Scribe Insight Installation Guide

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Important Notice

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Publishing Information

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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 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. Typically, optimal performance occurs when you install 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** – (SCRIBEINTERNAL) Contains settings, process execution history, error logs, and other Scribe-related data. This Microsoft SQL Server database is used by all other Scribe components. If your site does not have SQL Server you, can install Microsoft SQL Server Express as part of the Scribe installation process.
- **Scribe Insight 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** – 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** – Provides a user interface for configuring and managing automated integration processes on the Scribe Insight server. This is a Microsoft Management Console (MMC)-based application that you can install independently of the Workbench (installed separately as the Scribe Workstation) and the rest of the product, 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** – 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 Scribe Help Library for the Help on each adapter, which provides more information about installing and using Scribe adapters in your environment.

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

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

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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 R2 Data Center and Standard Editions (x64)
- 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, x64) with SP 2
- Windows 7 Enterprise Edition (x86 and x64)

Minimum Hardware Requirements

While Scribe Software does not require that the Scribe server components be installed on a separate dedicated computer, doing so can greatly improve performance. 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)
- System memory – 4 GB is required (more is recommended)

Microsoft Windows Components

- Microsoft .NET Framework 4.0 or later (the Scribe installer provides an option for installing Microsoft .NET Framework 4 if it is not already installed)

  Note On Windows 2012, you must also install Microsoft .NET Framework 3.5.

- 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

  Note If using MSMQ, your machine name must be no longer than 15 characters.

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.

Required 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. Expand **Computers** and expand **My Computer**.
3. Expand **DCOM Config**.
4. For each of the five Scribe services:
   a. Right-click the Scribe service and select **Properties**.
   b. On the Security tab, under **Launch and Activation Permissions**, click **Customize**.
   c. Click **Edit** to open the Launch and Activation Permission dialog box.

d. Click **Add** and add the domain user.

e. Under **Permissions**, select **Allow** for **Local Launch** and **Local Activation**.

f. Click **OK** to save your changes and close the Launch and Activation Permission dialog box.

g. Under Access Permissions, click **Customize**.

h. Click **Edit** to open the Access Permissions dialog box.

i. Click **Add** and add the domain user.

j. Under **Permissions**, for **Local Access**, select **Allow**.

k. Click **OK** to save your changes and close the Access Permissions dialog box.

5. 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, expand the following nodes **Services and Applications**, expand **Message Queuing**, and expand **Private Queues** (or Private).
3. Right-click **scribedeadmessage** and select **Properties** to open the Properties dialog box.
4. In the Properties dialog box:

   a. Select the **Security tab**.

   b. Click **Add**, and add the domain user.

   c. Under Permissions for the domain user, for **Full Control**, select **Allow**.

   d. Click **OK** to save your changes and close the Properties dialog box.
5. Repeat steps 3 and 4 for the **ScribeIn** and the **ScribeRetry** queues, and 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 the following Services:

   - **Message Queuing**
   - **Scribe MessageService**
   - **Scribe AdminServer**
   - **Scribe BridgeServer**
   - **Scribe EventManager**
   - **Scribe MonitorServer**

Other required privileges

- If the domain user will use 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, if your organization runs both Dynamics CRM and Salesforce CRM systems, and 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 have 100 Dynamics CRM users and 220 Salesforce users, for a total of 320 users, which 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).

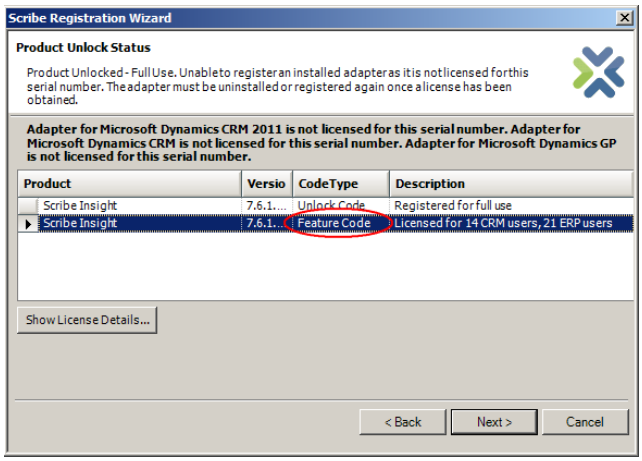
If your organization neither upgrades nor reduces the number of users, your Insight Administrator receives warning emails for 15 days. After that time, jobs using these connections no longer run.

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

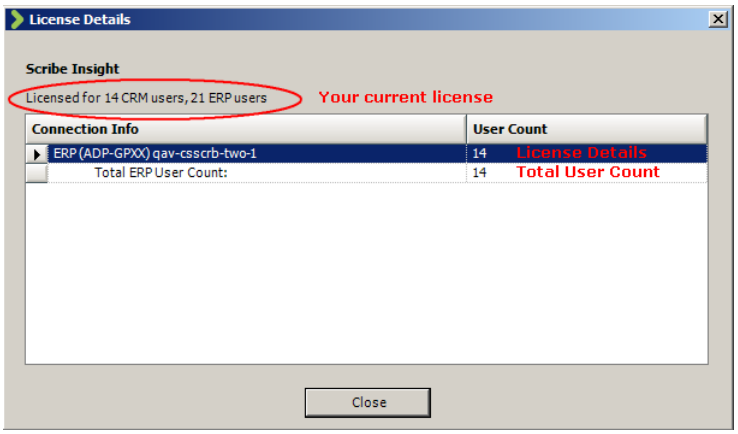
Determining the current number of users

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

1. From the Scribe Insight Workbench, on the **Help** menu, select **Add or Upgrade license**. The Scribe Registration Option screen appears.
2. Click **Next**.
3. On the License Upgrade/Expansion and Collect User Information pages, click **Next**.
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 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 Authenticatino user

Installing Scribe with Windows Authentication

For information about installing with Windows Authentication, see Section 8 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 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.

Failover

Failover allows a group of servers to maintain a high availability of the Scribe Insight Application and Services. You can perform failover for Scribe Insight with either application-based clustering or Hyper-V clustering.

