

CFAR “How-To” Series

How to Install CFAR

CFAR is an ad-hoc report writer that allows you to report on data that resides in your Connectwise Automate and Manage databases.

ATTENTION: At this time, CFAR works only with the “on premise” version of Automate – it does not support Automate “in the cloud”. For Manage, both “on premise” and “cloud” versions are supported, though cloud support requires that you purchase an additional product from Connectwise called “Connectwise CloudConnect”.

There are four steps to a new install of CFAR:

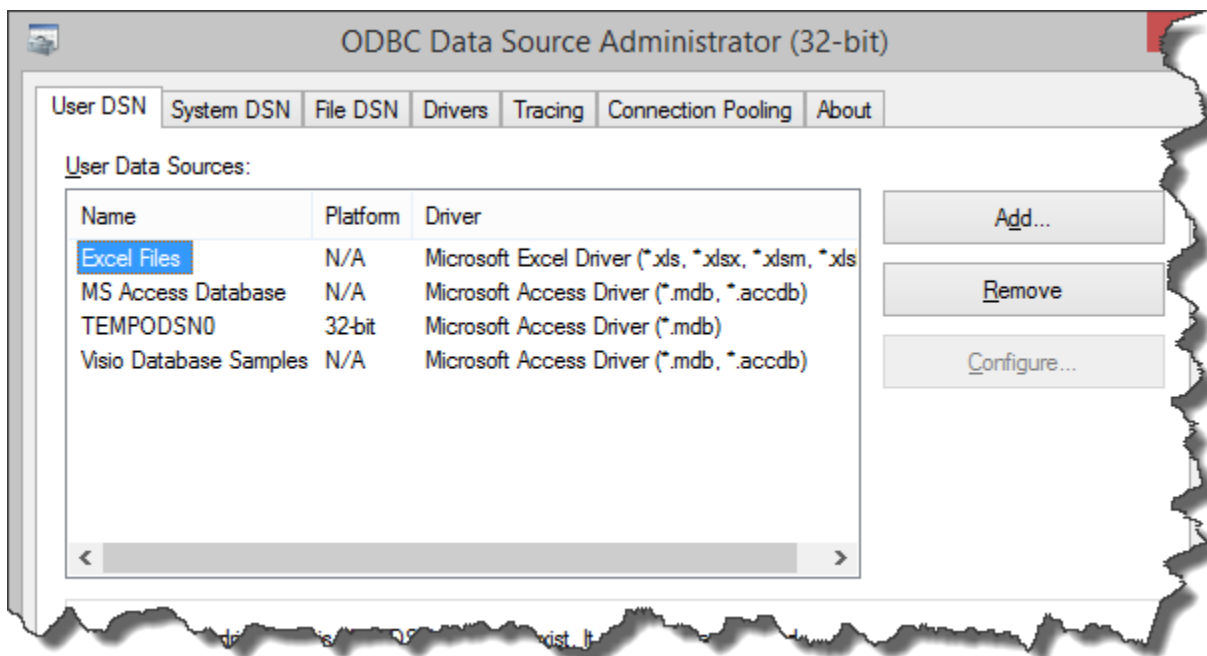
1. Configure ODBC connections to your databases;
2. Download the latest CFAR release from the Rose Valley Software Studio website;
3. Install the downloaded version; and
4. Set CFAR configuration options.

Let’s take a closer look at each of these steps...

Step 1: Configure ODBC Connections

This first step involves setting up the ODBC connections that give CFAR access to your Automate and Manage databases. To create these connections, run the 32-bit version of the ODBC Data Source Administrator tool located in the Windows\SysWow64 folder. (The actual file to execute is named “odbcad32.exe”).

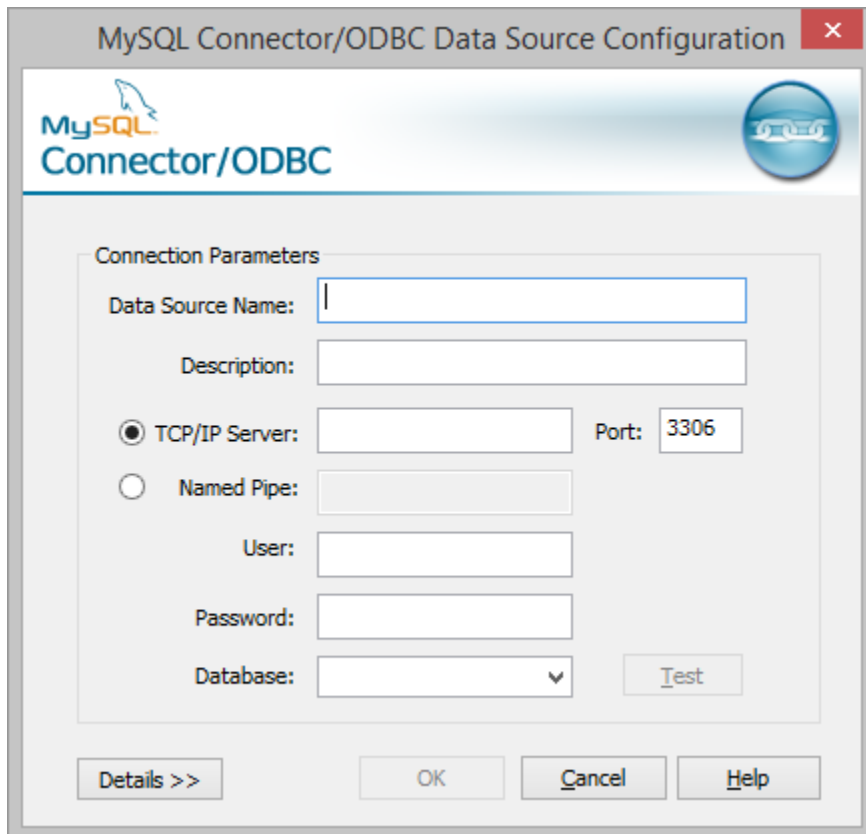
After you start the tool, you should see something like this:



