



## *Scribe Insight Installation Guide*

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Version 7.6.2  
October 16, 2013  
[www.scribsoft.com](http://www.scribsoft.com)



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# 1. Scribe Installation Overview

Before you install Scribe, you should have an understanding of the components you will be installing, as well as an overview of the installation process.

## Scribe Component Overview

Scribe consists of several components, most of which will reside on your Scribe server.

The Scribe server does not need to be a dedicated computer. You can install Scribe on your application server or database server; however, optimal performance is typically realized by installing Scribe server components on a dedicated computer. The non-server components can be installed on any workstation that meets the system requirements for that component.

## Scribe Components

There are four main components included in the Scribe installation:

- **Scribe Internal Database** – The Scribe Internal database (SCRIBEINTERNAL) is a Microsoft SQL Server database used by all other Scribe components. The database contains settings, process execution history, error logs, and other Scribe-related data. If your site does not have SQL Server you can optionally install Microsoft SQL Server Express as part of the Scribe installation process.
- **Scribe Insight server** – The Scribe server uses Windows services to provide automated integration processes and system monitoring. The Scribe Insight server also includes Scribe Workbench and Scribe Console components.
- **Scribe Workbench** – The Scribe Workbench provides a rich graphical environment in which data mappings can be designed, tested and manually run. These data mappings can be saved as data translation specification (.dts) files, which are the fundamental building blocks of Scribe processes.

After installing and configuring the Scribe server, you can install the Scribe Workstation, which includes the Scribe Console and Workbench, on any workstation on your network. For information about installing Scribe Workstation, see [Section 5 Installing Scribe Workstation](#).

- **Scribe Console** – The Scribe Console is a Microsoft Management Console (MMC) - based application that provides a user interface for configuring and managing automated integration processes on the Scribe Insight server. You can install the Scribe Console and Workbench independently from the rest of the product (as the Scribe Workstation), and configure it to connect to a Scribe server on your network or over the Internet.

## Additional Scribe Software

You can optionally install the following software:

- **Scribe adapters** – Scribe adapters provide an interface to a specific application or technology. Scribe has a full suite of adapters for the leading front office and back office applications. The adapters are included as part of the Scribe installation.

See the Help for each adapter for more information about installing and using Scribe adapters in your particular environment. For more information, see the [Scribe Help Library](#).

- **Scribe templates** – Scribe Software provides a suite of free templates that can be used as a starting point to develop your integration or migration. The templates can be configured from the Scribe Console to meet the requirements of your specific integration or migration project.

Note that the Scribe templates are provided without charge on an as-is basis.

## 2. Installation Prerequisites

Before you begin installing and configuring the Scribe components, you need to make sure that your environment is complete and correctly configured.

Scribe products run on most modern Windows-based computers. Additional internal memory, faster processors, and larger hard drives can improve response times.

### Supported Operating Systems

- Windows 2012 Server Data Center and Standard Editions (x64)
- Windows 2008 Server R2 Enterprise and Standard Editions (x64)
- Windows 2008 Server Enterprise and Standard Editions (x86 and x64) with Service Pack 2
- Windows 7 Enterprise Edition (x86 and x64)

### Minimum Hardware Requirements

While Scribe Software does not require that the Scribe server be on a dedicated computer, installing the Scribe server components on a separate, dedicated computer can greatly improve performance. However, if necessary, you can install Scribe on your application server or database server.

Minimum hardware requirements are:

- 32-bit processor – 1 GHz (or greater)
- 64-bit processor – 2.4 GHz (or greater)
- 1 GB of system memory is required, 3GB is recommended

### Microsoft Windows Components

- Microsoft.NET Framework 4.0 or later (the Scribe installer provides you with an option for installing Microsoft .NET Framework 4 if it is not already installed)
- IIS 7 with IIS 6 Management Compatibility Mode may be required depending on the Scribe server Operating System version and installed components
- Microsoft Message Queuing Service (MSMQ) – if using message queuing or Scribe publishers

### Database Requirements

- Microsoft SQL Server 2012: Enterprise, Standard, and Express
- Microsoft SQL Server 2008 R2: Enterprise and Standard
- Microsoft SQL Server 2008: Enterprise and Standard
- For Scribe products, the SCRIBEINTERNAL database is supported only on Latin\_General collation orders (either case-sensitive or non-case-sensitive).

## Permissions Required to Run Scribe Insight

Local administrator permissions are required to install Scribe products. However, to run Scribe as a domain user requires certain Windows user permissions.

This section describes the domain user permissions required to run Scribe. Your Windows environment determines how you access Windows Component Services and Computer Management. Because Scribe runs in multiple Windows environments, some fields, dialogs, and components may have different names than described here.

### Setting permissions for all users or groups

Domain users who will be running Scribe Services need:

- Permission to launch and access Scribe Services
- Full access to the Scribe message queues

### Providing permission to launch and access Scribe services

As part of the installation process, five Scribe services are installed:

- Scribe AdminServer
- Scribe BridgeServer
- Scribe EventManager
- Scribe MessageServer
- Scribe MonitorServer

In Windows Component Services, ensure that each domain user has permission to launch and access Scribe services:

1. Start Windows Component Services.
2. Under Computers>My Computer, click **DCOM Config** to open it.
3. For each Scribe service as well as for MessageProcessor, right-click the Scribe service (Scribe AdminServer, for example) and select **Properties**.
4. On the Security tab, under **Launch and Activation Permissions**, click **Customize**.
5. Click **Edit** to open the Launch and Activation Permission dialog box.
6. Click **Add**, and add the domain user.
7. Under **Permissions**, select **Allow** for **Local Launch** and **Local Activation**.
8. Click **OK** to save your changes and close the Launch and Activation Permission dialog box.
9. Under Access Permissions, click **Customize**.
10. Click Edit to open the Access Permissions dialog box.
11. Click Add and add the domain user.

12. Under **Permissions**, select **Allow** for **Local Access**.
13. Click **OK** to save your changes and close the Access Permissions dialog box.
14. Repeat steps 3 and 4 for each Scribe service and for MessageProcessor.
15. When you are done, exit Component Services.

## Providing full access to the Scribe message queues

Under Windows Computer Management, you must provide access to Scribe message queues and, depending on your installation, other message queues used by Scribe:

1. Start Computer Management.
2. In the Computer Management tree, select **Computer Management>Services and Applications >Message Queuing>Private Queues** to open the **Private** (or Private Queues) node.
3. From the Private Queues node, right-click **scribedeadmessage** and select **Properties** to open the Properties dialog box.
4. From the Properties dialog box:
  - a. Select the **Security tab**.
  - b. Click **Add**, and add the domain user.
  - c. Under Permissions for the domain user, click **Allow Full Control**.
  - d. Click **OK** to save your changes and close the Properties dialog box.
5. Repeat steps 3 and 4 for:
  - **ScribeIn** queue
  - **ScribeRetry** queue
  - Any other queues used by Scribe (such as Publisher queues for Microsoft Dynamics CRM or Microsoft Dynamics NAV adapters).
6. When you are done, close **Computer Management**.
7. Restart **Message Queuing service** and the **Scribe Services**.

## Other required privileges

If the domain user will be using one of the following adapters, you must grant Full Control to the Windows\Temp folder:

- Microsoft Dynamics CRM
- Salesforce.com
- Web Services

If your site uses Windows Authentication, you must set up the domain user as a principal in Microsoft SQL Server with access to the Scribe Internal database. This user must have alter, delete, execute, insert, select and update privileges.

## Insight User Licensing

When your organization buys Scribe Insight, it purchases an Edition based on the number of CRM or ERP users that they license through applications such as Dynamics CRM, Salesforce, or Dynamics GP that will be used to connect with Insight.

For example, let's say your organization runs both Dynamics CRM and Salesforce CRM systems. You have:

- 50 Dynamics CRM user licenses for Rose & Thorn Company
- 50 Dynamics CRM user licenses for Green Landscapes Company
- 120 Salesforce users for Flowers for All Organization

When you use Insight to connect to those companies, Insight adds the total number of licensed users for those systems, for a total of 220 users. Therefore, your organization must purchase a Scribe Insight Standard license that allows (or supports) up to 250 users. If you add a new Salesforce Organization with 100 users, you now have 100 Dynamics CRM users and 220 Salesforce users, for a total of 320. This exceeds the number allowed by your current Insight license.

As soon as the total number of CRM users exceeds the number of users for your Insight license, your Insight Administrator receives a warning email each day that these connections are used. At this point, your organization must either:

- Upgrade the Insight license to accommodate more users.
- Stop using a connection to bring the total number of CRM users to under the licensed number (250 in this example).

If your organization does not neither upgrades nor reduces the number of users, your Insight Administrator receives warning emails for 15 days. After that time, jobs using these connections no longer run.

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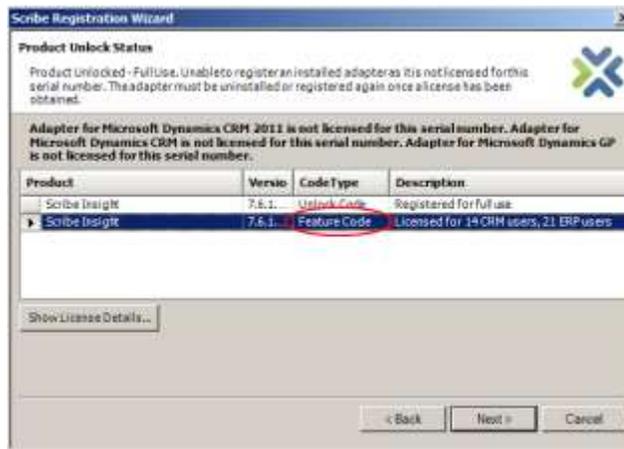
**Note:** CRM and ERP users are counted separately. However, the same rules apply for organizations using ERP applications.

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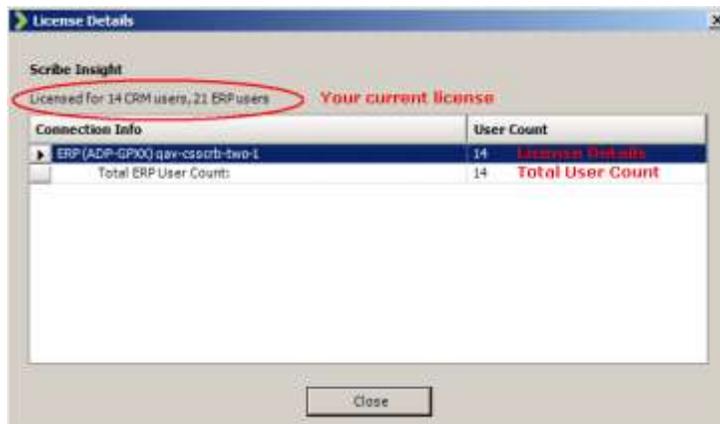
## Determining your current number of users

To determine the number of licensed CRM or ERP users currently using Scribe Insight:

1. From the Scribe Insight Workbench, click **Help** on the Main Menu.
2. Select **Add or Upgrade license** to start the Scribe Registration Wizard. The Select Registration Option page opens.
3. Click **Next**, and click **Next** again on the License Upgrade/Expansion and Collect User Information pages.
4. On the Product Unlock Code page, select the **Scribe Insight** product **Feature Code** line and click **Show License Details**. (Click the left-most column to select the entire row.)



The License Details window displays with information about your licensed applications and total user count for both CRM and ERP systems. For example:



## Selecting and Preparing an Authentication Method

Before you install Scribe and create the Scribe Internal database, decide whether your site will use SQL Server Authentication or Windows Authentication, and prepare your site to use the selected method.