The method you use choose depends on your site requirements:

- Application-based failover requires two servers in a Windows Failover Cluster and is supported on Windows Server 2008 R2 and later.
- Hyper-V Clustering requires a two-node Windows Failover Cluster with Hyper-V installed. Hyper-V Clustering for Scribe Insight is supported on Windows Server 2008 R2 and later.
- Mixed-mode clustering is a combination of Application-based and Hyper-V Clustering. In this mode, you install and configure Hyper-V clustering, using two images where one image is active and the other is in standby mode.

For more information, see Configuring A Failover Cluster on page 37.

3. Installing Scribe Insight Server

Downloading Scribe Software

Note You must be logged in as a user with local administrator privileges to complete the installation and configuration.

1. Verify that you:
   - Have appropriate hardware and software
   - Have the login names and passwords for any 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. Log out, log into an administrative account, and repeat this procedure.

Installing Scribe Insight Server Prerequisites

When you run Setup.exe, the Scribe Insight Setup window displays 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 by exiting out of the Scribe Insight Setup window, installing the necessary components, and restarting 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 has Microsoft SQL Server installed, you can use an instance of SQL Server for your Scribe internal database. Otherwise, select the check box to install Microsoft SQL Server Express 2012, 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.

Note If you are installing Scribe Insight on Windows 2012, you must install Microsoft .NET Framework 3.5:

1. From the **Start** menu, click **Manage Server**.
2. Select **Manage > Add Roles and Features**.
3. Select **Microsoft .NET Framework 3.5**.

To install Scribe prerequisites

1. In the **Scribe Insight Setup** window, select the features you want to install.
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.

   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 click **Restart Now** to restart your computer, if needed.

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. Use this procedure to upgrade from an existing Scribe Insight installation.

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, the Microsoft Windows Installer is unavailable.
2. Verify that the check box for **Microsoft SQL Express** is 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**.

Notes 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.

Notes If you are upgrading from an existing Scribe Insight installation and receive timeout errors, open the SQL Server Management Studio and run the appropriate script to upgrade from your current version:

- Version 7.6.0 — ScribeInternal_Upgrade_760_to_761.sql
- Version 7.6.1 — ScribeInternal_Upgrade_761_to_762.sql
- Version 7.6.2 — ScribeInternal_Upgrade_762_to_770.sql

Specify scribeinternal as the destination database

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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.

Notes

- When you install Scribe Workstation, you must install the Scribe Internal Scribe database on any supported SQL Server instance, either 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 Installing Scribe Workstation.

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 8 Installing Scribe with Windows Authentication.
4. Optionally, click **Database Settings** to display the Internal Database Settings window, where you can change:
   - Data file location
   - Transaction log file location

   Note If you are 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.