Next, click the “System DSN” tab; this will direct the software to create System DSNs which can be shared by different users.

Next, if you want to make reports on data that resides in Automate:

- Click the “Add” button
- In the Driver list, pick a MySQL driver (version 3.5x or 5.1x). If the driver does not exist, go to the MySQL website and download and install the 32-bit driver you want to use.
- Once the driver is selected, a configuration window will appear (see below):



The image shows a screenshot of the "MySQL Connector/ODBC Data Source Configuration" dialog box. The window title is "MySQL Connector/ODBC Data Source Configuration" with a close button (X) in the top right corner. The dialog features the MySQL logo and "Connector/ODBC" text in the top left. Below this is a "Connection Parameters" section with several input fields: "Data Source Name:" (a text box), "Description:" (a text box), "TCP/IP Server:" (a radio button selected, followed by a text box), "Port:" (a text box containing "3306"), "Named Pipe:" (a radio button unselected, followed by a text box), "User:" (a text box), "Password:" (a text box), and "Database:" (a dropdown menu). A "Test" button is located to the right of the "Database" dropdown. At the bottom of the dialog are four buttons: "Details >>", "OK", "Cancel", and "Help".

Enter information for the following fields:

Data Source Name: CFARLT

TCP/IP Server: Name or IP Address of database server

User Name:

Password:

Database:

NOTE: You must set the Data Source Name to “CFARLT” or the CFAR application will not work.

To finish the connection, click the “Test” button. If the test is successful, click “OK” to save the connection.

NOTE: As of Automate version 2021.1, ConnectWise no longer allows the use of accounts created inside of Automate for use with ODBC connectivity. To create an “external” account, complete the next four steps. (You may need a tool like SQLYOG to complete this task.)

1. Connect to the MySQL database as a user with root access.
2. Create a new MySQL user and add any necessary privileges or permissions (see Figure 1 below).
3. Save the user.
4. Add information about the new user to the “Users” table in the LabTech database:
 - Add a new row (record) to the Users table with a unique negative ID (e.g. -10)
 - In the name column, enter the username of the new user you created in steps 1-3 above (See Figure 2 below).
 - Save the new record

To test to confirm the new user was added correctly, restart the database agent software (Itagent service): if the user remains in the LabTech databases “Users” table, the user was created correctly; if it disappears, you will need to re-add the user again making sure you complete all steps above correctly.