### Installing Scribe with SQL Server Authentication

For information about installing the Scribe Internal database using SQL Server authentication, see [Setting up the Scribe Database](#). For SQL Server authentication, you need:

- A Windows user that is the local administrator
- The user name and password of the SQL Server SA user

### Installing Scribe with Windows Authentication

For information about installing with Windows Authentication, see Section [7 Installing Scribe with Windows Authentication](#). To install Scribe with Windows authentication, you need:

- A Windows user that is the local administrator
- The name and password of a Windows account that has database create and modify privileges on SQL Server
- The name and password of a Windows principal with datareader and datawriter access

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#### Notes:

If you are installing Insight with any edition of Microsoft SQL Server 2012, edit the properties of the Scribe services to log on as a principal with proper rights, as described in Section [7 Installing Scribe with Windows Authentication](#).

If you are upgrading from a previous release and want to change from SQL Server Authentication to Windows Authentication, see the [Scribe Online Help](#) for more information.

The SCRIBEINTERNAL database is supported only on Latin\_General collation orders (either case-sensitive or non-case-sensitive).

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## Failover Requirements

The Scribe Failover feature is only available with Scribe Professional and Enterprise licenses.

Before you install Scribe in a failover environment, ensure that the Microsoft Cluster Server is installed and configured properly. Scribe Failover is available for Microsoft Server 2008 R2. See the Microsoft Clustering Services documentation for detailed instructions. For information about installing Scribe in a failover environment, see Section 8, [Configuring a Two-Node Scribe Insight Server Failover Cluster](#).

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**Note:** To run Scribe in a failover environment, Windows Authentication for SQL Server is required.

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When you install Scribe on the active node, you create a Scribe Internal Database. To do so, you need the username and password of a Windows account with database create privileges.

In addition, you need the name of the Windows principal for the Cluster Service. This user must have datareader and datawriter privileges and needs to be added to the Scribe Console Users group, the Scribe Console Admins group, and the Scribe Internal database.

# 3. Installing Scribe Insight Server

## Downloading Scribe Software

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**Note:** You need to be logged in as a user with local administrator privileges. Local administrator privileges are required for many of the installation and configuration steps.

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1. Verify that you:
  - Have appropriate hardware and software
  - Have the login names and passwords for any login accounts to be used with Scribe
  - Know which authentication method your site will use for SQL Server
  - Have any required serial numbers
2. Navigate to the [Scribe Insight and Adapters Downloads](#) page, and select the correct installer for your software (32- or 64-bit).
3. When the download completes, run the self-extractor to unzip the installer files.

This creates a directory that contains the installer files. The directory is called ScribeInsight, followed by the release number and the processor speed; for example: ScribeInsight760\_x64.
4. Open the directory and run **Setup.exe** to start installing Scribe components.

If you are not logged in as a user with administrative privileges, an error appears, stating that you are not an administrator. Log out, log into an account with local administrator privileges, and repeat this procedure.

## Installing Scribe Insight Server Prerequisites

When you run **Setup.exe**, the Scribe Insight Setup window opens, displaying information about Microsoft components required to run Scribe. If any required components are not installed, you have the option of installing them.

Alternatively, you can install missing components: exit out of the Scribe Insight Setup window, install the necessary components, then restart the setup procedure.

The components are:

- **Microsoft Windows Installer 3.1** – Allows Scribe to install the Insight Server. If the Microsoft Windows Installer is not available, the check box is automatically selected to allow the Scribe Insight Setup Wizard to install it.
- **Microsoft .NET Framework 4.0 or later** – If the correct version of the Microsoft .NET Framework (including any Service Packs) is not installed, the check box is automatically selected to allow the Scribe Insight Setup Wizard to install it.
- **Microsoft SQL Express 2012** – If your site already has Microsoft SQL Server installed, you can use an instance of SQL Server for your Scribe internal database. If you do not have Microsoft SQL Server, select the check box to install Microsoft SQL Server Express 2012, which is provided as part of the Scribe software package.

In addition, you can install the current version of Scribe and adapters from the Scribe Insight Setup window. Adapters can be installed or removed after installing Scribe.

To learn more about the adapters, see the online help for each adapter at the [Scribe Insight and Adapters Downloads](#) page.

### To install Scribe prerequisites

1. Select or clear the features you want on the **Scribe Insight Setup** window.
2. Click **Start Installation**.
3. If you are installing the Microsoft Windows Installer, the installation window displays. Follow the instructions and allow the installation to complete.
4. If you are installing Microsoft SQL Server Express, the **Create SQL Express SA Password** window displays. Follow the instructions to create a System Administrator password.

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**Note:** Make sure you create a strong password (as described on the password window). If you do not, the SQL Server Express installation fails.

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5. Click **OK** to install SQL Server Express.
6. If you are installing the .NET Framework, the Microsoft .NET Framework Setup window displays. Read and accept the License agreement and click **Install**.
7. When the installation finishes, click **Exit**, and then, if needed, click **Restart Now** to restart your computer.

You are ready to install the Scribe core product.

## Installing Scribe Insight Server

When you install the Scribe Insight Server, you install the Scribe software, including the Scribe Workbench, Scribe Console, and Scribe services.

### To Install the Scribe Insight Server

1. Open the Scribe Insight folder and run **Setup.exe**. The Scribe Insight Setup window opens. At this point, both Microsoft Windows Installer and are unavailable.
2. Verify that the check box for **Microsoft SQL Express** is either cleared (if you did not install Microsoft SQL Express) or checked and unavailable (if you did install it).
3. Verify the check box for **Install Insight** is selected. If desired, select **Insight Adapters**.
4. Click **Start Installation**. The Scribe Insight Setup Wizard displays. Click **Next**.
5. Read and accept the terms of the license agreement, then click **Next**.
6. Select **Insight Server**. By default, Scribe is installed in C:\Program Files\Scribe.
7. If you want to modify where the installation directory is located, click **Change**, specify a new destination folder, and click **OK**.

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**Note:** If installing on a 64-bit system, do not change the installation directory. Changing the directory may cause the application to fail.

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8. Click **Next**. The Ready to Install the Program window displays.
9. Click **Install** to begin the installation.
10. Follow the prompts to install the various components. When needed, read and accept the license agreements.
11. When the installation completes, click **Finish** to close the Setup Wizard Completed window.

## Setting up the Scribe Database

When the installation completes, the Scribe Database Setup window displays.

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### Notes:

You can install the Scribe Internal Scribe database on any supported SQL Server instance (local or remote) that Scribe Insight can access.

This section describes installing Scribe for the first time and assumes that you do not have an existing Scribe Internal database. For information about connecting to an existing database, see Section [6 Updating Your Scribe Products](#).

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### To create the Scribe Internal Database

1. Select **Create a Scribe Internal database on SQL Server** and click **Next**.
2. From the Create the Scribe Internal database on SQL Server window, specify:
  - **Authentication**
  - **Database Information**

For information about SQL Server Authentication methods, see the [Scribe Help Library](#).

If you do not select the Scribe Instance (Server) from the Database Information dropdown list, the Database Name defaults to SCRIBEINTERNAL.
3. If you selected SQL Server authentication, enter either the password for the SA user you created when you installed SQL Server Express or the SA password for your SQL Server installation.

For information about using Windows authentication, see Section [7 Installing Scribe with Windows Authentication](#).
4. Optionally, click **Database Settings** to display the Internal Database Settings window. If desired, change:
  - Data file location
  - Transaction log file location
  - If using SQL Authentication, use the Scribe InternalDB.exe utility to change the password for the SCRIBE user for security reasons. The default password is **integr8!**. Changing the password directly in SQL Server may cause your Scribe Insight server to stop working.
5. Click **Next**. An informational message appears.

6. Click **OK**. The Create Scribe Sample Database window displays.
7. Do one of the following:
  - Click **Yes** to create a sample database. In the Create the Scribe Sample Database window, enter your SA password and click **Next**. Scribe creates the sample database.
  - Click **No** to continue without creating a sample database.
8. Click **Finish** to finish installing Scribe, or, if you are not installing adapters at this time, click **Exit** to close the Scribe Insight Setup window.
9. Configure Scribe before you begin to use it. The configuration steps are described in Section [4 Configuring Scribe Insight](#).

## Schema Validation of Scribe Internal Database

After the Scribe Insight installation or update procedure finishes, the Schema Validator utility runs to validate the Scribe Internal Database and verify that it has no errors or problems.

- If the Scribe Internal Database is valid, the following success message is returned. Click **OK** to exit.

The Scribe Internal Database was validated.
- If the Scribe Internal Database is not valid, the following error message is returned. Click **OK** to review the error log. For example:

4 Errors were found.  
Click OK to view the error log.
- If the Schema Comparison file cannot be located or if it is corrupted, the following error message is returned. Click **OK** to exit the error. For example:

Error: Schema comparison file was not found.  
Expected: C:\ExampleDir\ExampleSubDir\ScribeInternalSchema\_7.6.2.xml
- If there is an undefined error, such as a SQL error, an error message is returned. Click **OK** to exit the error. For example:

Error: Login failed for user 'Smith'.

If any error is returned, contact [Scribe Online Support](#) for help.

When you contact Technical Support, have the following files available for the Technical Support representative to review:

- The error log file generated by the validation procedure - [DBSchemaValidator.log](#).
- The current database schema file - [DBValidatorSchema.xml](#).

## Installing Adapters

Scribe Adapters are optional programs that allow you to use Scribe to seamlessly integrate data from a number of different sources. For detailed information about adapters, see the online help for each adapter in the [Scribe Help Library](#).

### Before you begin

Scribe Software may update adapters but not update the Scribe Setup Wizard. To verify you have the latest adapter releases, check the [Scribe Insight and Adapters Downloads](#) page to see if the adapters you need are available as a separate download. If a more recent adapter release is available, download the adapter Release Notes and the Installer as described in [Installing an Adapter from the Scribe Product Downloads Page](#).

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#### Notes:

If you install an adapter from the Scribe downloads page, you do not need to install the adapter using the Scribe Setup Wizard.

While you can download and view the online help for each adapter from the Scribe Insight and Adapters Downloads page, it may be easier to view the help from the [Scribe Help Library](#). Any updates to the online help are also provided with the adapter.

Microsoft Dynamics AX and Microsoft Dynamics NAV users: Scribe adapters for Microsoft Dynamics AX and Microsoft Dynamics NAV require that you install two components. See the online help for the adapter, available online in the [Scribe Help Library](#).

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### Installing Adapters with the Scribe Setup Wizard

1. Run **Setup.exe** to open the Scribe Setup Wizard.
2. Select **Insight Adapters**.
  - If you are installing adapters as part of your initial installation, the **Adapter Installation** window displays after Scribe is installed.
  - If you are installing adapters separately from Scribe, select the **Adapters** checkbox in the Scribe Setup Wizard. When you click **Start Installation**, the Adapter Installation window displays.
3. Select the adapter(s) you want to install and click **OK**.
4. Follow the instructions for the Setup Wizard for each adapter. If you are installing multiple adapters, each Setup Wizard starts when the previous installation finishes.
5. When you have finished, click **Exit** to close the Scribe Insight Setup Wizard.

## Uninstalling Adapters with the Scribe Setup Wizard

1. In the Scribe Setup window, select **Insight Adapters** and click **Start Installation**.
2. Clear the check box for the adapter you want to uninstall and click **OK**. A warning that the Scribe services must be stopped before you uninstall an adapter appears.
3. Do one of the following:
  - If any integrations may be running, click **Cancel**, manually stop Scribe services from **Administrative Tools > Services**, and pause all integration components.
  - If you know there are no integrations running, click **OK**. Scribe stops the services and uninstalls the adapter.

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**Note:** This method is safe only when no integrations are running.

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4. When you have finished, restart the Scribe services.

## Installing an Adapter from the Scribe Product Downloads Page

If an adapter has been updated and the Scribe insight Setup Wizard has not been updated with the new adapter, a link to Release Notes and an installer for that adapter are available on the Scribe downloads page.