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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 click **Exit** to close the Scribe Insight Setup window, if you are not installing adapters at this time.
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.
  ```

- 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, have the following files available and contact Scribe Online Support for help:

- 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 separate downloads. 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.

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 you to 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 are running, click **Cancel**, from **Administrative Tools**, open **Services**, manually stop Scribe services, and pause all integration components.
   - If you know there are no integrations running, click **OK**. Scribe stops the services and uninstalls the adapter.

Note Clicking OK 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, on 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.

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 the installation, you must register, set up, and configure Scribe Insight.

Registering Scribe

Before you can begin using Scribe, you must register with Scribe. 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**.

   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.

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..

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.

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.

After adding users to the Scribe Console Users group, log out of 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.

Notes

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

To create Scribe Console Admins group

1. On the Active Directory system, open **Active Directory Users and Computers**.
2. Right click the domain name and on the **New** menu, select **Group**.
3. Name the group **Scribe Console Admins**.
4. Set Scope to **Global**.
5. Set Type to **Security**.
6. Click **OK**.

After adding users to the Scribe Console Admins group, log out of 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 when the Console 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**, indicated by (Local).
2. Expand **Administration** and click **Security** to display the **Security Settings** window.
3. From the **File Management** tab, select **Provide access to SELECTED folders on this server**.

4. 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
5. When you have finished, click **Save**.

Notes

- The default Application path is \Program Files\Scribe\Utilities. To change the Application path, select and right-click the **Integration Servers** node for your server, click **Properties**, and change the path in the Integration Server Properties box.
- When you configure File Management security, if both a Universal Naming Convention (UNC) and physical path appear in the All Folders dialog box, always select UNC. 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 following 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 following Scribe 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. To email notifications when Scribe Insight server errors occur, you must configure email server settings and at least one recipient for each group. At least one recipient must receive critical error and error alerts. Different users can receive DB Admin alerts and System Admin alerts.

The Scribe Insight server generates alerts at the following levels of severity:

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

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** and add the name of the user you want to be notified.
3. In the **Notification** tab, enter a contact method: email, pager or Net Send.
4. Select which notification types should be sent using this method.

   Note Send critical 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.

Configuring Site Settings

Site Settings set parameters for the entire Scribe server.

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 centrally accessible location, 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. In the Scribe Console, expand the **Administration** node and select **Site Settings**.
2. On the **General** tab, set the **Collaborations root** to the Collaborations folder under the ***\Public\Public Documents\Scribe** folder.
3. If you are using message queuing, verify that the **Site Main Queues** are correct.
4. Select the **Copy system Alerts to the Event Log** check box.
5. Click **Save** to save your changes.

Configuring Email Settings

Configure settings for the mail server that distributes outgoing alerts so recipients such as the Administrator receive email alerts. POP3 configuration is required only if your site uses the Email Bridge feature.

To configure email settings

1. In the Scribe Console, expand the **Administration** node and select **Site Settings**.
2. On the **Email Settings** tab, complete all the enabled fields in the **SMTP Configuration** section. The login method determines the information required. You may need to set an authentication method as well as a username and password.
   - **From** – Name that appears as the sender for alerts.
   - **From address** – Return address 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.
3. Click **Test Send**. The Scribe server sends a test email to the address entered in **From address** and a confirmation dialog box appears.
4. Click **OK**, then click **Save**.