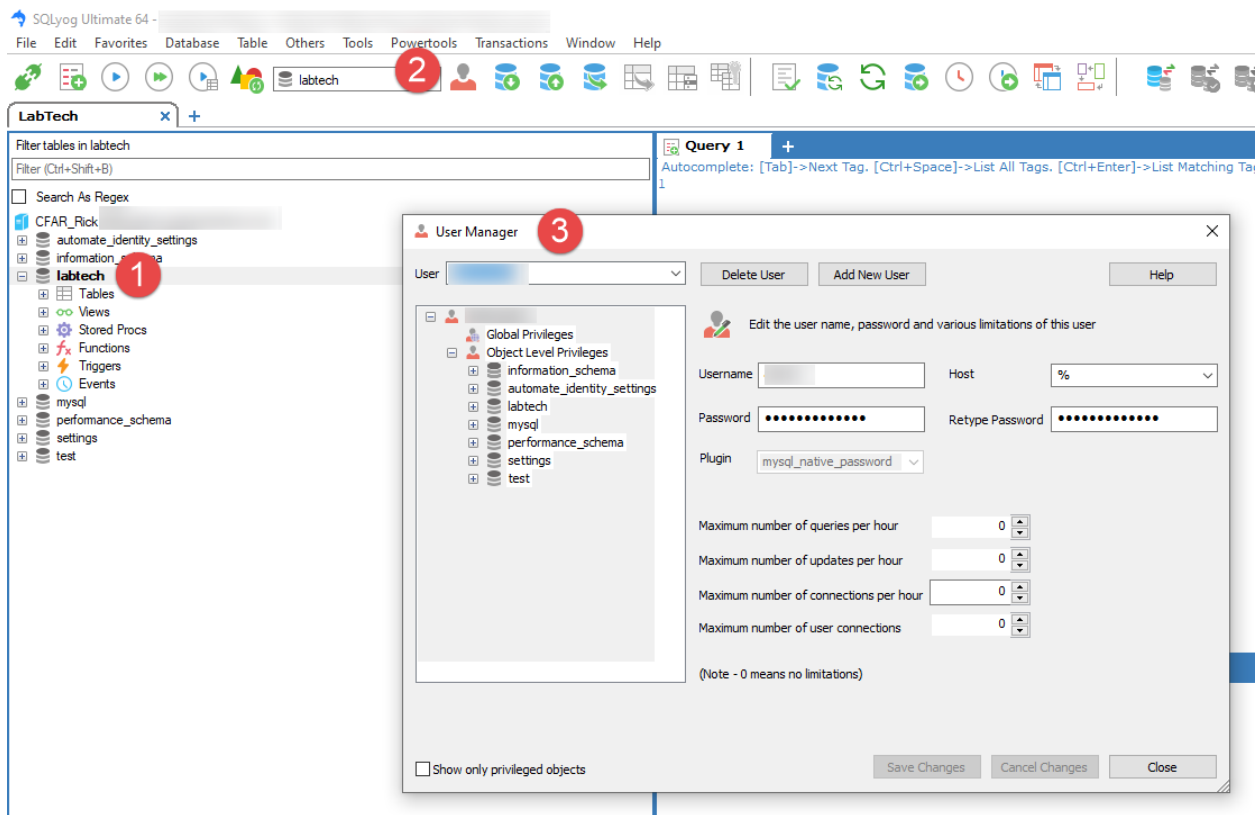


Figure 1: Adding the external user

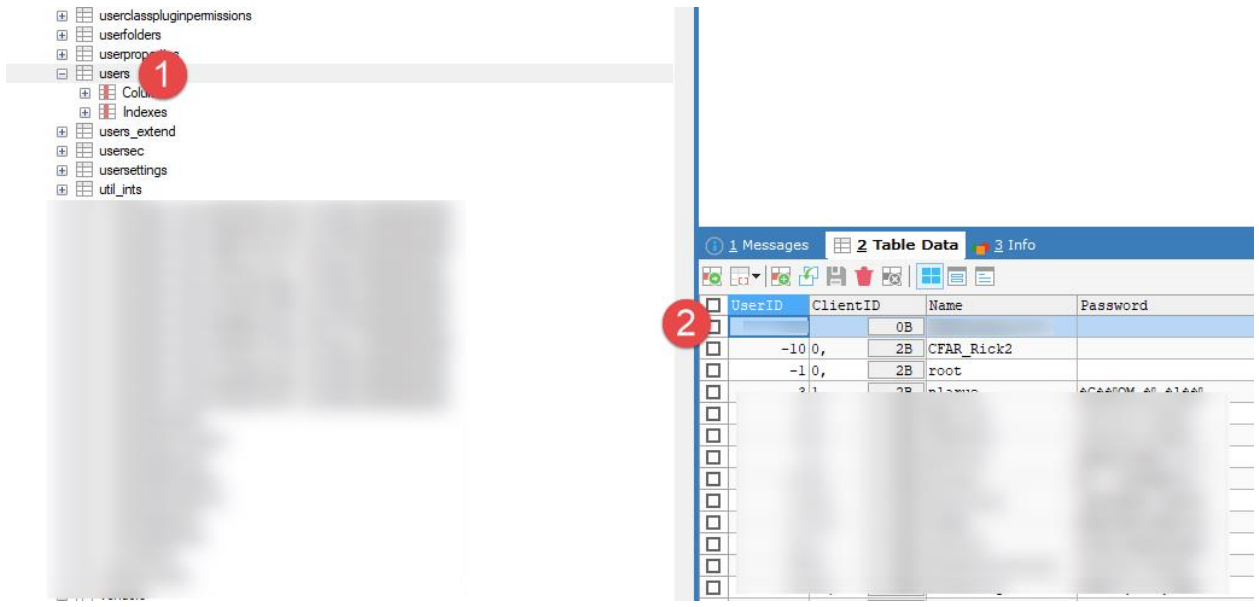


figure 2: Adding new "external" user to the LabTech "Users" table

Next, if you want to make reports on data that resides in Manage:

- Click the "Add" button
- In the Driver list, pick the SQL Server driver

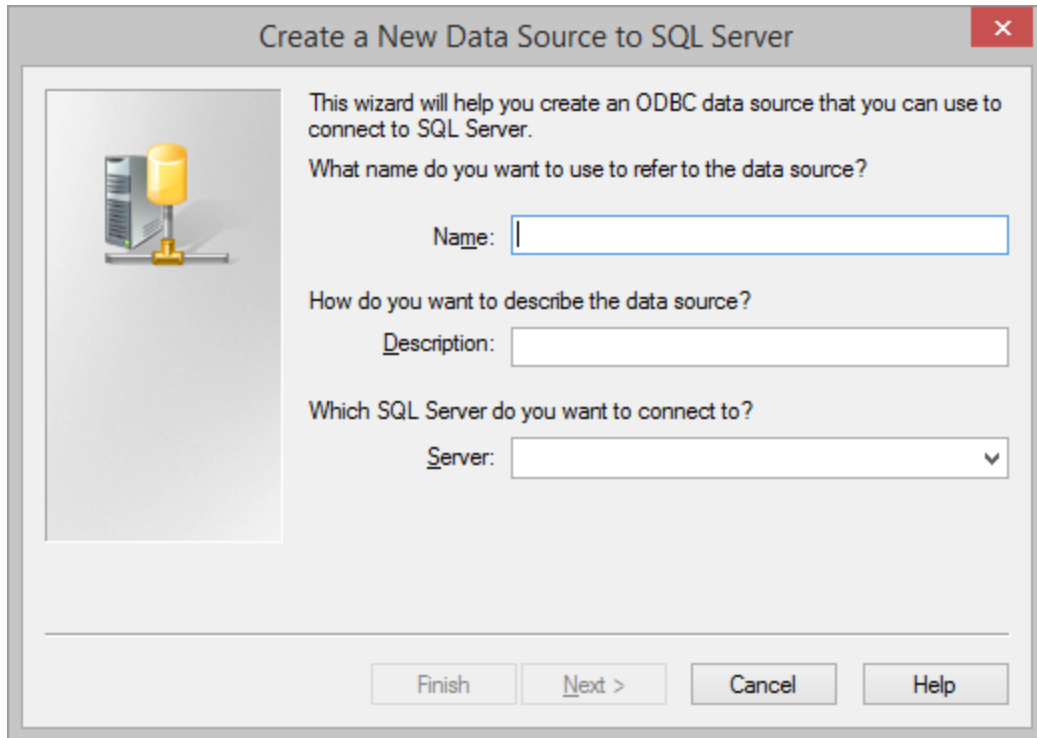
NOTE: There are several ODBC drivers available for Microsoft SQL Server, including:

- SQL Server
- SQL Server **Native** Client *version*
- ODBC Driver *version* for SQL Server

where *version* is a version number (for example, ODBC Driver 17 for SQL Server).

Which one you should use with CFAR depends on a few things:

- As of late 2019, the "ODBC Driver 17 for SQL Server" driver is the newest driver, so it may be the best one to use for your system. However, it doesn't work with SQL Server versions prior to 2008, so you may need to use an older driver in that case (the "ODBC Driver 11 for SQL Server" driver works with SQL Server 2005 and later). This driver isn't automatically installed with Windows, but it can be downloaded from <https://www.microsoft.com/en-us/download/details.aspx?id=56567>.
 - The "SQL Server" driver works with all SQL Server versions and comes installed with Windows. However, if you use this driver, Date fields are retrieved by CFAR as character, so in that case, use the "ODBC Driver 17 for SQL Server" driver instead.
 - SQL Server **Native** Client is deprecated and Microsoft does not recommend it for new development work.
- Once the driver is selected, a configuration window will appear (see below):



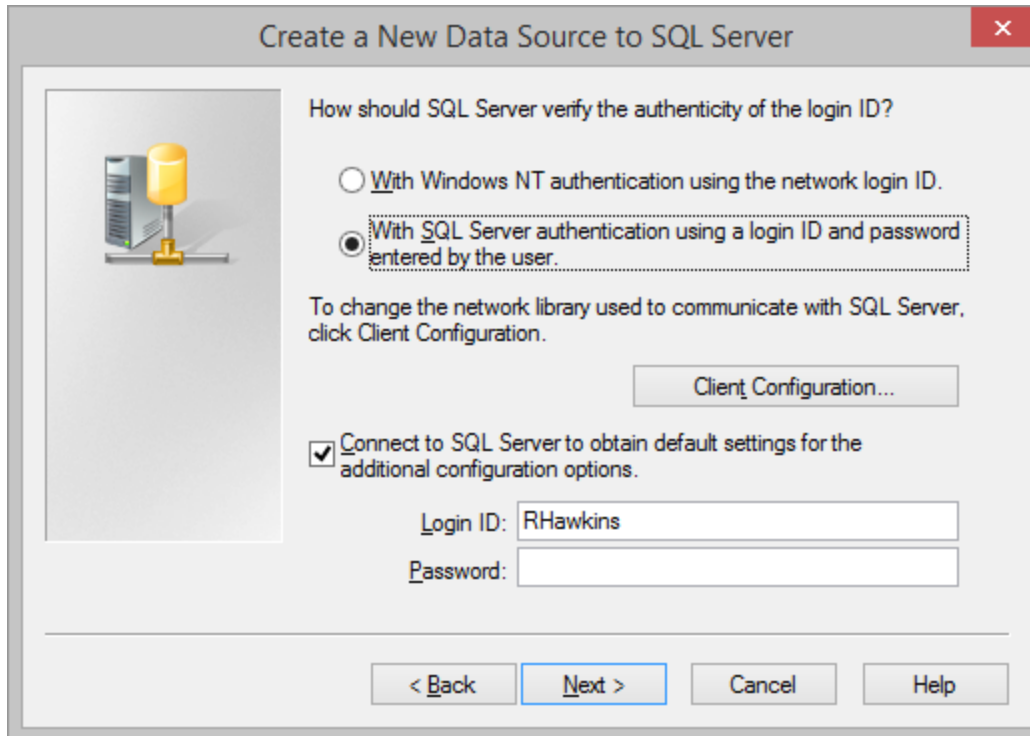
For the first page, enter information for the following fields:

Name: CFARCWL

Server: Name or IP Address of database server

NOTE: You must set the Name to “CFARCWL” or the CFAR application will not work.