### To install an adapter from the Scribe Product Downloads Page

1. After the Scribe core product is installed, open the [Scribe Insight and Adapters Downloads](#) page. Open and read the Release Notes for the selected adapter.
2. Click the **Installer** for the adapter. The File Download dialog box displays.
3. Click **Save**. Save the .msi file to a location on your computer.

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**Note:** To ensure that you have a backup copy of the adapter you are using, do **not** save the file to the Adapters directory in the Installation folder.

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4. Double-click the saved **.msi** file to open the installation wizard for the adapter. Follow the directions in the wizard. Scribe installs the new adapter.
5. Click **Finish** to close the adapter's installation wizard.

## 4. Configuring Scribe Insight

After you install Scribe Insight, there are several steps required before Scribe Insight runs properly. This section describes the registration, setup, and configuration steps.

### Registering Scribe

Before you can begin using Scribe, you must register with Scribe. For this step, have your Scribe serial number available.

#### To register Scribe

1. As a user with local administrator privileges, click the **Scribe Workbench** icon on your desktop or select **Start > Scribe Workbench**.

The Scribe Registration Wizard displays. You can choose to register either online or offline.

2. Follow the directions in the Scribe Registration Wizard to register your Scribe products.

After registering, if the **Check for product updates** checkbox is selected, the Scribe Registration Wizard verifies that you have the latest releases of all Scribe products.

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**Note:** If this computer has an internet connection, keep **Check for product updates** selected (the default). This ensures that your Scribe Insight site always has the latest features and fixes.

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### Managing Access to the Scribe Console

The Scribe Console Users group is a Windows OS group that is created during the Scribe installation and controls access to the Scribe server through the Console. Any user who uses the Scribe Console must be a member of the Scribe Console Users group.

Add all local and network Windows users that you want to have access to the Scribe Console to the Scribe Console Users group.

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#### Notes:

The user who you use for the Scribe services log on must be in the Scribe Console Users group and the local administrators group.

If your site uses a proxy server, the Scribe services log on account must have access to the internet through the proxy server.

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After adding users to the Scribe Console Users group, log off the computer and log back in again.

## Managing Security Access in the Scribe Console

The Scribe Console Admins group is a Windows OS domain group that controls access to the Security Settings window of the Administration node. If a user is not a member of the Scribe Console Admins group, the Security node does not display in that user's Scribe Console tree.

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### Notes:

The Scribe Console Admins group must be defined as part of the domain user account.

You must have Scribe administrator privileges to create the Scribe Console Admins group, or to add users to this group.

To access the Scribe Console, members of this group must also be members of the Scribe Console Users group.

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After adding users to the Scribe Console Admins group, log off the computer and log back in again.

## Setting up Site Security

The Scribe Console provides access to the file system, MSMQ Message Queues, and local services. By default, access is not permitted to any of these resources. Access is only granted by exposing the resources on a per item level using the Security node (located under Administration). The Security node is available on the Console that is running as a local connection on the computer that hosts the Scribe Insight server.

### Setting File Management Security

File Management security controls access to your local file system for all users and processes. Exposing folders to the Console allows you to perform typical directory browsing as well as moving, renaming, and deleting files and folders.

#### To set file management security

1. From the Scribe Console, click your **Scribe Insight Server**. Its name will be followed by (Local). Expand **Administration** and click **Security** to display the **Security Settings** window.
2. From the **File Management** tab, select **Provide access to SELECTED folders on this server**.

3. From the program location (default is C:\Program Files), select the following folders in the **All Folders** list and add them to the **Console Shared Folders** list:
  - \*\**Public\Public Documents\Scribe\Collaborations**
  - \*\**Public\Public Documents\Scribe\Samples**
  - \*\**Public\Public Documents\Scribe\Templates**
  - \*\**Public\Public Documents\Scribe\Tracing**
  - Event file locations for any Integration Processes
  - Application path (the location of pre/post programs used in Integration Processes)
  - Any other folders that you wish to share across Collaborations
4. When you have finished, click **Save**.

---

**Notes:**

The default Application path is \Program Files\Scribe\Utilities. To change the Application path, select the **Integration Servers** node for your server, right-click, click **Properties**, and change the path in the Integration Server Properties box.

When you configure File Management security, if both a UNC and physical path appear in the All Folders dialog box, always select **UNC** (Universal Naming Convention). For example, if the All Folders dialog box opens and both C:\Temp and \\[computer name]\C\Temp, display, select **\\[computer name]\C\Temp** as the folder path.

When you return to the Console after browsing, only the file name, not the full Collaboration path, displays. This is expected behavior and no action is necessary.

---

## Setting Services Security

Services security controls the services you are allowed to use. When you expose a service to the Console, you can start, stop, pause, resume, or view the status of the service. The AdminServer service cannot be stopped or started from the console.

### To set the Scribe Services security

1. In the **Services tab**, move the five Scribe services from the **All Services** list to the **Shared Services** list:
  - **Scribe AdminServer**
  - **Scribe BridgeServer**
  - **Scribe EventManager**
  - **Scribe MessageServer**
  - **Scribe MonitorServer**
2. When you have finished, click **Save**.

## Setting Message Queue Security (Optional)

Message Queue security restricts access to queues. The Console includes a queue browser, which requires that the three default queues created during installation be enabled. This task is only required if your site is using message queues.

### To provide access to the message queues

1. In the **Message Queues** tab, move the three Scribe queues from the **Known Message Queues** to the **Shared Message Queues**:
  - **ScribeDeadMessage**
  - **ScribeIn**
  - **ScribeRetry**
2. When you have finished, click **Save**.

## Creating Alert Recipients and Groups

By default, Scribe sends alerts to members of the DB Admin and System Admin groups. For the alerts to be received, at least one recipient for each group and email server settings must be configured. To email notifications when Scribe Insight server errors occur, create the alert recipients and add them to the groups

The Scribe Insight server generates alerts at four separate levels of severity. These are:

- Critical errors
- Errors
- Warnings
- Info (informational) messages

You need to configure at least one Recipient to be notified for critical errors and errors.

---

**Important!** Configure the Administrator to receive email notifications for alerts.

---

### To configure the notification groups

1. In the Scribe Console, expand the **Administration** node. Select **Alert Recipients**
2. Click **Add** to display the Add Recipient window.
3. Add the name of the user you want to be notified.
4. In the **Notification** tab, enter at least one contact method (email, pager or Net Send) and select which notification types should be sent using this method.

---

**Note:** Send critical error and error alerts to a user who monitors the email address.

---

5. Click **Apply** to add the recipient.
6. Click the **Recipient Groups** tab and add this recipient to the **DB Admin** and **System Admin** groups.

---

**Note:** To send DB Admin and System Admin alerts to separate individuals, create a second recipient and add this recipient to the second group.

---

## Configuring Site Settings

Use Site Settings to set parameters for the entire Scribe server. To open the Site Settings window, select **Site Settings** from the **Administration** node of the Scribe Console.

### Changing the Collaboration Root Location

The default location for the Scribe Insight server files is `*\Public\Public Documents\Scribe\Collaborations`. If you change the default location:

- Select a location that is centrally accessible, if you have multiple Scribe workstations
- Use the UNC naming convention
- Verify that this folder will be regularly backed up

#### To set the collaboration root location

1. On the **General** tab, change the **Collaborations root** to the Collaboration folder under the `*\Public\Public Documents\Scribe` folder.
2. If you are using message queuing, verify that the **Site Main Queues** are correct.
3. Select the **Copy system Alerts to the Event Log** check box.
4. Click **Save** (in the upper left corner) to save your changes.

## Configuring Email Settings

Configure email settings for the mail server used to distribute the outgoing alerts. Enter values for each of the enabled fields in SMTP Configuration (outbound). Some fields will be unavailable, depending on the Login Method you select.

---

**Important!** Configure email settings so recipients such as the Administrator will receive email alerts.

---

#### To configure email settings

1. From the **Site Settings** window, select the **Email Settings** tab and enter the information required in the **SMTP Configuration** section. The information you need depends on the login method selected.
  - **From** – Name that appears as the sender for alerts.
  - **From address** – Return address that the server uses to send alerts.
  - **SMTP mail server** – Name of the server that sends these alerts.
  - **Account Name** –SMTP account used to authenticate this email address.
  - **Password** – Password for the SMTP account.
  - **SSL** (Secure Sockets Layer) – Secure link that supports an encrypted data stream.

You may need to set an authentication method along with a username and password to be used when authenticating.

2. Click **Test Send** to verify the SMTP configuration. The Scribe server sends a test email to the address entered in **From address**.
3. In the confirmation dialog, click **OK**, then click **Save**.
4. Open your email program to view the test message.

---

**Note:** POP3 configuration is required only if your site uses the Email Bridge feature.

---

## Setting the Sleep Period

Be sure that the Scribe Internal database files and the Collaboration root folder are backed up regularly. Since most backup operations lock files during the backup process, use the Sleep Period tab to specify the time period during which the server will be backed up. During this period, all Integration Processes and Monitors are disabled.

### To set the sleep period

1. On the **Sleep Period** tab, select the **Enable sleep range** check box.
2. Enter **Start Time** and **End Time** for the sleep period.

---

**Note:** Start and end times should encompass regular maintenance times.

---

3. Click **Save**.

## Starting the Notification Monitor

On initial setup, the Notification Monitor and all other monitors are paused. The Notification Monitor sends email notifications to the alert recipients.

To start the Notification Monitor:

- ▶ From the **General** tab of **Site Settings**, click **Resume**.

The Notification Monitor is set to **Active** and the button name changes to **Pause**.

## Managing other Monitors

### Starting the Monitors

During Scribe server installation, a number of Scribe system monitors are installed. After starting the Notification Monitor, start the individual system monitors.

### To start the remaining monitors

1. Expand the **Integration Server** node and select **Monitoring**.

The system monitors have an owner named System.

2. Select each system monitor and click **Resume** (or right click and select **Resume**).

---

**Note:** If you receive too much information with all monitors on, you can pause some of the monitors. However, always leave **Fatal Errors Detail** and **Rejected Rows Detail** on.

---

## Adding a ScribeIn Queue Monitor

If your site will use Message Queues, you may create an additional ScribeIn Queue monitor. A monitor on the ScribeIn Queue can track the status of messages in the queue. These messages should be picked up and processed by an Integration process within a matter of seconds. If there are messages in the ScribeIn queue that are older than an hour, there may be a significant failure which needs to be addressed.

Create the new monitor from Monitoring under the Integration Server node.

### To create the ScribeIn Queue Monitor

1. From **Monitoring**, click **Add** to create a new monitor.
2. In the **General Settings** tab, select:
  - **Monitor Type** — Queue
  - **Monitor Name** -- ScribeIn Queue Detail
3. Click **Step 2: Source Connection**, then select **Scribe Input Queue**.
4. Click **Step 3: Alert Criteria**.
5. Do one of the following to configure the alert criteria:
  - Monitor this queue to detect situations where there are greater than a certain number of messages in the queue. This number depends on the specific environment for which the integration is being developed. In some cases, this could be 10 messages, in others, it could be 100 or even 1000.  
In **Message count in queue greater than**, enter a number that is appropriate for your site, such as **50**.
  - Monitor the queue to detect situations where messages have been in the queue for longer than a specified length of time.  
In **Message duration in queue greater than**, select a number that is appropriate for your site, such as 1 Hour(s).
6. In the Alert Recipients box, use the browse button to select the Recipient or Group to Alert.
7. Click **Step 4: Monitor Interval**. In Monitoring Interval Settings set the interval to Monitor every 15 minutes.
8. Click **Step 5: Activation**. Select **Status – Active**.
9. Click **Step 6: Alerting**:
  - In **Alert Type**, select **Critical**.
  - In Alert description, enter a meaningful description (such as ScribeIn Queue Alert).
  - In Alert message, enter a meaningful message.
10. Click **Apply**.