5. Open your email program to view the test message.

Setting the Sleep Period

The Scribe Internal database files and the Collaboration root folder must be backed up regularly. Most backup operations lock files during the backup process, which disables Integration Processes and Monitors. The configured Sleep Period start and end times should encompass regular maintenance times.

To set the sleep period

1. In the Scribe Console, expand the **Administration** node and select **Site Settings**.
2. On the **Sleep Period** tab, select the **Enable sleep range** check box.
3. Enter **Start Time** and **End Time** for the sleep period.
4. Click **Save**.

Starting the Notification Monitor

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

To start the Notification Monitor

1. In the Scribe Console, expand the **Administration** node and select **Site Settings**.
2. On the **General**, click **Resume**. The Notification Monitor is set to **Active** and the button name changes to **Pause**.

Managing other Monitors

You can start existing monitors and add a ScribeIn Queue monitor.

Starting the Monitors

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

To start the remaining monitors

1. In the Scribe Console, expand the **Integration Server** node and select **Monitoring**.
2. Select each system monitor and click **Resume**.

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

Adding a ScribeIn Queue Monitor

If your site uses 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 that needs to be addressed.

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

To create the ScribeIn Queue Monitor

1. In the Scribe Console, expand the **Integration Server** node and select **Monitoring**.
2. Click **Add** to create a new monitor.
3. In the **General Settings** tab, select:
   - **Monitor Type** — Queue.
   - **Monitor Name** -- ScribeIn Queue Detail.
4. Click **Step 2: Source Connection**, then select **Scribe Input Queue**.
5. Click **Step 3: Alert Criteria**.
6. Configure the alert based on one of the following criteria:
   - Number of messages in the queue — In **Message count in queue greater than,** enter a number appropriate for your site, such as **50**. This number depends on the environment for which the integration is being developed.
   - Length of time messages have been in the queue — In **Message duration in queue greater than**, select a number that is appropriate for your site, such as 1 Hour(s).
7. In the Alert Recipients box, use the browse button to select the Recipient or Group to Alert.
8. Click **Step 4: Monitor Interval**. In Monitoring Interval Settings, set the interval to Monitor every 15 minutes.
9. Click **Step 5: Activation**. Select **Status – Active**.
10. 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.
11. 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 (for example, if 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 Section 2 Installation Prerequisites.
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.**

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, in Section 2). If you are using SQL Server authentication, use the default.
4. Click **Test Connection** to validate that the connection to the database is live.
5. After validating the connection, 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.

Adding the Scribe Console Users group on the server

The Scribe Console Users group includes all users who have access to the Scribe Console. Any user who needs access to the Console must be a member of this group.

1. In Control Panel, double-click **Administrative Tools**. The Administrative Tools dialog box appears.
2. Double-click **Component Services**. The Component Services dialog box appears.
3. Expand **Component Services** and expand **Computers**.
4. Right-click **My Computer** and select **Properties**. The My Computer Properties dialog box appears.
5. Click the **COM Security** tab and click the **Edit Default** button for **Access Permissions**. The Access Permission dialog box appears.
6. Click **Add**. The Select Users, Computers, or Groups dialog box appears.
7. Add the Scribe Console Users group and click **OK**. You return to the Access Permission dialog box.
8. With the **Scribe Console Users** group selected, select the **Allow** checkboxes for:
   - **Local Access**
   - **Remote Access**
9. Click **OK**. You return to the My Computer Properties dialog box.
10. Click the **Edit Default** button for **Launch and Activation Permissions**. The Launch and Activation Permission dialog box appears.
11. Click **Add**. The Select User, Computers, Service Accounts, or Groups dialog box appears.
12. Add the Scribe Console Users group and click **OK**. You return to the Launch and Activation Permission dialog box.
13. With the **Scribe Console Users** group selected, select the Allow checkboxes for:
    - **Local Launch**
    - **Remote Launch**
    - **Local Activation**
    - **Remote Activation**
14. Click **OK**. You return to the My Computer Properties dialog box.
15. Click **OK**. You return to the Component Services dialog box.
16. Close the Component Services dialog box. You return to the Administrative Tools dialog box.
17. Double-click **Local Security Policy**. The Local Security Policy dialog box appears.
18. Expand **Local Policies**.
19. Right-click **Security Options** and click **Open**.

20. Double-click **DCOM: Machine Launch Restrictions in Security Descriptor Definition Language (SDDL) syntax**. The DCOM: Machine Launch Restrictions in Security Descriptor Definition Language (SDDL) syntax Properties dialog box appears.