When ready, click the “Next” button at the bottom of the window; page 2 of the Configuration window will appear:



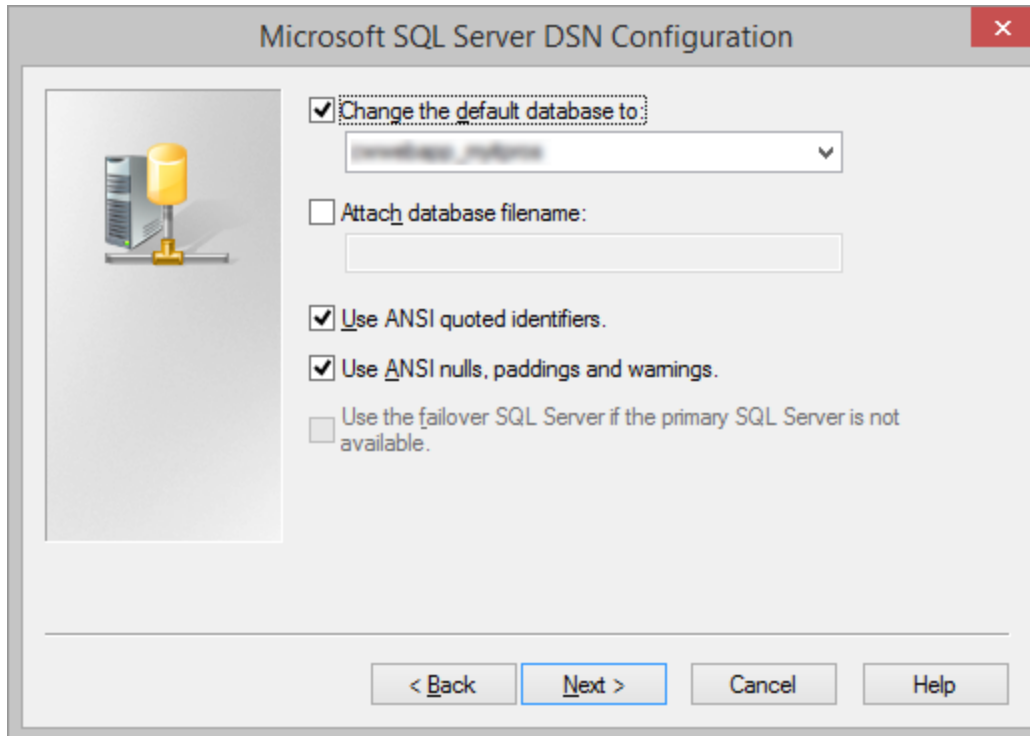
For the second page, enter information for the following fields:

Set authentication to “With SQL Server authentication...”

Login ID

Password

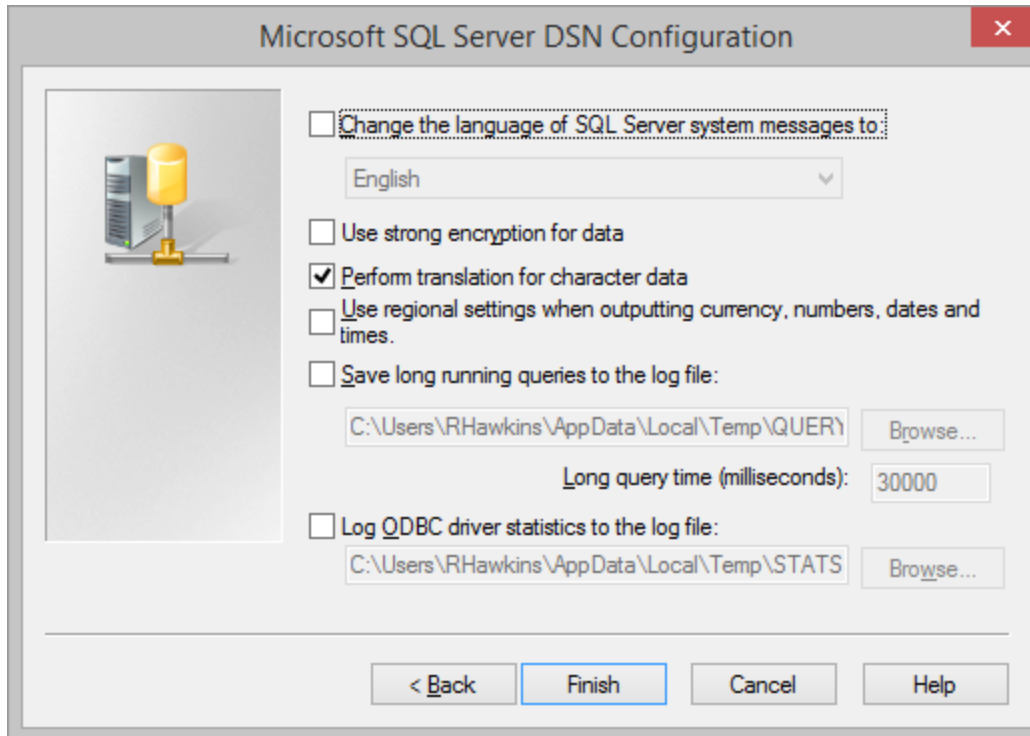
When ready, click the “Next” button at the bottom of the window; page 3 of the Configuration window will appear:



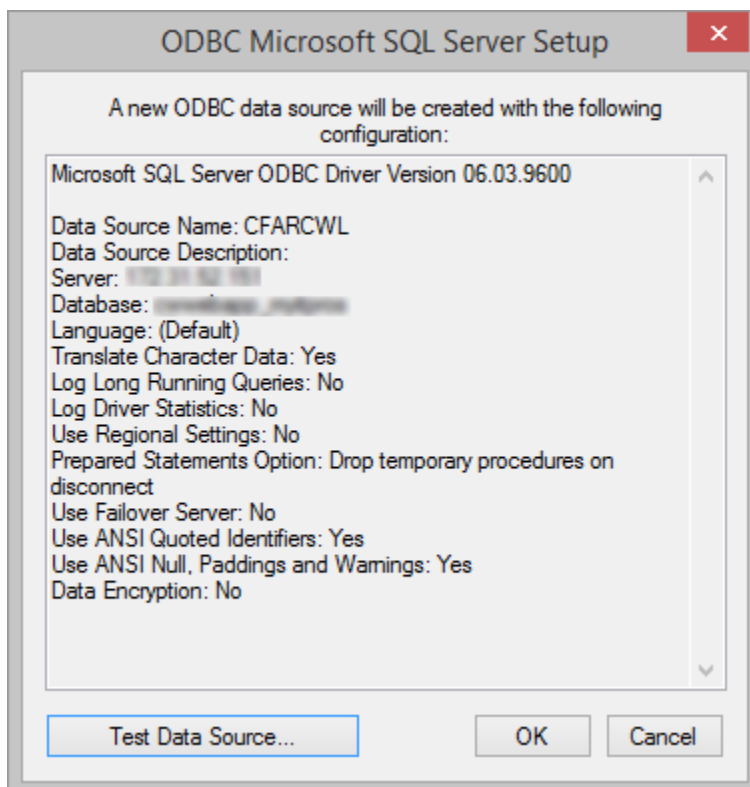
For the third page, enter information for the following field:

- Check the “Change the default database to”
- Select your Connectwise Manage database from the drop-down list

When ready, click the “Next” button at the bottom of the window; page 4 of the Configuration window will appear:



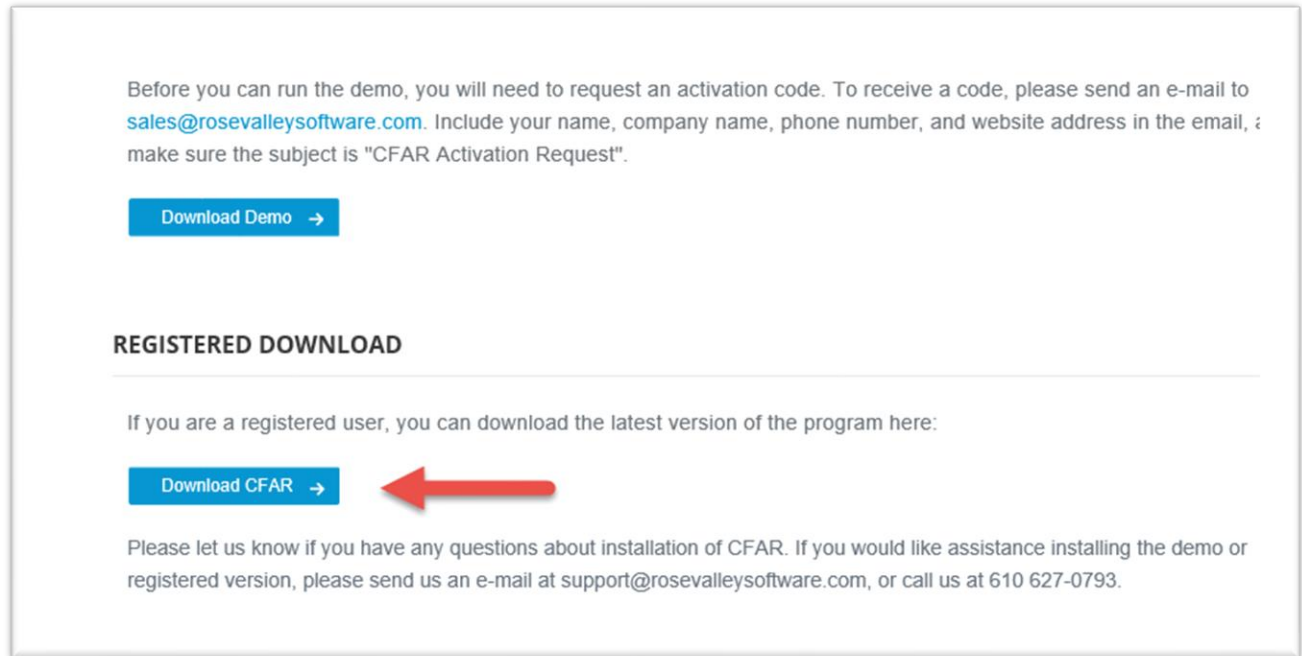
When page 4 of the Configuration appears, click the “Finish” button at the bottom of the window; the following window will then appear:



Click the “Test Data Source” button to test the connection. If the test is a success, click “OK” to save it.