## Creating a User for the Scribe Services

After installation, all Scribe services are set to run logged in as Local System account. The system account exposes all local resources but does not allow you to use any resources on other computers on the network.

Scribe suggests that you create a Windows account to be used by the Scribe services. This account can be set up with the necessary access on the local computer and on other computers on the network. After you create this account, change the properties on the Scribe services to log on as this account. The Scribe services operate in the security context of this restricted account.

If the Scribe processes need access to remote file servers or a network system (if, for example, the collaboration root or event files are located on another server), you must set up a specific user account that has access to the remote files and run the Scribe services under this user.

## 5. Installing Scribe Workstation

Scribe Workstation allows you to install the Scribe Console and Scribe Workbench on a workstation that connects to the Scribe server. After you install Insight Server, install Insight Workstation on other computers and connect to the Scribe Insight Server.

### To install Scribe Workstation

1. Verify that all prerequisites have been met. See [Installation Prerequisites](#) on page 3.
2. Open the **Scribe** folder and click **Setup.exe** to open the Scribe Insight Setup Wizard. Click **Next**.
3. Read and accept the terms of the license agreement, and click **Next**. The Scribe Insight Setup Wizard displays, enabling you to select the products you want to install and the installation location.
4. From the Product Selection and Destination window, select **Insight Workstation**. Click **Next**.
5. Click **Start Installation**. Click **Next**.
6. Read and accept the terms of the license agreement, and click **Next**.
7. The **Ready to Install the Program** window displays. Click **Install** to begin the installation.
8. Follow the prompts to install the various components. When needed, read and accept the license agreements.
9. When the installation completes, click **Finish**. The Scribe Insight Setup Wizard closes.

### To connect to the Scribe Database

1. From the Scribe Database Setup Wizard, select **Connect to an existing Scribe Internal database on SQL Server**, and click **Next**.
2. Enter the database server and database name that you used when creating the Scribe Internal database.
3. Select the authentication mode for SQL Server (see [Selecting and Preparing an Authentication Method](#)). If you are using SQL Server authentication, use the default.
4. To validate that the connection to the database is live, click **Test Connection**.
5. Click **Next**. An informational message appears.
6. Click **OK**.
7. Do one of the following:
  - Click **Finish** to finish the Scribe Workstation installation.
  - Click **Exit** to close the Scribe Insight Setup Wizard without completing the installation.

For information about installing adapters, see [Installing Adapters](#). You need to install the same adapters on the Scribe Server and Workstation.

## 6. Updating Your Scribe Products

When you install Scribe, an Update application installs that alerts you when there are new software updates for your installed products. When you receive an alert, review the related Release Notes for information about whether you should upgrade your site and for details about the upgrade process.

If your Scribe Insight server is connected to the internet, the Scribe update application runs once every 24 hours. If an update is available, the Scribe icon in the Windows notification area is flagged.

Icon	Meaning
	All installed Scribe products are up-to-date.
	One or more Scribe products have an available update.
	Your computer is checking the Scribe product update list.

### To view updates

1. Right-click the **Scribe** icon in the Windows notification area and select **Show Available Updates**.

---

**Note:** When Scribe detects updates, the right-click menu includes a Show Available Updates command. After you update Scribe, the right-click menu changes to Check for Updates until a new update is detected.

---

The [Scribe Insight and Adapters Downloads](#) page opens in your browser, listing all of the installed products for your serial number.

2. Note which products have updates available and review the Release Notes and installation instructions for those products.

---

#### Notes:

Administrator privileges are required to install Scribe products.

You can run the update service manually by right-clicking the **Scribe Update** icon () in the Windows notification area and selecting **Check for Updates**.

---

### To install updates

- ▶ In the Windows notification area, right-click the **Scribe Update** icon () and select **Show Available Updates**.

## Disabling the Update Application

If your Scribe Insight server is installed on a computer that is not connected to the internet, you may want to remove the Update application from your Startup menu. If it remains on the Startup menu, the update application generates an error every time the service runs (once a day).

### To disable the update application

1. If the **Scribe** icon is visible in the Windows notification area, right-click the icon and select **Exit** from the menu.
2. Select **Start > All Programs > Startup**.
3. Right-click the **Scribe.UpdateService** shortcut and select **Delete**. The Update application still exists, but no longer runs automatically when the computer starts and does not check for updates.

## Changing Installed Components

Use the Scribe Insight Setup window to install adapters and other components in addition to installing Scribe. After you install Scribe the first time, you can rerun the setup procedure to add adapters, as described in [Installing Adapters](#) on

Installing Adapterspage 14, as well as making other changes to your Scribe installation.

# 7. Installing Scribe with Windows Authentication

## Windows Authentication Overview

Depending on your requirements, you may decide to set up Scribe to use Windows Authentication for controlling access to the Scribe Internal database.

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**Note:** If you are installing Insight with any edition of Microsoft SQL Server 2012, you must perform the following procedure. For other SQL Server versions, this step may be optional, depending on your implementation.

---

The basic steps for installing Scribe with Windows Authentication are:

1. Before installing Scribe, set up a principal in SQL Server that has the proper rights.
2. Log in as that principal and install Scribe.
3. When you create the Scribe Internal database, select **Windows authentication**.
4. In SQL Server, set up all principals that will be using Scribe.
5. Edit the properties of the Scribe services to log on as a principal with proper rights.

## Setting up a Principal with Database Create Privileges

In SQL Server, set up a principal that has the privileges to create a database. When you install Scribe, you will log in as this principal.

Scribe recommends that you use the SQL Server pre-defined role, **dbcreator**, for this purpose. See your SQL Server documentation for information about adding Windows users to SQL Server.

## Installing Scribe with Windows Authentication

This section describes the steps that differ from installing Scribe with SQL Server authentication.

### To install Scribe using Windows Authentication

1. Log in as the Windows domain user you set up as the principal in SQL Server in the previous steps.
2. Verify that this user is in the local Administrators group on the server where you will install Scribe.
3. Run **Setup.exe** to start the Scribe Insight Installation wizard.
4. Follow the installation steps as described in Section [3](#) Installing Scribe Insight Server.
5. When prompted to create the Scribe Internal Database, select **Windows authentication using the network login ID**.

## Setting up Principals that use Scribe

Each time the Workbench or Console is started, it connects to the Scribe Internal database. When using Windows Authentication, you must set up principals in SQL Server for each Windows user who uses Scribe, and set up a principal for Scribe services. These principals authenticate the user and allow them to access the Scribe Internal database.

### To add a principal with proper access to the Scribe Internal database

1. Open SQL Server and verify that the principal is associated with the Scribe Internal database (SCRIBEINTERNAL).
2. Ensure that the principal has the following permissions to the SCRIBE schema in the Scribe Internal database :
  - **Select**
  - **Insert**
  - **Update**
  - **Delete**
  - **Execute**
  - **Alter**

---

**Note:** You can simplify this process by using the SQL Server predefined role, **dbowner**, for this purpose. Refer to your SQL Server documentation for more information about granting permissions to a schema.

---

3. Verify that the principal has access to other resources required by Scribe, such as MSMQ, .dts files, and so on.

## Editing Scribe Services Properties

The Scribe services allow Scribe to run without requiring that someone actually be logged on to the integration server. When the Scribe services are installed, they are configured to log on as the local system account. When using Windows Authentication, these services must be set up to log on as a Windows principal that has privileges to access the Scribe Internal database.

### To edit the properties of the Scribe Services

1. Start the Windows Services applet.
2. Click the **Log On** tab.
3. Edit the properties so that the service logs on as the principal you set up for it.
4. Repeat the process for each of the Scribe services:
  - **Scribe AdminServer**
  - **Scribe BridgeServer**
  - **Scribe EventManager**
  - **Scribe MessageServer**
  - **Scribe MonitorServer**

## 8. Configuring a Two-Node Scribe Insight Server Failover Cluster

When running in Windows Server 2008 R2, Scribe Insight can be configured for high availability with Microsoft Clustering Services. A Scribe Insight Server failover cluster appears as a single Scribe Insight server instance and is configured to access shared MSMQ queues, a shared disk, as well as Scribe services. For more information on configuring a Microsoft failover cluster in Windows Server 2008 R2, see the MSDN article, [Creating a Cluster in Windows Server 2008](#).

---

**Note:** If you want to use failover, you must verify that UAC is not enabled.

---

### Installation Steps Overview

This section provides an overview of the steps to install Scribe in a Windows 2008 R2 failover cluster environment. Each step is described in greater detail in this chapter.

- Install and configure Scribe on Node 1:
  - Log into Node 1 with an account that has appropriate privileges.
  - Install Scribe on Node 1:
    - ◆ Create, configure the Scribe Internal Database with Windows Authentication
    - ◆ Copy SQL scripts into the Scribe directory
    - ◆ Configure the Scribe Services account
    - ◆ Add the Scribe Service account and Scribe Console user(s) to the Scribe Console Users Group
  - Log off and log in as a user in the Scribe Console Users Group
  - Register Scribe in Scribe Workbench and close the Workbench
  - Move the Collaborations folder to the shared Cluster Disk
  - Configure the shared Collaborations folder and MSMQ settings in the Console
  - Change the Scribe Insight server name from the local machine name of Node 1 to the network name of the Scribe cluster instance
  - Re-register Scribe Workbench
- Install and configure Scribe on Node 2:
  - Log in to Node 2 with an account that has appropriate privileges
  - Install Scribe on Node 2:
    - ◆ Connect to the Internal Database using Windows Authentication Account
    - ◆ Configure the Scribe Services
    - ◆ Add the Scribe Service account and Scribe Console user(s) to the Scribe Console Users Group
  - Log off and log in as a user in the Scribe Console Users Group
  - Configure the Scribe cluster to run Scribe Insight
  - With Node 2 as current owner, bring the Scribe cluster online
  - With Node 2 as current owner, take the Scribe cluster offline

- Run the failovermove.sql script against the Scribe internal database
- Register Scribe via Scribe Workbench and close the Workbench
- Bring the Scribe cluster online
- Open the Console, delete the local site, add network site (Client Access Point Network Name)
- Take the Scribe cluster offline
- Move the Scribe cluster and test it:
  - Move the Scribe cluster to Node 1
  - Bring the Scribe cluster online
  - Delete the local site, add a network site (use the network name for the Scribe cluster instance)
  - Test

## Prerequisites

This document assumes you have access to an existing failover cluster that has been properly configured and validated using Microsoft's Validate a Configuration wizard.

You install Scribe Insight separately on both nodes in the cluster. When you install Scribe on Node 1, you create a Scribe Internal Database. Your logged-on user needs dbcreator privileges on the SQL Server where the database is created.

---

**Note:** Windows Authentication for SQL Server is required for a Scribe Failover Cluster configuration.

---

- Verify that you have privileges to install on the servers and configure the cluster to work with Scribe.
- Create a Scribe Service domain user account to run Scribe Services with:
  - Local Administrator privileges on both server nodes of the cluster.
  - Membership in the Scribe Console Users Group (created during installation).
- In SQL Server, you must be able to grant Scribe Internal Database datareader and datawriter privileges to the Scribe Console Users Group Active Directory group.
- You must also be a member of the Scribe Console Admins group.
- Verify no RDP sessions are connected to either server node before installing Scribe Insight.
- Close any open RDP sessions before deploying Scribe.
- In addition to Scribe Services, the Scribe failover cluster requires these resources:
  - Domain account to administer the cluster.
  - Two Windows Server 2008 R2 failover cluster nodes.
  - Network name for the Scribe failover cluster instance.
  - IP address.
  - Shared Cluster disk to be used for the Scribe Collaboration folder. Scribe recommends that this be a different disk than the Cluster Quorum disk.
  - MSMQ.