21. Click **Edit Security**. The Launch and Activation Permission dialog box appears.
22. Click **Add**. The Select Users, Computers, Service Accounts, or Groups dialog box appears.
23. Add the Scribe Console Users group and click **OK**. You return to the Launch and Activation Permission dialog box.
24. With the **Scribe Console Users** group selected, select the Allow checkboxes for:
    - **Local Launch**
    - **Remote Launch**
    - **Local Activation**
    - **Remote Activation**
25. Click **OK**. You return to the DCOM: Machine Launch Restrictions in Security Descriptor Definition Language (SDDL) syntax Properties dialog box.
26. Click **OK**. You return to the Local Security Settings dialog box.
27. Close the Local Security Settings dialog box. You return to the Administrative Tools dialog box.
28. Close the Administrative Tools dialog box. You return to the Control Panel.
29. Close the Control Panel.

If you follow all of the steps above and are still having issues connecting the remote console to the Scribe server, see this article: HOWTO: Configure the Firewall to allow DCOM connections on Windows Server 2008 (and higher).

Create the Scribe Console Admins Group

You only need to create the Scribe Console Admins Group if any Scribe Admin users require remote access. You must have Administrative privileges to create this group.

For information on creating the Scribe Console Admins Group, see Managing Access to the Scribe Console, in Section 4.

6. Upgrading Scribe Insight

If you have an earlier version of Scribe Insight, you can upgrade your installation. Depending on the version you are currently running, you may need to perform particular tasks.

The upgrade process includes:

- Preinstallation tasks
- Installing Scribe Insight
- Installing Scribe Adapters
- Updating the Scribe Internal Database
- Registering Scribe Insight
- Verifying user accounts

Preinstallation Tasks

1. Pause all Publishers and any Integration Processes.
2. In the Scribe Console, from the **Actions** menu, select **Import/Export Wizard** to export the Scribe Package.
3. Review the following log files and verify that they do not contain a large number of records:
   - AlertLog
   - ExecutionLog
   - TransactionErrors
   - Any rejected row tables

   If these log files contain a large number of records, run **ScribeMaintenance.sql**, in the folder where Scribe is installed.
4. Contact your Database Administrator about backing up the Scribe Internal Database.
5. Make a copy of the **Collaborations** folder. By default, this folder is located in the *\Public\Public Documents\Scribe folder.
6. In Scribe Workbench, from the **Help** menu, select **About Scribe Insight**.
7. Select and copy the **Serial Number** value.
8. Open a blank Notepad document and paste the value.
9. From the **Help** menu, select **Unregister this Computer**, and click **Yes**.
10. Open the Task Manager, click the **Processes** tab, select the **Scribe.UpdateService.exe** process, and click **End Process**.

11. Do the following, as necessary:
    - If you are updating Scribe Insight from a version prior to **7.6.2**, verify that UAC is disabled.
    - If you are running an adapter that requires Windows Identity Foundation (WIF), do one of the following:
        - Windows Server 2008 – Install the appropriate version of WIF
        - Windows Server 2012 – Enable/Install WIF 3.5 via Features
    - If WIF is installed, verify that Microsoft .NET Framework 3.5 is also installed. If it is not, do one of the following:
        - Windows Server 2008 – Install .NET 3.5 Framework if necessary
        - Windows Server 2012 – Enable/Install .NET 3.5 Framework via Features
    - If you are using the Dynamics AX, Dynamics CRM, Dynamics GP, Dynamics NAV, or Query Publishers, you must install the Microsoft Message Queue (MSMQ).

Notes

- MSMQ is not installed as part of the Scribe Insight installation. If it is not already installed, a message during the installation states that it is not installed. You must install MSMQ separately.
- If using MSMQ, your machine name must be no longer than 15 characters.

Install Insight and Adapters

You can install the Adapters either as part of the Insight installation, or separately, and can add adapters after the initial installation.

Notes

If you are upgrading from an existing Scribe Insight installation and receive timeout errors, open the SQL Server Management Studio and run the appropriate script to upgrade from your current version:

- Version 7.6.0 — ScribeInternal_Upgrade_760_to_761.sql
- Version 7.6.1 — ScribeInternal_Upgrade_761_to_762.sql
- Version 7.6.2 — ScribeInternal_Upgrade_762_to_770.sql
- Version 7.7.0 — ScribeInternal_Upgrade_770_to_780.sql
- Version 7.8.0 — ScribeInternal_Upgrade_780_to_790.sql

Install Insight with Adapters

1. If you are updating from Scribe Insight 6.4.0 or earlier, uninstall Insight.
2. Download the Scribe installer from the Scribe Insight and Adapters Downloads page.

   If you are using Windows authentication, log in as the Windows domain user that is a SQL Server principal with dbcreate rights.
3. Unzip the installer on your system.

4. From the unzipped installer files, double-click **Setup.exe**. The Scribe Insight Setup window appears.
5. Verify the following prerequisites are installed:
   - Microsoft Windows Installer 3.1
   - Microsoft .NET Framework 4.0
   - Microsoft .NET Framework 3.5 (Windows 2012 only)
   - Microsoft SQL Express 2012 (optional)
6. Select the **Insight Installed – Upgrade** and **Insight Adapters** checkboxes.
