



InfoScheduler for Crystal Enterprise

Installation & Administration Guide

June 10, 2003

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OVERVIEW

InfoScheduler for Crystal Enterprise is a bulk report-scheduling tool for Crystal Enterprise that allows scheduling of reports from an Excel spreadsheet. *InfoScheduler* runs as an add-in within Microsoft Excel 97/2000/2002.

For example, a Crystal Enterprise power user may have a list of 10 reports that are commonly run together for one customer/supplier/dept/etc. Change one column in the Excel file, press 'Schedule' and *InfoScheduler* creates a scheduled Info report instance for each spreadsheet row.

You can keep as many Excel files as you wish, each possibly representing different 'batches' of reports.

InfoScheduler is a standalone application that must be installed on any workstation where it is to be used.

DEMO VERSION LIMITATIONS & LICENSING

The demo version of *InfoScheduler* is a fully functional application with the following limitations - the Schedule command will only process the first 5 schedule rows, regardless of how many actually exist. This limitation is removed in the purchased version.

INSTALLATION OVERVIEW

Please follow these steps to install *InfoScheduler*:

- a) Ensure that the computer workstation is running Windows NT SP6, Windows 2000 (SP1 or greater) or Windows XP.
- b) Do not install *InfoScheduler* on a production InfoServer. Contact APOS Systems Inc. if you wish to do so.
- c) Ensure that the current computer user has Administrator rights for the computer where you are installing *InfoScheduler*.
- d) Stop all unneeded applications, virus scan utilities, etc.
- e) For Crystal Enterprise v.8 systems only . . .
Install ADO 2.6 data connectivity using MDAC_TYP.EXE. If necessary, download it from the Downloads section of www.apos.on.ca and save it to your local system environment and then run it.
- f) For Crystal Enterprise v.8 and v.8.5 systems only . . .
Skip this step if you are installing *Instance Manager* on a computer that already has Crystal Enterprise installed. Otherwise, using your Crystal Enterprise installation CD, select Custom installation and install ONLY Crystal Publishing Wizard, Custom Charting and Mapping Support. Make sure to disable the other options - Servers, Data Access, etc.
- f) For Crystal Enterprise v.9 systems only . . .
Skip this step if you are installing *Instance Manager* on a computer that already has Crystal Enterprise installed. Otherwise, using your Crystal Enterprise installation CD, select Custom installation and install ONLY the Developer components, Crystal Publishing Wizard, Custom Charting and Mapping Support. You do not need to install the other options - Servers, Data Access, etc.
- g) Download the *InfoScheduler* Demo setup program from the Downloads area of www.apos.on.ca and save it to your local system environment.
- h) Run the setup program (InfoSchedulerCESetup.exe) - please contact apos@apos.on.ca to obtain the set-up password.
- i) The setup program may require a system reboot when it finishes.
- j) From the Start menu, run *InfoScheduler for Crystal Enterprise* and test all elements. Try scheduling a very simple report without prompts and progress from there.

DISTRIBUTION SERVER INTEGRATION

If you have *Distribution Server* installed and you wish to integrate *InfoScheduler*, here are some things to keep in mind . . .

- a) The computer where you are installing *InfoScheduler* must have an ODBC datasource called DSDB that points to the ...*Distribution Server* CE\DSDB.MDB on your *Distribution Server* computer.

- b) If your *Distribution Server* database is not Microsoft Access, make sure that the connection string in the Dist Server Configuration button will allow *InfoScheduler* to connect. If in doubt, copy the connection string from the *Distribution Server* Configuration screen.

INSTALLATION GUIDELINES

A few tips and tricks regarding installation . . .

LOCAL WORKSTATION SETTINGS

Before installing on a Windows NT or Windows 2000 computer, ensure that the current user logged on to the local computer has administrator rights for that local machine. Also before installing, ensure that any unneeded services that are running on the local workstation are stopped - IIS, Virus scan services, etc.

INI FILE

InfoScheduler utilizes an ini file for a number of settings - see the Help tab for the details. Some of the ini file settings are set by the installation procedure and can be edited later using any text editor.

INSTALLATION LOG

Installing *InfoScheduler* creates an Install.log file in the directory chosen as the main program location during setup. This log file can be reviewed with any editor to see a complete log of the installation process, including all dll's installed or bypassed due to version checking being performed. Please check this log file if you require any information on what files were actually installed.