# Installing and Configuring Scribe on Node 1

## Installing Scribe Insight on Node 1

Be sure that Scribe installation paths are identical on both nodes of the cluster.

### To install Scribe Insight

1. Log into Node 1 with an account that has privileges to create the Scribe Internal Database using Windows Authentication.
2. From the **Scribe Installation** folder, run **setup.exe**.
3. Follow the directions to ensure that all required components are installed.
4. After the prerequisites have been met, install **Scribe Insight**.
5. Do not select anything on the Optional Components window; click **Next**.
6. Click **Install** on the Ready to Install window to begin the installation.
7. After Scribe Insight has successfully installed, click **Finish**.

## Creating and configuring the Scribe Internal Database on Node 1

When the Scribe Insight installation completes, the Scribe Database Setup window appears.

### To create a database

1. From the Scribe Database Setup window, keep the default **Create a Scribe Internal Database on SQL Server** selected and click **Next**.
2. Select **Windows Authentication** as the authentication method.
3. Select the **Database Instance (SQL Server) Name** from the drop-down list or type it in manually.
4. Use the default (SCRIBEINTERNAL) or enter your own database name for the Scribe Internal Database. Click **Next**.

---

**Note:** If there is an existing SQL user named SCRIBE on the SQL Server, the SCRIBE user's password is reset to the default integr8!.

---

5. Read and accept the Windows Authentication license agreement. Click **Next**.
6. Do one of the following:
  - Click **Yes** to create a Scribe Sample Database for training and tutorials.
  - Click **No** to continue without creating a Sample Database.
7. When the database setup completes, click **Close**.

---

**Note:** You must grant the datareader and datawriter privileges on the Scribe Internal Database to the **Scribe Console Users Group** Active Directory group.

---

8. If you are not installing adapters now, click **Exit**. You can install adapters after completing the Scribe Insight installation and configuration.

## Copying SQL scripts to the Scribe directory

Windows 2008 Failover requires that you move two SQL scripts in the default Scribe directory (C:\Program Files (x86)\Scribe\):

- For Scribe 7.0.1 or later, the ChangeScribeServer.sql and FailoverMove.sql files are located in the ..\Program Files\Scribe\Failover\ directory. Copy these files from this folder into the default Scribe directory.
- For Scribe 7.0.0, download these two SQL scripts from OpenMind from the Scribe Software website to the default Scribe directory:
  - <https://openmind.scribesoftware.com/download/FailoverMove>
  - <https://openmind.scribesoftware.com/download/ChangeScribeServer>

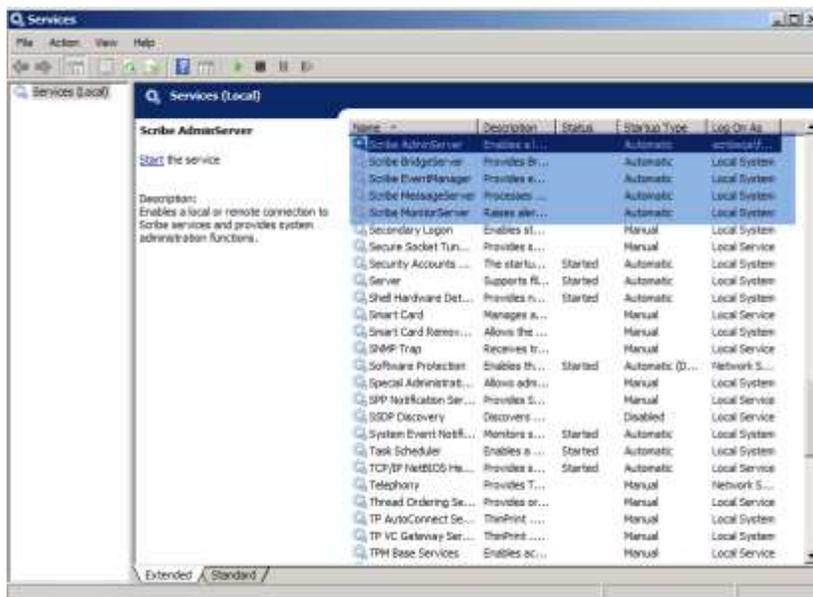
---

**Note:** ChangeScribeServer.sql already exists in the Scribe directory. Click **Yes** when prompted if you should overwrite the existing file.

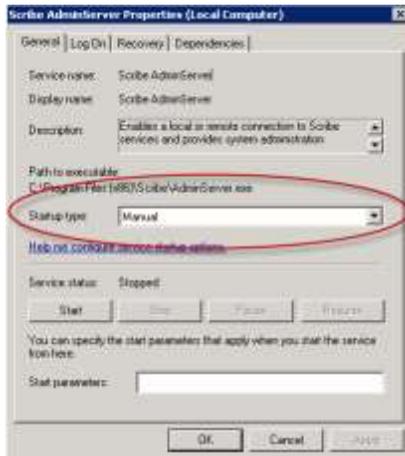
---

## Configuring Scribe Insight Services

1. From the **Microsoft Services** applet on Node 1, configure each of the five Scribe services:
  - **Scribe AdminServer**
  - **Scribe BridgeServer**
  - **Scribe EventManager**
  - **Scribe MessageServer**
  - **Scribe MonitorServer**



- For each Service, set **Startup Type** to **Manual** on the General tab:



- Open the **Log On** tab and select **This account**. Enter the name and password of the Scribe Services account. For example:

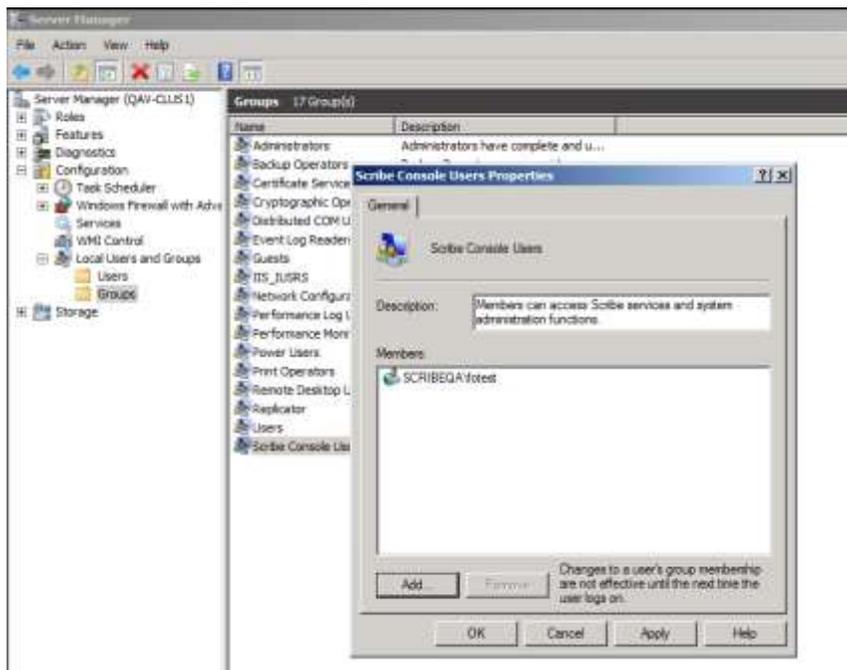


## Adding accounts to the Scribe Console Users Group

The next step is to ensure that the Scribe Service account and any other users that require access to the Scribe Console are registered in the Scribe Console Users Group.

### To add Windows accounts to the Scribe Console Users Group

1. Open the Server Manager.
2. Browse to **Configuration > Local Users and Groups > Groups**.
3. Select **Scribe Console Users Group**.
4. Add the **Scribe Service** account and any other users that require access to the Scribe Console.



5. Log off and log in to the Node 1 as a user in the Scribe Console Users Group.

---

**Note:** The Scribe Services account must also have datareader and datawriter access to the SCRIBEINTERNAL database.

---

## Registering Scribe

Register Scribe using a Professional or Enterprise license key that supports your clustered failover environment.

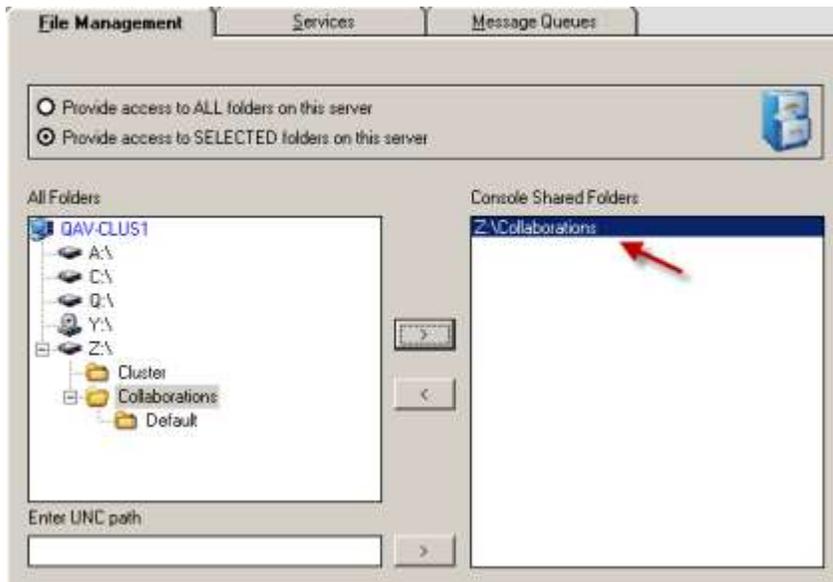
### To register Scribe on Node 1

1. Open Scribe Workbench and complete the registration wizard.
2. Close Scribe Workbench.

## Configuring Settings in Scribe Console

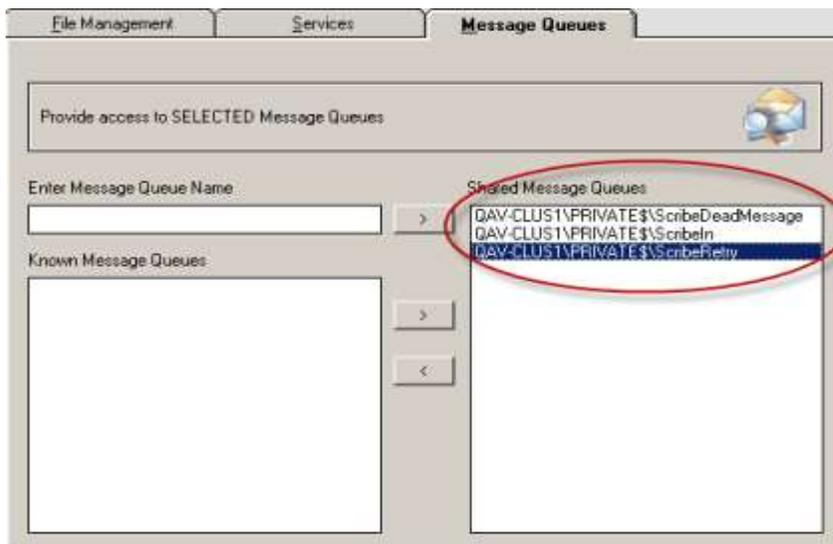
### To move and configure the Collaborations folder

1. Move the **Collaborations** folder to a shared drive that is accessible by both nodes in the cluster. The default Collaborations folder is installed under \*\Public\Public Documents/Scribe.
2. Open **Scribe Console**.
3. Go to the File Management tab of the Security Settings window (**Site Name > Administration > Security**). Move the **Collaborations** folder to the **Console Shared Folders**. Click **Save**.



### To configure Shared Message Queues

1. Select the **Message Queues** tab and move the **ScribeDeadMessage**, **ScribeIn**, and **ScribeRetry** queues to **Shared Message Queues**. Click **Save**.



2. Close the Console.

## Manually Stopping Scribe Services

At this point in the installation procedure, Scribe Services must be manually stopped, using the procedure described in this section.