7. Click **Start Installation**. The Setup Wizard Welcome screen appears.
8. Click **Next**. The License Agreement screen appears.
9. Select **I accept the terms in the license agreement** and click **Next**. The Ready to Install screen appears.
10. Click **Install**. When the installation is finished, the Setup Wizard Completed screen appears.
11. Click **Finish**. A message that the Scribe Internal Database was validated appears.
12. Click **OK**. A message that the Scribe Internal Database indexes were validated appears.
13. Click **OK**. The Select Registration Option screen appears.
14. Select the registration option, click **Next**, and follow the prompts until the Registration Complete screen appears.
15. Click **Finish**. You return to the Scribe Insight Setup window.
16. Click **Exit**.

Install Adapters Separately

1. Run **Setup.exe**.
2. Select **Insight Adapters** from the Scribe Setup Wizard.
3. Click **Start Installation** to display the Adapter Installation window.
4. Select the adapter(s) you want to install and click **OK**.
5. Follow the instructions in the Setup Wizard for each adapter.
6. If you are installing multiple adapters, each Setup Wizard starts as soon as the previous installation finishes.

Updating the Scribe Internal Database

1. If the Scribe Internal Database will remain on the current server, choose the option to **upgrade the existing DB**.
2. If the Scribe Internal Database is being restored to a new server:
   a. Choose the option to install a new Scribe Internal Database.
   b. Restore the existing Scribe Internal Database to the new SQL Server.
   c. If you get Scribe Schema errors after restoring the database, run the SQL:

      ALTER USER Scribe WITH LOGIN = Scribe

      This is usually required if you are using SQL authentication and a Scribe user exists in SQL.
3. Run **Program Files (x86)/Scribe/InternalDB.exe**, then run the **Update Database** option.

Post-Installation Tasks

1. If Scribe was installed on a new server, correct the server references in the Scribe Internal Database:
   a. Run **Program Files (x86)/Scribe/InternalDB.exe** and perform a Test connection.
   b. Specify the option to change the server name, and provide the old and new Scribe server names.
2. Register Scribe through the Workbench.
3. If you have issues registering Scribe, run **ClearScribeLicense.sql**, found in the folder where Scribe is installed.
4. Verify that the Scribe services **LogOn** user is a domain account that belongs to the local Administrators and Scribe Console User groups.
5. Restart the Scribe Services.

   Perform any post-installation steps required for the Adapters you have installed. See the Help file for those steps. For example:

   - Dynamics GP – Run metadata SQL scripts.
   - Dynamics NAV – Update the FOB files, etc.
6. If you are upgrading to an X.0 version, such as 8.0, open the DTS to upgrade it.

Troubleshooting the Upgrade

If you are upgrading Scribe or the Scribe Internal Database on a new server, some problems that you may find are:

- UAC is disabled — UAC is not required for Insight 7.6.2 and later. Disable UAC, if necessary.
- Scribe Services Logon User — This user account should be a domain account that belongs to the local Administrators group and the Scribe Console User groups.
- Server name — Verify the proper server name is in the various fields for the IntegrationServers, Ksync, and Monitors tables. If not, add the server name using InternalDB.exe ().
- Verify the Path is correct in the Ksync table (CollaborationsRoot - KEYVALUE).
- Windows Authentication — If you are using Windows Authentication for the Scribe Internal database, verify that the service logon user is db_owner and that user has permissions for the Scribe Internal database.
- ClearScribeLicense — Run ClearScribeLicense.sql and reregister in the Workbench.

7. 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.

   Note
   - 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 each day, every time the service runs.

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 page 15, as well as making other changes to your Scribe installation.

8. 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.

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 high-level 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 install Scribe.
3. Run **Setup.exe** to start the Scribe Insight Installation wizard.
4. Follow the installation steps, as described in 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

When the Workbench or Console starts, it connects to the Scribe Internal database. If you are 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 users 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 the principal is associated with the Scribe Internal database (SCRIBEINTERNAL).
2. Verify the principal has the following permissions to the SCRIBE schema in the Scribe Internal database:
   - **Select**
   - **Insert**
   - **Update**
   - **Delete**
   - **Execute**
   - **Alter**

   Note You can use the SQL Server predefined role, **dbowner**, to simplify this process. See 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

Scribe services enable Scribe to run when no one is logged on to the integration server. When these services are installed, they are configured to log on as the local system account. With Windows Authentication, the services must log on as a Windows principal with privileges to access the Scribe Internal database.

To edit the properties of the Scribe Services