Step 2: Download Latest Release

Use a browser to navigate to www.rosevalleysoftware.com. Once there, click on the "Download" link that appears at the top of the page - this will take you to the download page. Find and click the Download button:



(Note: Click the Demo link if you are trying CFAR for the 15-day trial.)

After a few seconds, the download should begin.

Step 3: Install the Downloaded Version

Now you are ready to install the downloaded version. Double-click the Setup.EXE file and accept all the default choices.

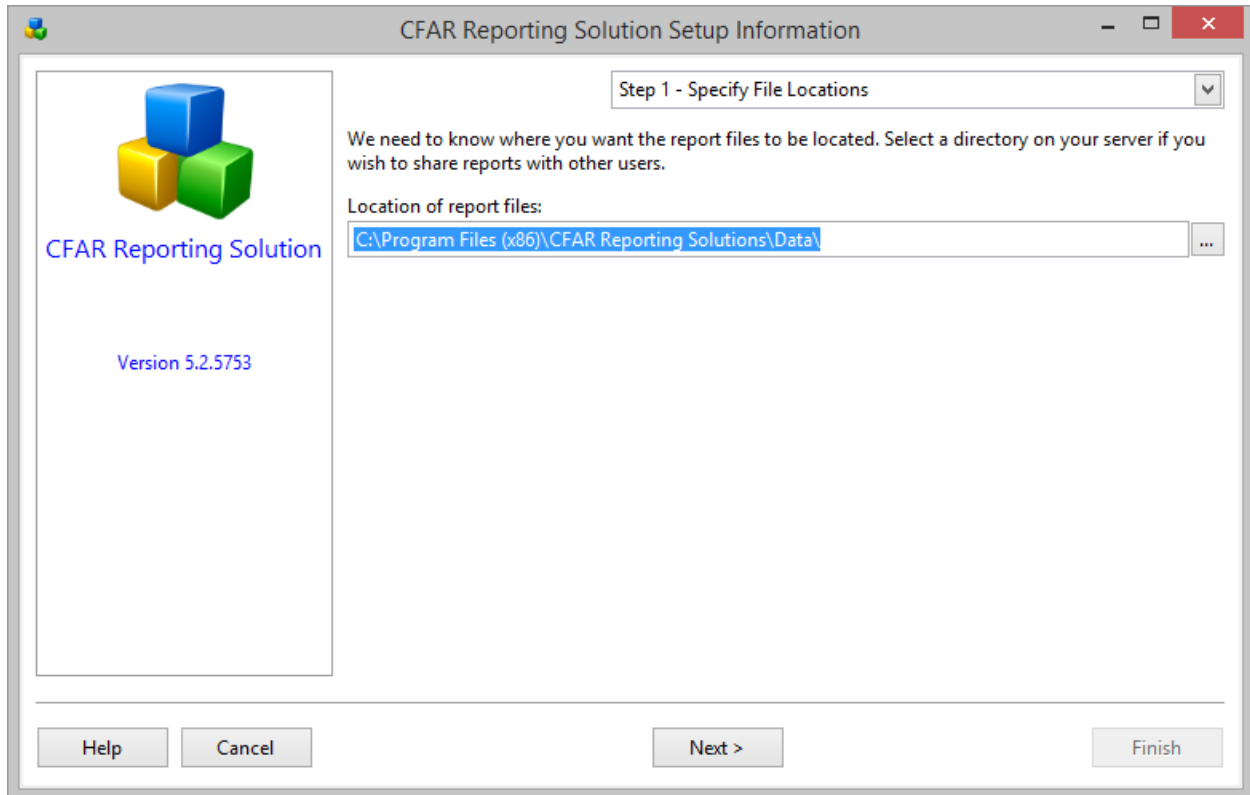
Only one step left...

Step 4: Set CFAR Configuration Options

After installing the new version, start CFAR.

The program will do an update, then immediately shutdown.

Start CFAR again. This time it will ask you if you want to configure CFAR for use with LabTech data; answer yes or no. If you respond "Yes", it asks you if you are using LabTech version 10. It then asks if you want to configure CFAR for use with Connectwise and with Continuum. After answering all of the questions, the following window appears:



Specify a location for your report files. Place them in a folder that can be shared easily by all expected CFAR users. If you choose to place them in a folder of a mapped drive, use a UNC path instead of the mapped drive letter. Using a UNC path will make it easier to automate/schedule reports if you decide to do so.

Next click the “Next” button at the bottom of the window and complete your contact information, followed by “Next” and the completion of information about your email system.

When you click the “Finish” button, there will be a pause of about a minute while CFAR copies the 350+ sample reports, graphs, and dashboards to your new reports directory.