Stopping services helps to avoid resource contention, which can result in performance problems among the failover nodes.

### To stop Scribe Services

After you have finished configuring Shared Message Queues, close all Scribe applications and stop all Scribe services on all systems that are used in your integration.

1. In the Windows Services dialog box, locate the **Scribe Services**.
2. Stop each service in the following order:
  - **Scribe MonitorServer**
  - **Scribe MessageServer**
  - **Scribe EventManager**
  - **Scribe BridgeServer**
  - **Scribe AdminServer**

---

**Note:** You may receive an error message if you do not stop Scribe Services in the recommended order.

---

## Changing the Scribe Insight server name

Change the Scribe Insight server name from the local node name to the network name for the cluster failover instance.

### To change the Scribe Insight server name

1. Run **InternalDB.exe** from the Scribe installation directory (C:\Program Files (x86)\Scribe\InternalDB.exe).
2. Click the **Internal Database** tab. To validate that the connection to the database is live, click **Test Connection**.

---

**Note:** If it is enabled, click **Update Internal Database**. After the Internal Database has been upgraded, click **Test Connection** again.

---

3. Click **Move Internal Database**.

4. In the **Change Scribe Insight** section, make the following changes:
  - a. **Old Scribe Server Name:** Enter the local computer name. Verify that this name is spelled correctly and typed in all uppercase letters.
  - b. **New Scribe Server:** Enter the Scribe cluster network name that you will define later in the installation process, when you create the [Scribe Cluster Network](#).

---

**Notes:**

The Scribe server name must be in all uppercase letters.

To ensure that the Scribe MessageServer works correctly, the Scribe server name can be no longer than 15 characters.

Be sure to write down the new name for later use.

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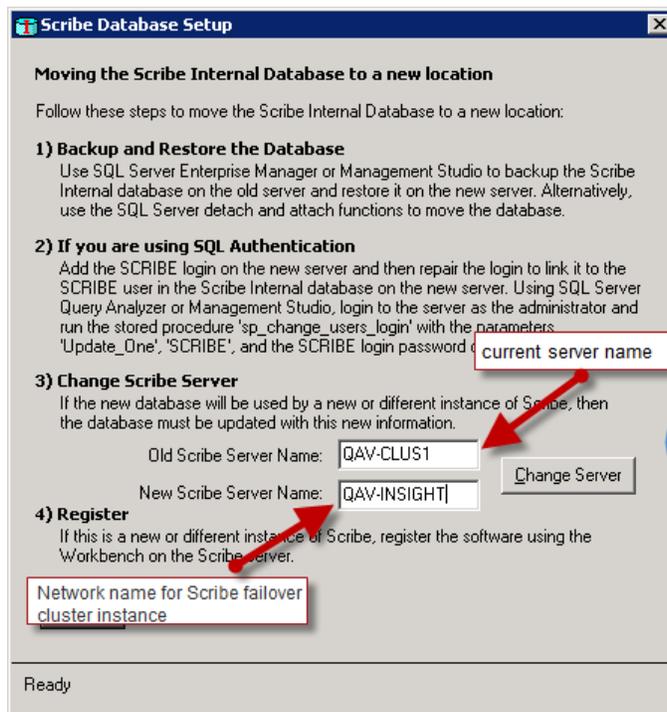
- c. Click Change Server.
- d. Click **OK**.

---

**Note:** The New Scribe Server Name reflects the network name that you will give to the [Scribe failover cluster instance](#).

---

- e. Click **Back** and **OK** to close the dialog box.



## Re-register Scribe

You must register Scribe again to use the network name of the Scribe cluster instance.

1. Open Scribe Workbench and complete the registration wizard using your Scribe Professional or Enterprise license key.
2. Close Scribe Workbench.

## Installing and Configuring Scribe on Node 2

### Installing Scribe Insight on Node 2

Be sure that Scribe installation paths are identical on both nodes of the cluster.

#### To install Scribe on Node 2

1. Log into Node 2 with an account that has privileges to connect to the Scribe Internal Database using Windows Authentication.
2. From the **Scribe Installation** folder, run **setup.exe**.
3. Follow the directions to ensure that all required components are installed.
4. After the prerequisites have been met, click **Start Installation**.
5. Click **Next** on the Optional Components window without selecting anything.
6. Click **Install** on the Ready to Install window to begin the installation.
7. After Scribe has installed successfully, click **Finish**.

### Connecting to the Scribe Internal Database

After installing Scribe Insight on Node 2, connect Node 2 to the database you created when you set up Node 1.

#### To connect to the Scribe Internal Database

1. From the Scribe Database Setup window, select **Connect to an existing Scribe Internal Database on SQL Server**, and click **Next**.
2. Enter the **database server** and **database name** that you used when creating the Scribe Internal Database during the installation process on Node 1.
3. Select **Windows Authentication** as the SQL Server authentication mode.
4. To validate that the connection to the database is live, click **Test Connection**.
5. Click **Next** and **Close** to exit the Scribe Database Setup utility

## Configuring the Scribe Services account on Node 2

1. From the **Microsoft Services** applet, configure each of the five Scribe services. The Scribe Services are:
  - Scribe AdminServer
  - Scribe BridgeServer
  - Scribe EventManager
  - Scribe MessageServer
  - Scribe MonitorServer
2. For each Service, set **Startup Type** to **Manual** on the General tab.
3. Open the **Log On** tab and select **This account**. Enter the name and password of the Scribe Services account.

## Adding the Scribe Service account to the Scribe Console Users Group on Node 2

Ensure that the Scribe Service Windows account, and any other users that require access to the Scribe Console are registered in the Scribe Console Users Group.

### To add the Scribe Service account to the Scribe Console Users Group

1. Browse to **Server Manager > Configuration > Local Users and Groups > Groups**.
2. Select **Scribe Console Users Group**.
3. Add the **Scribe Service Windows** account and any other users that will require access to the Scribe Console.
4. Log off and log in to the server as a user in the Scribe Console Users Group.

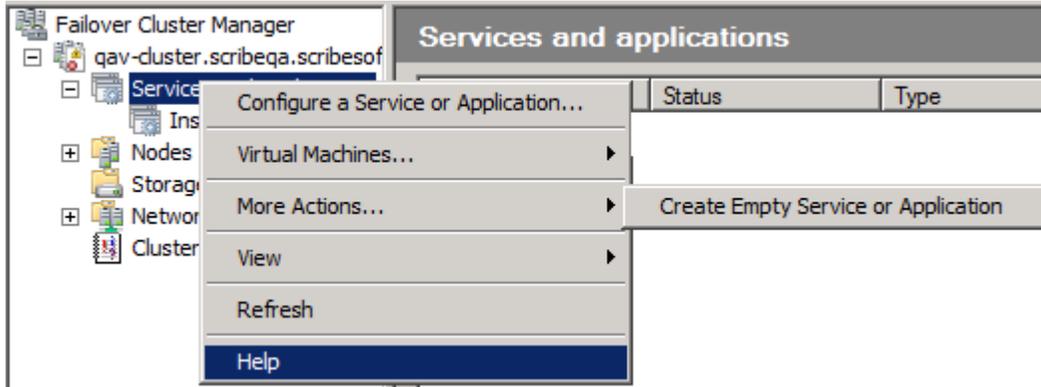
## Configuring a Cluster to run Scribe

Add Scribe to a cluster using the Failover Cluster Manager Console. You need to add:

- A network name for the Scribe failover cluster instance
- A shared disk
- The five Scribe Services
- MSMQ

## To create and configure the Scribe Insight cluster

1. Select **Start >Administrative Tools >Failover Cluster Manager** to open the Failover Cluster Manager Console.
2. Right-click **Service and Applications** and select **More Actions > Create Empty Service or Application** to create a Generic Application.



3. Right-click **New service or application** and select **Properties**.
4. On the **General** tab, change the **Name** to Scribe Insight and select the preferred owner of the cluster, then click **OK**.



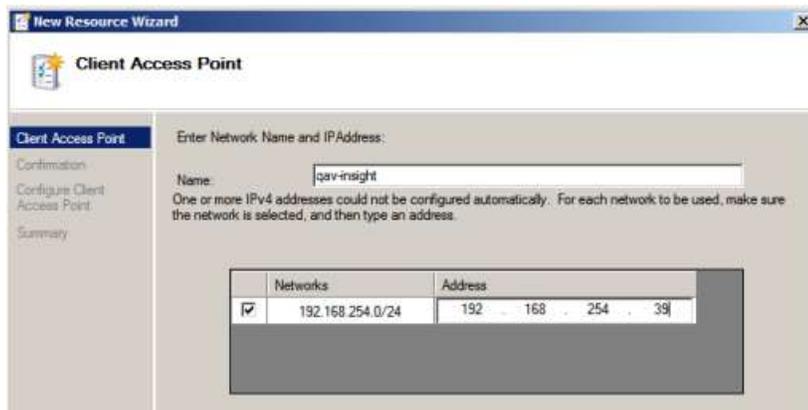
5. In the Failover Cluster Management Console Services and Applications window, right-click **Scribe Insight** and select **Add a resource > 1 – Client Access Point**.

6. Enter a **Network Name** and **IP Address** for the Scribe cluster instance. Click **Next**.

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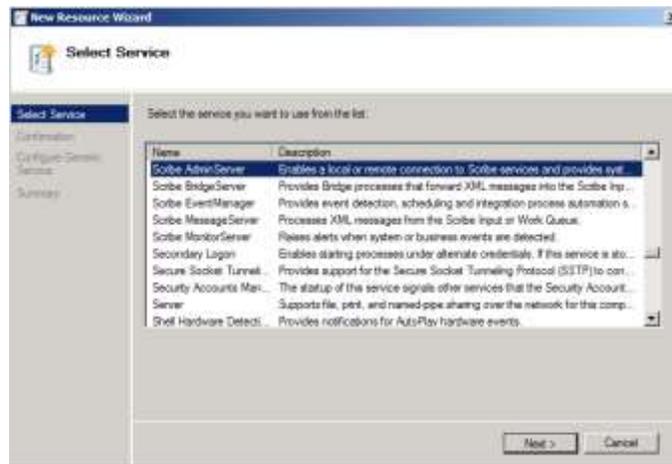
**Note:** To ensure that the Scribe MessageServer works correctly, the Scribe server name can be no longer than 15 characters.

---



7. From the Services and Applications window, right-click **Scribe Insight** and select **Add a resource > 4 – Generic Service**. Add all five Scribe Services:

- **Scribe AdminServer**
- **Scribe BridgeServer**
- **Scribe EventManager**
- **Scribe MessageServer**
- **Scribe MonitorServer**



8. Right-click **Scribe Insight**, click **Add storage** and select the disk(s) to use with the Scribe Failover Cluster.
9. From the Services and Applications window, right-click **Scribe Insight** and select **Add a resource > More Resources > 8 – Add Message Queuing**.

---

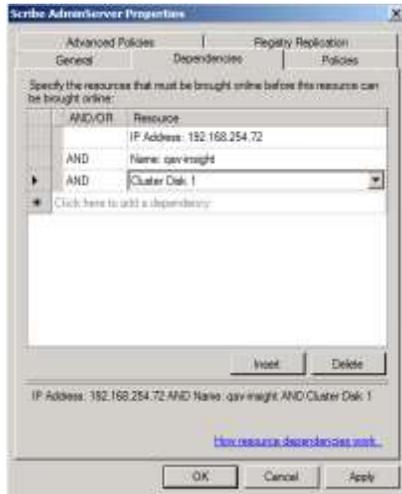
**Note:** Be sure to add the **Shared Disk**, **IP Address**, and **Network Name** as dependencies for MSMQ to work properly.