1. In the Windows Services applet, right-click the **Scribe AdminServer** service and click **Properties**.
2. Click the **Log On** tab.
3. Edit the properties so the service logs on as the principal you set up for it. Click **OK**.
4. Repeat these steps for following services:
   - **Scribe BridgeServer**
   - **Scribe EventManager**
   - **Scribe MessageServer**
   - **Scribe MonitorServer**

9. Configuring A Failover Cluster

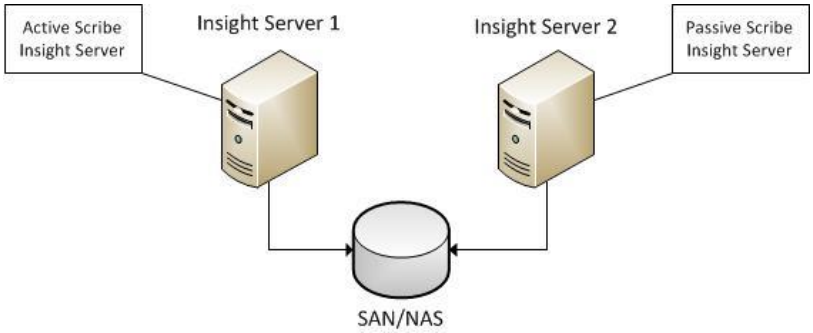
Failover allows a group of servers to maintain a high availability of the Scribe Insight Application and Services. You can perform failover for Scribe Insight with application-based failover, Hyper-V clustering, or mixed-mode clustering. The method you use choose depends on your site requirements.

Note Scribe failover is only available with Scribe Professional and Enterprise licenses.

Application-Based

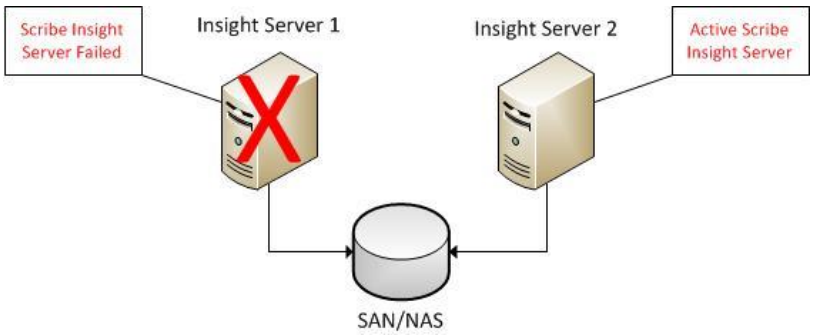
Application-based failover requires two servers in a Windows Failover Cluster and is supported on Windows Server 2008 R2 and later.

In your Application-based failover, one server actively runs Insight Applications and Services while the other server is in standby mode, waiting to take over in case a server fails.



Application-Based Failover Cluster In Standby

The advantage of using Application-based failover is there is no down time when a server fails or when performing maintenance, such as Insight upgrades, patches, or operating system updates.

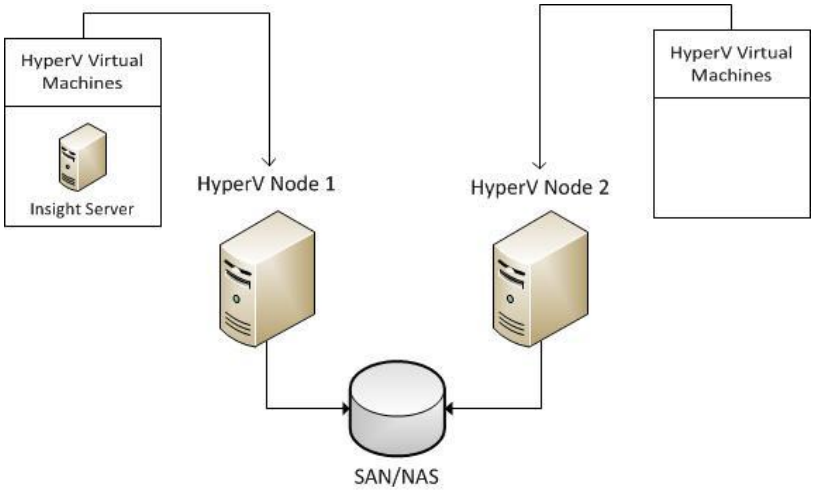


Application-Based Failover Cluster During Server Failover

Hyper-V Clustering

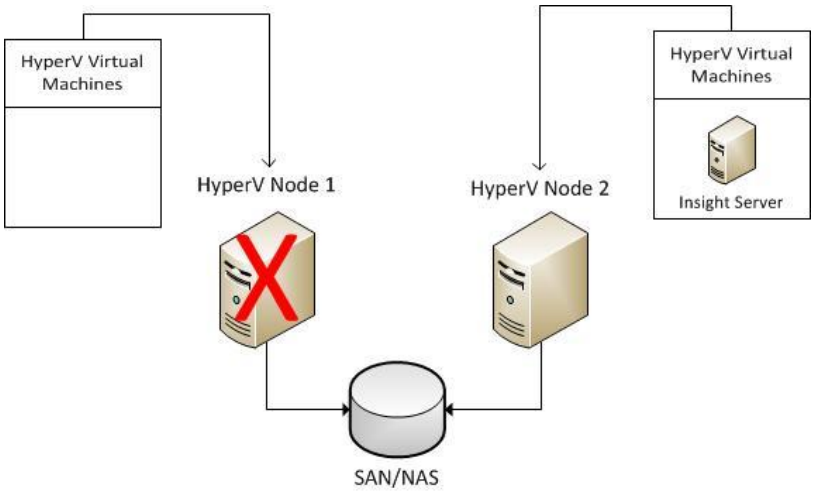
Hyper-V Clustering for Scribe Insight requires a two-node Windows Failover Cluster with Hyper-V installed. Hyper-V Clustering is supported on Windows Server 2008 R2 and later.

The advantage of using Hyper-V clustering is the ease of setup and management: you install only one instance of Scribe Insight on a Virtual machine that can failover between the two Hyper-V cluster nodes. Scribe Insight remains up as long as one of the servers in the cluster is up.



Hyper-V Cluster

With Hyper-V clustering, you must allow for downtime during maintenance, because there is only one instance of Insight running.



Hyper-V Cluster During Failover

Before you set up Insight, the Hyper-V role must be installed and the Windows Failover Clustering feature must be configured by your IT Administrator and validated.

For more information, see:

- Failover Clustering Overview — https://technet.microsoft.com/en-us/library/hh831579.aspx
- Hyper-V Overview — http://technet.microsoft.com/en-us/library/hh831579.aspx.
- Microsoft Virtualization — http://www.microsoft.com/en-us/server-cloud/solutions/virtualization.aspx

Mixed-Mode Clustering

The ideal failover setup is a combination of Application-based and Hyper-V Clustering. Mixed-Mode clustering uses two nodes, each using Hyper-V, to provide additional redundancy in the case of a hardware or Hyper-V failure, maintenance periods, or any other down time that may occur in your environment.

To use a mixed-mode clustering:

- Install and configure Hyper-V clustering on two images.
- Set up each image to act like a node in the application-based failover, where one node is active and the other is in standby mode.
- Following the application-based steps, set up the services, MSMQ, and other requirements outside of the Hyper-V images.

Configuring an Application-Based Failover Cluster

When running in a Windows Server 2012 R2 environment, 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 can access shared MSMQ queues, a shared disk, as well as Scribe services.

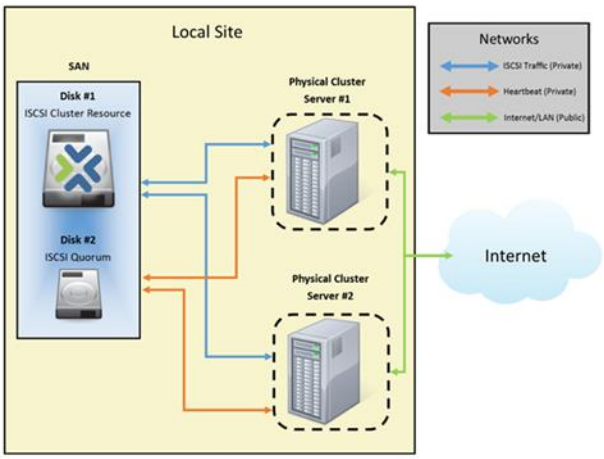
For an overview of failover clusters, see the Microsoft article, Failover Clustering Overview.

To learn more about configuring a Microsoft failover cluster in Windows Server 2012 R2, see the MSDN article, Creating a Cluster in Windows Server 2012 R2.

Note Before you use failover, verify that UAC is not enabled.

Example: Two-Node Clustered Environment

The following example is a high-level architecture of a Windows Server 2012 R2, showing a two-node clustered environment where Scribe Insight is installed on a Virtual Image and stored on an Internet Small Computer System Interface (ISCSI) resource drive, which is exposed as a SAN to the clustered servers. These servers have private networks to connect to their resource.



Configuration Overview

Installing Scribe in a Windows 2012 R2 failover cluster environment includes:

- Installing and Configuring Scribe on Node 1
- Installing and Configuring Scribe on Node 2
- Moving and Testing the Scribe Cluster

Prerequisites

- The Microsoft Cluster Server must be installed and configured.
- Windows Authentication for SQL Server must be configured. See Installing Scribe with Windows Authentication.
- You must have access to an existing failover cluster that has been properly configured and validated with Microsoft's Validate a Configuration wizard.
- You must be a member of the Scribe Console Admins group.
- You must know the Windows Service Account for the Cluster Service. This account must have datareader and datawriter privileges to the SCRIBEINTERNAL database, and must be added to the Scribe Console Users group, the Scribe Console Admins group, and the Scribe Internal database.
- You must have permissions in SQL Server to grant Scribe Internal Database datareader and datawriter privileges to the Scribe Console Users Group Active Directory group.

- You must have privileges to install on the servers and configure the cluster to work with Scribe.