BACKUP DURING INSTALLATION

Installing *InfoScheduler* checks the version and date of a number of critical files and if appropriate will replace and try to register them automatically. Any files that are replaced during installation will be copied to a \Backup directory within the directory chosen as the main program location during setup. Please check this directory to see what files have been replaced. This step is provided to ensure that you have a copy of any older dll's, etc. that have been replaced in case you need them for some reason.

REBOOT DURING INSTALLATION

Some computers have older versions of some system dll's that cannot be updated without a reboot. If the installation procedure tries to replace such a file, Windows will force you to reboot your computer before continuing. If you are asked to reboot, simply run the setup program again after the reboot.

ENVIRONMENT REQUIREMENTS

InfoScheduler must be installed on each workstation where you want to run the program from.

CRYSTAL ENTERPRISE SERVER REQUIREMENTS

Crystal Enterprise v.8, v.8.5 or v.9

WORKSTATION REQUIREMENTS

Windows NT v.4 SP6, Windows 2000 (SP1 or greater) or Windows XP

Windows Installer for Windows NT (Windows NT workstations only)

Crystal Publishing Wizard (Crystal Enterprise v.8, v.8.5 & v.9)

Custom Charting (Crystal Enterprise v.8, v.8.5 & v.9)

Mapping Support (Crystal Enterprise v.8, v.8.5 & v.9)

Developer Components (Crystal Enterprise v.9 only)

DATA CONNECTIVITY REQUIREMENTS

ADO 2.6 (Crystal Enterprise v.8 only)

INFOSCHEDULER CAPABILITIES

Please refer to Online Help.

TROUBLESHOOTING TIPS

Here are some common challenges and tips:

INSTALL.LOG

Install.log is created by the setup procedure. You can check it for a detailed list of what was successfully installed or anything that failed. It can be found in the *InfoScheduler* directory location you specified during the setup procedure.

TECHNICAL SUPPORT

EMAIL SUPPORT

If you are unsuccessful installing *InfoScheduler* and require assistance, please email the details of your problem to support@apos.on.ca

HELP DESK

Telephone help desk support is available at 519-653-8332.

ERROR MESSAGES

Potential error messages include:

UNABLE TO CONNECT TO APS

This message normally indicates that the Crystal APS service is not running or that InfoScheduler is unable to connect to it. Confirm that the APS service is running and try again. If necessary, try to 'ping' the APS by name from the command window. If you are unable to 'ping' the APS successfully, you may need to add it to your workstation's hosts file.

COMPILE ERROR IN HIDDEN MODULE: MDUMAIN

This message normally indicates that ADO 2.6 was either not installed or was corrupted in some way. Please download ADO 2.6 from the Downloads area of www.apos.on.ca, save it to your local system and then install it. This message may also result if the current computer user does not have Administrator rights for that computer. Without Administrator rights, the set-up program is unable to register some of the components reliably. Reboot the computer and log in as an Administrator user and run the set-up program again.

UNABLE TO DELETE SOME OLD FAILED INSTANCES

You may have some old reports that were deleted or orphaned from the enterprise system, if so contact your tech support people to see if they could delete these reports from your database.

HAVING TROUBLE SCHEDULING A REPORT IN INFO SCHEDULER. EXAMPLE. A REPORT ON THE C:\ DRIVE AND TRYING TO SCHEDULE WITH 'TEST\TEST1.RPT IN THE REPORT SOURCE NAME FIELD.

The report must be in the Crystal Enterprise environment and you don't need to put a file extension in the Report Source Name field. Delete the entire row and enter it again.

RECEIVING AN ' APS COULD NOT BE FOUND - PLEASE TRY AGAIN ERROR

Is ADO and all the other Crystal componenets installed on machine. The message may also appear if using Windows 95 as your Operating System. *InfoScheduler* is not supported on Windows 95

HAVING PROBLEMS GETTING STARTED. WHEN SCHEDULING A REPORT IT IS SAYING THAT THE REPORT DOES NOT EXIST.

Make sure that the report exists in the Crystal Environment

INFO SCHEDULER WAS SHUTTING DOWN AFTER INSTANCES WERE SCHEDULED AND TOTALLY SHUTTING DOWN EXCEL

Delete the instances that existed after the shutdown occurred and re-enter. You may have the old version of the ciapi32.dll. Check the version that you have and email that to APOS Systems.

NOT ABLE TO SCHEDULE REPORTS USING THE REPORT SOURCE NAME BUT USING REPORT ID WORKS FINE.

You may have leading spaces before the folder names which *InfoScheduler* trims off so the report would never be found.

REVISION HISTORY

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