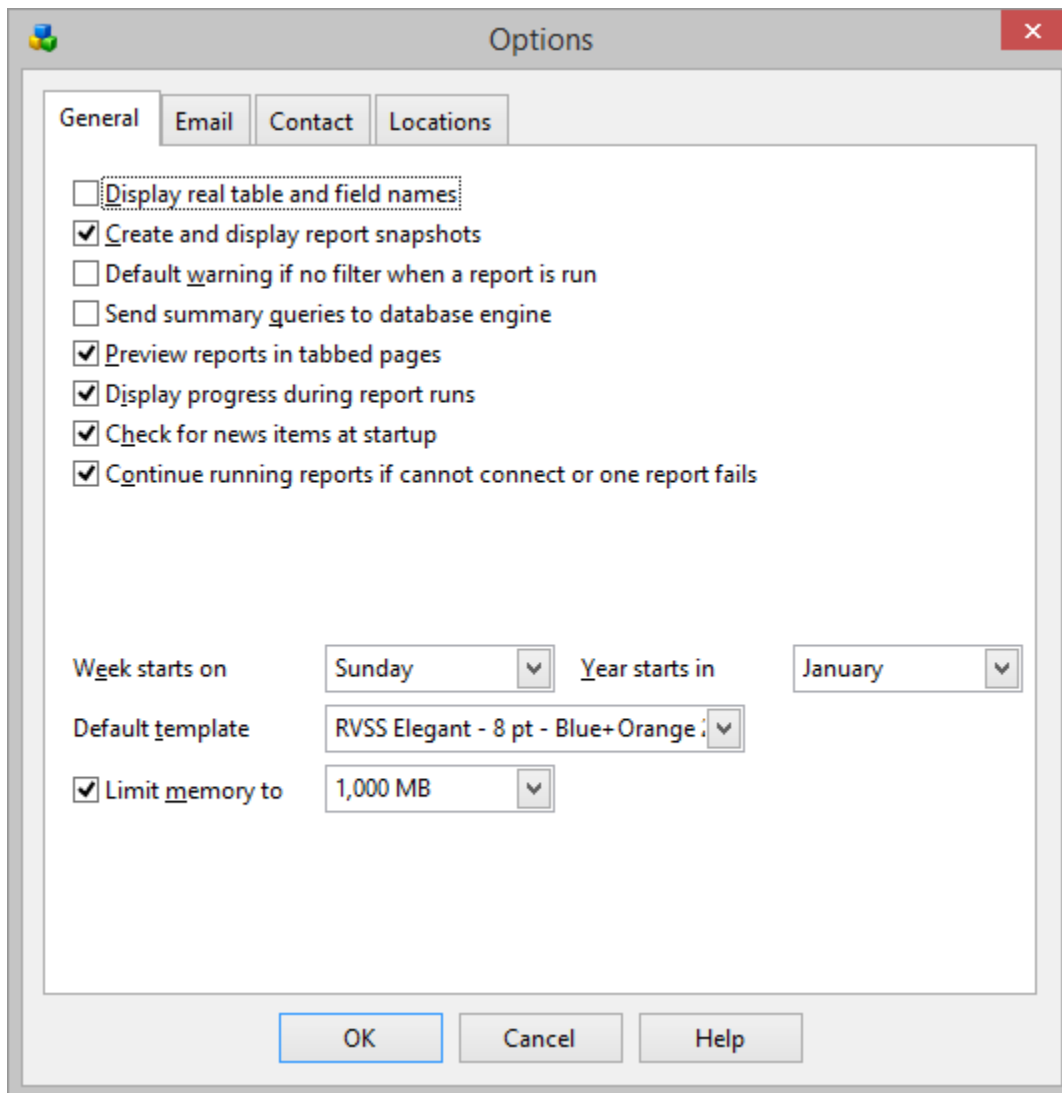
NOTE: While the sample reports are loading you may receive questions about loading formulas into the app. If this is your first installation of CFAR, answer “Yes” to every question.

Once the reports have loaded, exit then re-start CFAR one more time. This time it will ask you for your demo code if you are running it as a trial. Enter the code sent to you.

If you are a licensed user, select the option to “Activate” the license, then enter the license code sent to you.

Login to CFAR using “ADMIN” for the user name, and “ADMIN” for the password.

Once you are logged in, click the “Tools” menu, then select “Options” to complete the configuration task. In a moment, the following window should appear:



Add or change the following fields:

- Remove the check-mark from “Default warning if no filter when a report is run”
- Add a check-mark to “Preview reports in tabbed pages”
- Add a check-mark to “Continue running reports if cannot connect or one report fails”
- Change the “Default template” to “RVSS Elegant – 8 pt. – Blue+Orange 2”
- Set “Limit memory to”: By default, CFAR isn't limited in how much memory it can use. That doesn't mean it automatically takes up all of your system memory, just that it can use as much as is available when running a very long report. Database querying is memory-intensive, so this provides better performance. However, in some cases, especially in Windows Terminal Server environments where multiple users run CFAR on the same server at the same time, this can end up limiting the amount of memory available for other applications or other users. In that case, turn this setting on and select the maximum amount of memory you want CFAR to use. Note: this setting is set the same for all users.

Congratulations! You are now ready to run some reports.

If after reading this you still have a question about the installation process, please contact us at support@rosevalleysoftware.com.