---

10. Right-click and select **Properties** for all **Other Resources** listed for the Scribe Insight Application. Change the Scribe services as follows:

### Scribe AdminServer

- On the **Dependencies** tab, add the Shared Disk, IP Address and the Scribe Virtual Server Name, click **Apply**.



- ◆ On the Registry **Replication** tab, enter the following registry keys:

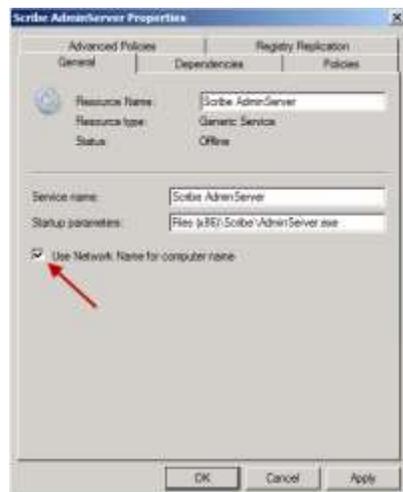
- ◇ **SOFTWARE\Wow6432Node\ODBC**



- ◇ **SOFTWARE\Wow6432Node\Scribe**



- ◆ On the General tab, select the **Use Network Name for computer name** checkbox:



### **Scribe BridgeServer**

- On the **Dependencies** tab add the Shared Disk, IP Address, Scribe Virtual Server Name, MSMQ, and Scribe AdminServer, click **Apply**
- On the **General** tab, select the **Use Network Name for computer name** checkbox

### **Scribe EventManager**

- On the **Dependencies** tab add the Shared Disk, IP Address, Scribe Virtual Server Name, and Scribe AdminServer, click **Apply**
- On the **General** tab, select the **Use Network Name for computer name** checkbox

### **Scribe MessageServer**

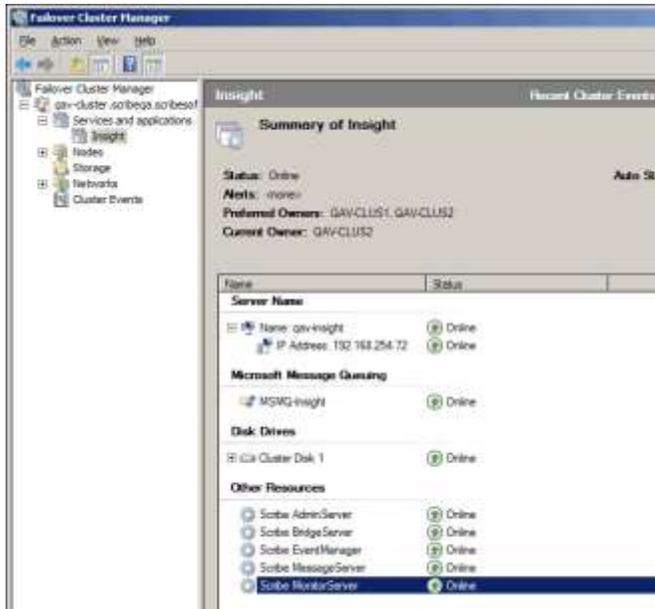
- On the **Dependencies** tab, add the Shared Disk, IP Address, MSMQ, Scribe EventManager, Scribe Virtual Server Name, and Scribe AdminServer, click **Apply**
- On the **General** tab, select the **Use Network Name for computer name** checkbox Scribe MonitorServer

### **Scribe MonitorServer**

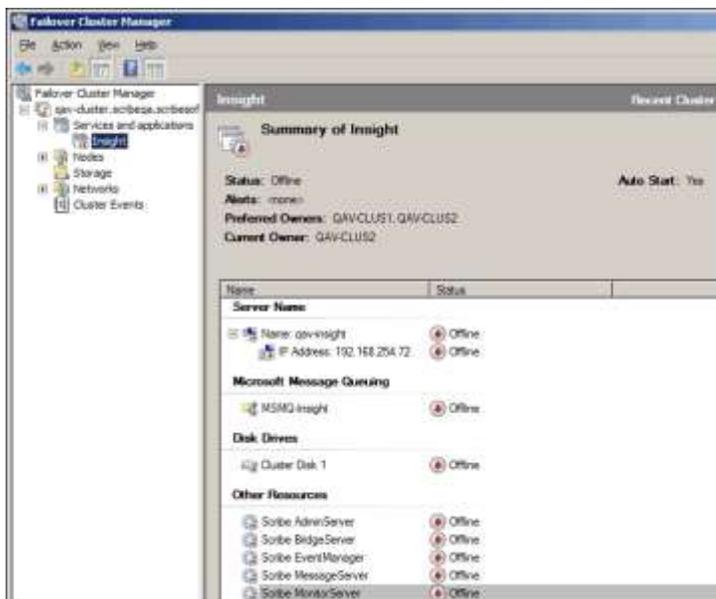
- On the **Dependencies** tab add the Shared Disk, IP Address, Scribe Virtual Server Name, and Scribe AdminServer, click **Apply**
- On the **General** tab, select the **Use Network Name for computer name** checkbox

## Taking the Scribe Cluster online and offline

1. Verify that **Node 2** is selected as the current owner.
2. On the Failover Cluster Management window, right-click **Scribe Insight Application** and click **Bring this service or application online**.



3. Right-click **Scribe Insight** and click **Take this service or application offline**. Confirm the action to Take Scribe Insight Offline.



## Running the FailoverMove.sql script

1. Open SQL Server Management Studio
2. Execute the **FailoverMove.sql** script against your Scribe Internal Database.

## Registering Scribe on Node 2

Open Scribe Workbench and register Scribe using your Professional or Enterprise license key. Be sure to close Scribe Workbench when you are done.

## Adding the network site to Scribe Console for Node 2

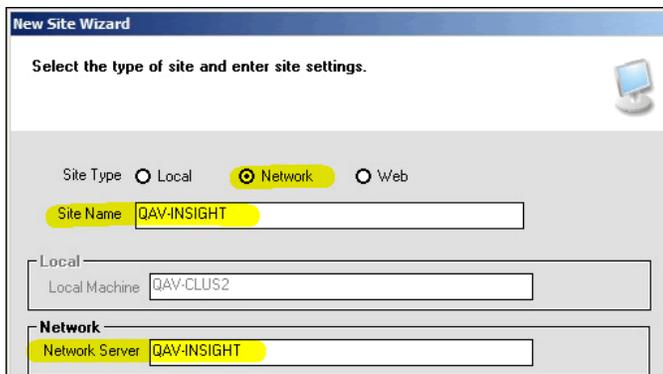
After the Cluster has been established, delete the local site and add a network site pointing to the network name of the Scribe cluster instance.

### To add the network site to Scribe Console

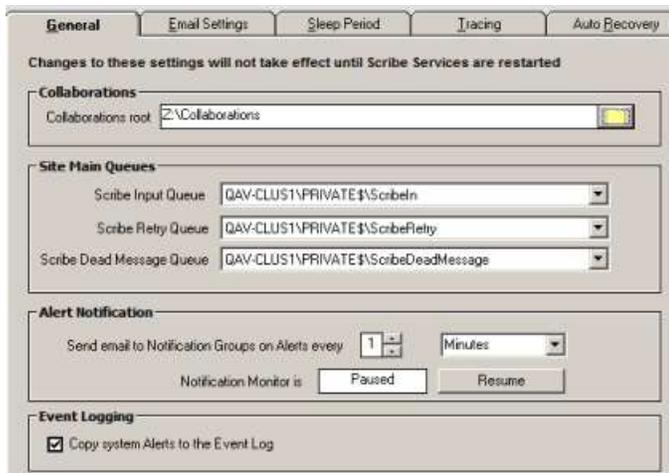
1. Bring the Scribe Cluster back online.
2. From the Scribe Console, right-click the site name in the Console Root and click **Delete site**.

**Note:** If there is no site in the Console Root to delete, proceed to the next step.

3. Right-click the **Scribe Console** icon in the Console Root and click **Add New Site**.
4. Use the New Site Wizard to add the new network site. Enter the network name for the Scribe cluster instance in the **Network Server** field.



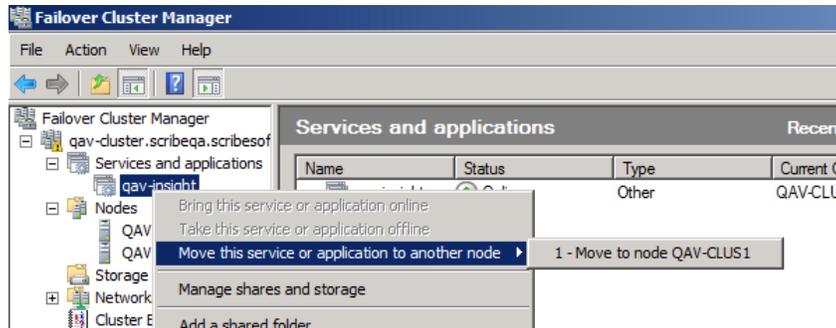
5. When you are done, click **Finish**. The Scribe Console opens.
6. Select **Site Name > Administration > Site Settings** and configure the Collaborations root directory and Site Main Queues. Click **Save**.



7. Take the Scribe cluster offline.

## Moving and Testing the Scribe cluster

1. From Failover Cluster Management Console, move the **Scribe cluster instance** to Node 1.



2. Bring the Scribe cluster instance online.
3. Delete the local site and add a network site to Node 1:
  - a. From the Scribe Console, right-click the site name in the Console Root and click **Delete site**.
  - b. Right-click the **Scribe Console** icon in the Console Root and click **Add New Site**.
  - c. In the New Site Wizard, add the new network site using the network name for the Scribe cluster instance. When you are done, click **Finish**.
4. Test the Scribe cluster by creating an integration process in Scribe Console and moving the application from one node to the other. Verify that the process continues to run when the current owner changes.

## Upgrading Scribe Insight in a Failover environment

1. Take the Scribe Cluster Service offline as described in [Taking the Scribe Cluster on- and offline](#).
2. Log into **Node 1**.
3. On Node 1, run the Insight installer for the latest version of Insight as described in [Installing Scribe Insight on Node 1](#). After the installation completes:
  - a. Open Scribe Workbench and re-register as described in [Re-registering Scribe](#)
  - b. Close Scribe Workbench.
4. Log into **Node 2** and run the Insight installer on Node 2. When the installation completes, open and close Scribe Workbench.

---

**Note:** Because you registered when installing on Node 1, you should not be requested to register again.

---

5. Bring the Scribe Cluster Service back online.

Your Scribe Insight installation is complete.

## 9. Installation Checklist

This section provides an installation checklist for Scribe using the most common features. This section does not address installing:

- Scribe with the failover feature
- Scribe Workstation
- Scribe under unusual circumstances

For more information, see the remainder of this document or contact your Scribe reseller for more information.

Step	Task	Page	✓
<b>Prepare SQL Server</b>			
1	Determine where the SQL Server database for Scribe will reside.		
2	Check your SQL Server version and verify its compatibility with Scribe (see the Scribe Release Notes for supported versions of SQL Server).  If you do not have SQL Server set up, you can install SQL Server Express Edition, included with the Scribe installer.	<a href="#">3</a>	
3	Configure the authentication method for SQL Server <ul style="list-style-type: none"> <li>▪ For SQL Server Authentication</li> <li>▪ For Windows Authentication</li> </ul>	<a href="#">4</a> <a href="#">8</a> <a href="#">28</a>	
<b>Installation Steps</b>			
<b>Install Scribe Software</b>			
1	Download and unzip the Scribe installer. <b>Note:</b> If using Windows authentication, log in as the user you created for this purpose (the Windows domain user that is a SQL Server principal with dbcreate rights).	<a href="#">10</a>	
2	Run <b>Setup.exe</b> to open the Scribe Insight Setup window.	<a href="#">10</a>	
3	Verify the following prerequisites are installed: <ul style="list-style-type: none"> <li>▪ Microsoft Windows Installer 3.1</li> <li>▪ Microsoft .NET Framework 4.0</li> <li>▪ Microsoft SQL Express 2012 (optional)</li> </ul>	<a href="#">10</a>	
4	After installing prerequisites, restart your computer.		
5	Run <b>Setup.exe</b> again and select <b>Install Insight</b> .	<a href="#">11</a>	

Step	Task	Page	✓
6	At the <b>Product Selection and Destination</b> window, select <b>Insight Server</b> .	<a href="#">Error! Bookmark not defined.</a>	
7	Click <b>Install</b> and follow the prompts to install the program and components. When needed, read and accept the license agreements.		
8	When the Scribe installation completes, click <b>Finish</b> to close the <b>Setup Wizard Completed</b> window.		
<b>Set up the Scribe Database</b>			
1	<p>After Scribe is installed, the <b>Scribe Database Setup</b> window displays. Select the authentication method you configured in the SQL Server preparation step.</p> <p><b>For SQL Server Authentication:</b></p> <ol style="list-style-type: none"> <li>Select <b>SQL Server authentication</b>.</li> <li>Enter the <b>password</b> for either the SA user created when you installed SQL Server Express or the SA password for your SQL Server installation.</li> </ol> <p><b>For Windows Authentication:</b></p> <ul style="list-style-type: none"> <li>Select <b>Windows authentication using the network login ID</b>.</li> </ul>	<a href="#">12</a>	
		<a href="#">12</a>	
2	<p><b>Optional.</b> Use <b>Database Settings</b> to change the locations of:</p> <ul style="list-style-type: none"> <li>Scribe Internal data file</li> <li>Transaction log file</li> </ul>	<a href="#">12</a>	
3	<b>Optional.</b> Create a Scribe sample database.	<a href="#">13</a>	
<b>Install adapters</b>			
	<p>If you selected Insight Adapters during the initial installation, the <b>Adapter Installation</b> window displays after the Scribe Internal database has been created.</p> <p>If you are installing adapters outside of installing Scribe:</p> <ol style="list-style-type: none"> <li>Run <b>Setup.exe</b>.</li> <li>Select <b>Insight Adapters</b> from the Scribe Setup Wizard.</li> <li>Click <b>Start Installation</b> to display the Adapter Installation window</li> </ol>	<a href="#">13</a>	
1	Select the adapter(s) you want to install and click <b>OK</b> .		
2	<p>Follow the instructions in the Setup Wizard for each adapter.</p> <p>If you are installing multiple adapters, each Setup Wizard will start as soon as the previous installation is finished.</p>		



Step	Task	Page	✓
<b>Configuration Steps</b>			
<b>Register Scribe</b>			
1	Verify that you have your Scribe serial number available.		
2	Click the <b>Scribe Workbench</b> icon on your desktop to start the Scribe Workbench.	<a href="#">16</a>	
3	Follow the directions in the Scribe Registration Wizard to register your Scribe products.		
<b>Add Users to the Scribe Console Users Group</b>			
1	Add all local and network Windows users to the Scribe Console Users group that you want to access the Scribe Console.	<a href="#">16</a>	
2	Log off the computer and log back in again to have the changes to the Scribe Console Users group take effect.		
<b>Create Scribe Console Admins Group and add administrative users</b>			
1	Create the Scribe Admin Users Group (Administrator privileges required).	<a href="#">17</a>	
2	Add any users to the group who require access to the Scribe Console <b>Security Settings</b> node.		
<b>Manage Security Settings</b>			
1	Click the <b>Scribe Console</b> icon on your desktop to start the Scribe Console.	<a href="#">17</a>	
2	From the Scribe Console, expand the <b>Administration</b> node.	<a href="#">17</a>	
3	Select <b>Security Settings</b> to open the Security Settings window.		
4	From the <b>File Management</b> tab, select <b>Provide access to SELECTED folders on this server.</b>		
5	From the program location (default: *\Public\Public Documents), select the following folders in the <b>All Folders</b> list, add them to the <b>Console Shared Folders</b> list: <ul style="list-style-type: none"> <li>▪ <b>Collaborations</b></li> <li>▪ <b>Samples</b></li> <li>▪ <b>Templates</b></li> <li>▪ <b>Tracing</b></li> <li>▪ <b>Utilities</b></li> </ul>		

Step	Task	Page	✓
6	Consider giving access to these other locations: <ul style="list-style-type: none"> <li>▪ Event file locations for any Integration Processes</li> <li>▪ Application path, the location of pre/post programs used in integration Processes</li> <li>▪ Other folders that you wish to share across Collaborations</li> </ul>		
7	Click <b>Save</b> to save your changes.		
8	Open the <b>Services</b> tab.	<a href="#">18</a>	
9	Move the five Scribe services from the <b>All Services</b> list to the <b>Shared Services</b> list.	<a href="#">19</a>	
10	Click <b>Save</b> to save your changes.		
11	<b>Optional.</b> If your site is using message queues, open the <b>Message Queues</b> tab and move the three Scribe queues from the <b>Known Message Queues</b> to the <b>Shared Message Queue</b> .		
12	Click <b>Save</b> to save your changes.		
<b>Configure Notification Groups</b>			
1	From the Scribe Console, expand the <b>Administration</b> node.	<a href="#">19</a>	
2	Select <b>Alert Recipients</b> .		
3	Click <b>Add</b> to display the <b>Add Recipient</b> window.		
4	Add the name of the user you want to be notified.		
5	In the <b>Notification</b> tab of the <b>Add Recipient</b> window, specify: <ul style="list-style-type: none"> <li>▪ At least one contact address</li> <li>▪ The alert types for which to send notification</li> </ul> <b>Note:</b> Scribe suggests that you send notifications of critical errors and errors to a real user who will monitor this address.	<a href="#">19</a>	
6	Click <b>Apply</b> to add the recipient.		
7	Click the <b>Recipient Groups</b> tab to add this recipient to the DB Admin and System Admin groups. <b>Note:</b> If you want to send DB Admin and System Admin alerts to separate individuals, create a second recipient and add this recipient to the second group.		

Step	Task	Page	✓
<b>Configure Site Settings</b>			
1	From the Scribe Console, expand the <b>Administration</b> node, and select <b>Site Settings</b> .	<a href="#">20</a>	
2	<p><b>Optional.</b> Change the Collaboration Root Location.</p> <ol style="list-style-type: none"> <li>On the <b>General</b> tab, change the <b>Collaborations root</b> to the Collaboration folder under the Scribe program folder.</li> <li>If using message queuing, verify that the Site Main Queues are correct.</li> <li>Select the <b>Copy system Alerts to the Event Log</b> check box.</li> <li>Click <b>Save</b> to save your changes.</li> </ol>	<a href="#">20</a>	
3	<p>Configure the email settings for the server that determine the mail server used to distribute the outgoing alerts.</p> <ol style="list-style-type: none"> <li>Select <b>Email Settings</b> and enter the information required in the <b>SMTP Configuration (outbound)</b> section.  The information you need to enter depends on the type of SMTP connection selected.</li> <li>Click <b>Test Send</b> to verify the SMTP configuration. The Scribe Insight server sends a test email to the address entered in the <b>From address</b> field.</li> <li>In the confirmation dialog, click <b>OK</b>, then click <b>Save</b>.</li> <li>Open your email software to view the test message.</li> </ol>	<a href="#">20</a>	
4	<p>Set the sleep period to coincide with backup operations:</p> <ol style="list-style-type: none"> <li>On the <b>Sleep Period</b> tab, select the <b>Enable sleep range</b> check box.</li> <li>Enter <b>Start Time</b> and <b>End Time</b> for the sleep period. <b>Start and end times should encompass regular maintenance times.</b></li> <li>Click <b>Save</b>.</li> </ol>	<a href="#">21</a>	
5	<p>Start the Notification Monitor:</p> <ul style="list-style-type: none"> <li>▪ On the <b>General</b> tab, click the <b>Resume</b> button next to <b>Notification Monitor</b>.</li> </ul> <p>The Notification Monitor is set to <b>Active</b> and the button name changes to <b>Pause</b>.</p>	<a href="#">21</a>	

Step	Task	Page	✓
<b>Start the Remaining Monitors</b>			
1	Expand the <b>Integration Server</b> node and select <b>Monitoring</b> .	<a href="#">21</a>	
2	Select each of the system monitors and click <b>Resume</b> . <b>Note:</b> If you receive too much information with all monitors on, you can pause some of the monitors. However, always leave <b>Fatal Errors Detail</b> and <b>Rejected Rows Detail</b> on.		
<b>Create the ScribeIn Queue Monitor (Optional)</b>			
1	If your site uses message queues, create a ScribeIn Queue Monitor. Expand the <b>Integration Server</b> node and select <b>Monitoring</b> .	<a href="#">22</a>	
2	Click <b>Add</b> to create a new monitor.		
3	In the <b>General Settings</b> tab, select: <ul style="list-style-type: none"> <li>▪ <b>Monitor Type</b> — Queue</li> <li>▪ <b>Monitor Name</b> -- ScribeIn Queue Detail</li> </ul>		
4	Click <b>Step 2: Source Connection</b> and select <b>Scribe Input Queue</b> .		
5	Click <b>Step 3: Alert Criteria</b> and select the alert criteria you want.		
6	Click <b>Step 4: Monitor Interval</b> . In the <b>Monitoring Interval Settings</b> , set the interval to Monitor every 15 minutes.		
7	Click <b>Step 5: Activation</b> and select <b>Status – Active</b> .		
8	Click <b>Step 6: Alerting</b> : <ul style="list-style-type: none"> <li>▪ In <b>Alert Type</b>, select <b>Critical</b>.</li> <li>▪ In <b>Alert description</b> and <b>Alert message</b>, enter a meaningful description and message.</li> </ul>		
9	Click <b>Apply</b> to create and start the new monitor.		
<b>(Optional) Create a User for the Scribe Services</b>			
	Scribe suggests that you create a Windows account to be used by the Scribe services. <ul style="list-style-type: none"> <li>▪ Set up this account with the necessary access on the local computer and on other computers on the network.</li> <li>▪ After you create this account, change the properties on the Scribe services to log on as this account.</li> <li>▪ If the Scribe processes need access to remote file servers or a network system, set up a specific user account that has access to the remote files and run the Scribe services under this user.</li> </ul>	<a href="#">23</a>	

# 10. Troubleshooting

There are a number of ways to get help with Scribe Software products, as well as to share your solutions with the Scribe user community.

## Technical support

Scribe technical support is available Monday through Friday, between the hours of 4:00 AM and 8:00 PM Eastern US time (except major local holidays).

To get started with Scribe technical support, call **+1 603 622 5109** and press **3**. A Scribe technical support representative will be happy to explain your support options and help you get started.

For on-line support information, visit [Scribe Online Support](#)

## Downloading Scribe

You can download the Scribe installation software from the [Scribe Insight and Adapters Downloads](#) page. When you purchase Scribe and any required adapters, Scribe Software, Inc. provides serial numbers that allow you to register and use your product(s).

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**Note:** Before you begin the registration process, make sure any Scribe serial numbers are available.

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## The Scribe User Community

The Scribe OpenMind Community allows you to connect with other Scribe users, the Scribe Knowledge Base, and Scribe product management. The Scribe Knowledge Base contains information about using Scribe Insight and features. If you have a question about your Scribe products, Scribe suggests that you start by looking in the Knowledge Base.

Register to join OpenMind at the [OpenMind Account Login](#) page.

## Feedback

Scribe is very interested in hearing about your experiences with our products and documentation. We welcome your suggestions for improvement and encourage you to provide feedback through the [Scribe OpenMind community](#) page. OpenMind also lets you see information on upcoming product releases and engage in online discussions with Scribe product management and other Scribe users.