- The user who logs on to install Scribe Insight on Node 1 must have dbcreator privileges on the SQL Server where the Scribe Internal Database is created.
- You must 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).
- You must close any open RDP sessions before deploying Scribe. No RDP sessions can be connected to either server node.
- The Scribe failover cluster must include these resources:
  - Domain account to administer the cluster.
  - Two Windows Server 2012 R2 failover cluster nodes.
  - Network name for the Scribe failover cluster instance.
  - IP address.
  - Shared Cluster disk for the Scribe Collaboration folder. Scribe recommends that this be a different disk than the Cluster Quorum disk.
  - MSMQ. Scribe Insight does not install MSMQ.

Notes

- If MSMQ is not installed, a message informs you during the Scribe Insight installation. You must install it separately.
- If using MSMQ, your machine name must be no longer than 15 characters.

Installing and Configuring Scribe on Node 1

Before you install Scribe Insight, the Scribe installation paths must be identical on both nodes of the cluster.

Install Scribe Insight on Node 1

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. For more information on installing, see Installing Scribe Insight Server.
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**. When the Scribe Insight installation completes, the Scribe Database Setup window appears.

Create and configure the Scribe Internal Database on Node 1

1. From the Scribe Database Setup window, verify **Create a Scribe Internal Database on SQL Server** is 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 database name (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!.

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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 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.

Copy SQL scripts to the Scribe directory

Windows 2012 R2 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 the following 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

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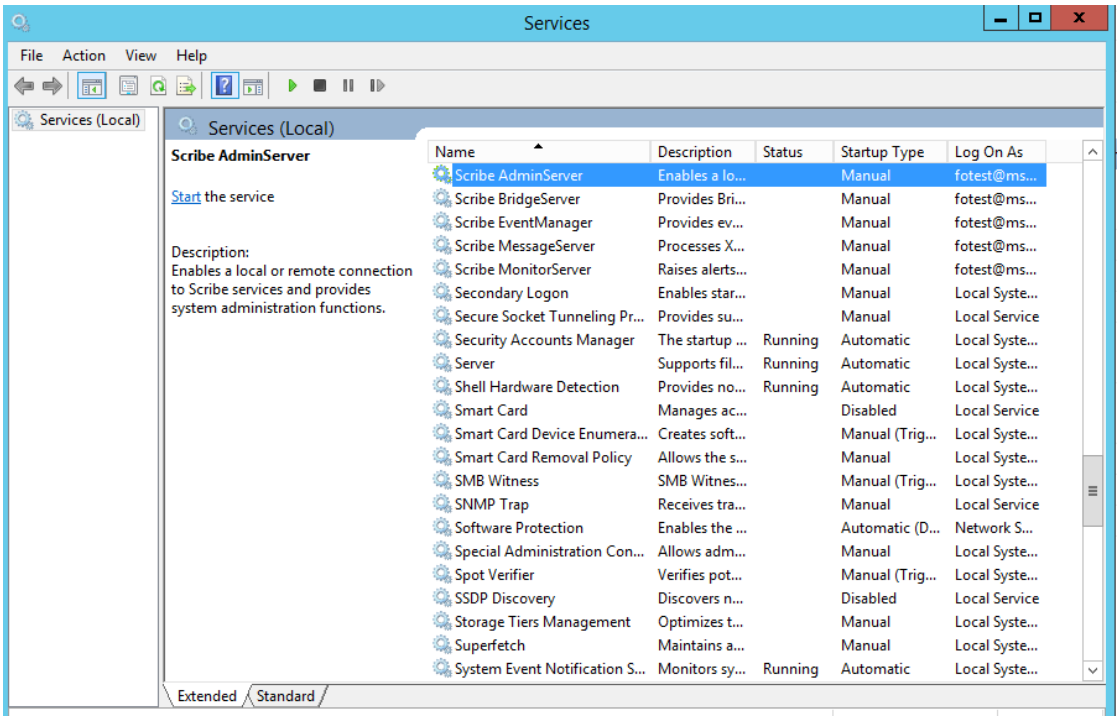
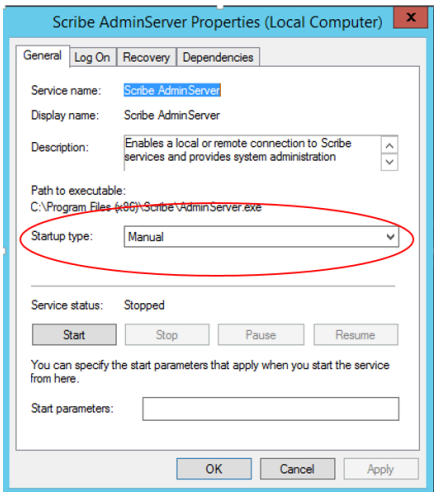
Note ChangeScribeServer.sql already exists in the Scribe directory. Click **Yes** when prompted to overwrite the existing file.

Configure Scribe Insight Services

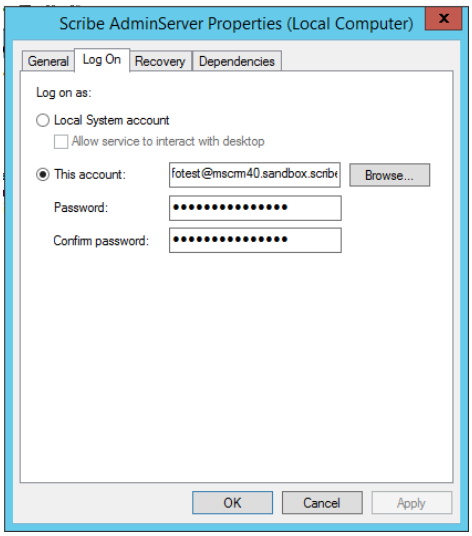
1. From the **Services** applet on **Node 1**, right-click each of the following services and click **Properties**:
   - **Scribe AdminServer**
   - **Scribe BridgeServer**
   - **Scribe EventManager**
   - **Scribe MessageServer**
   - **Scribe MonitorServer**



2. On the General tab, set **Startup Type** to **Manual**.



3. Click the **Log On** tab.
4. Select **This account**, and enter the name and password of the Scribe Services account. For example:



5. Click **OK**.

Add Users to the Scribe Console Users Group

The Scribe Service account and any other users that require access to the Scribe Console must be registered in the Scribe Console Users Group.

1. Select **Start > Administrative Tools > Computer Management**. The Computer Management window appears.
2. Expand **System Tools**, expand **Local Users and Groups**, and select **Groups**.
3. Right-click the **Scribe Console Users** group and click **Properties**.
4. Add the **Scribe Service** account and any users that must access the Scribe Console.
5. Log out and log in to Node 1 as a user in the Scribe Console Users Group.

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

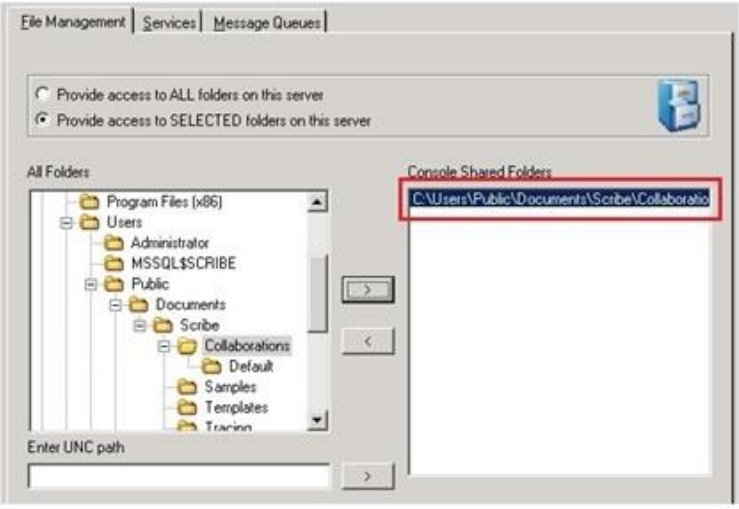
Register Scribe

Open Scribe Workbench, register with a Professional or Enterprise license key that supports your clustered failover environment, and close Scribe Workbench. For more information about registering Scribe, see Registering Scribe on page 17.

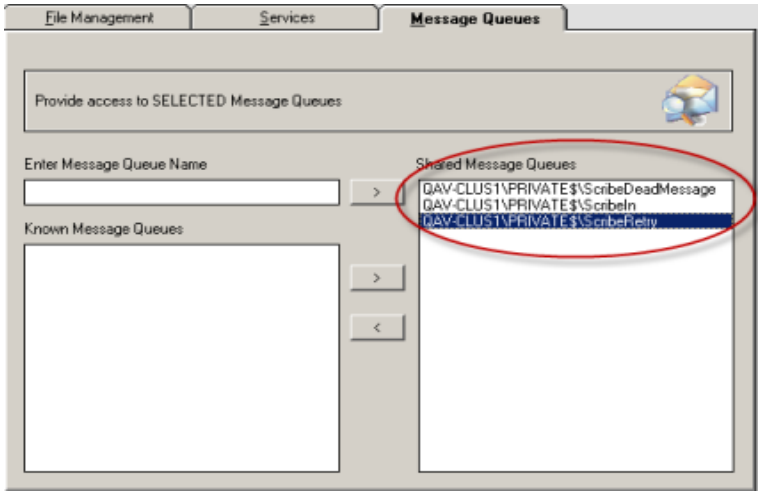
Configure Settings in Scribe Console

You must configure the Collaborations folder and shared messages queues.

1. Move the **Collaborations** folder to a shared drive, accessible by both nodes in the cluster. The default folder is C:\Users\Public\Public Documents\Scribe\Collaborations.
2. Open Scribe Console.
3. Expand **Site Name**, expand **Administration**, and select **Security**.
4. On the **File Management** tab, move the **Collaborations** folder to the **Console Shared Folders**, and click **Save**.



5. Click the **Message Queues** tab.
6. Move the following queues to **Shared Message Queues**:
   - **ScribeDeadMessage**
   - **ScribeIn**
   - **ScribeRetry**



7. Click **Save** and close Scribe Console.

Stop Scribe Services

At this point, Scribe Services must be manually stopped. After you have configured Shared Message Queues, close all Scribe applications and stop all Scribe services on all systems that are used in your integration. Stopping services helps to avoid resource contention, which can cause performance problems among the failover nodes.

Note An error may occur if you do not stop Scribe Services in the recommended order.

To stop Scribe Services

1. In the Windows Services window, locate the **Scribe Services**.
2. Stop each service in the following order:
   a. **Scribe MonitorServer**
   b. **Scribe MessageServer**
   c. **Scribe EventManager**
   d. **Scribe BridgeServer**
   e. **Scribe AdminServer**

Change the Scribe Insight server name

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

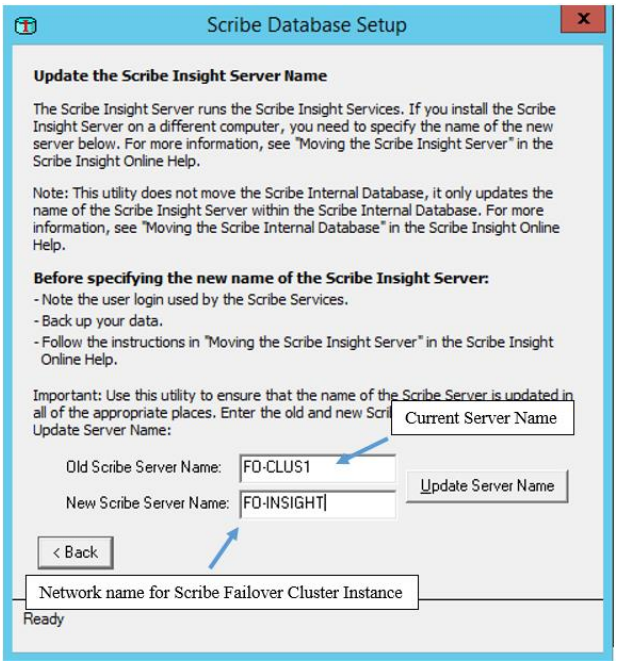
1. Run **InternalDB.exe** from the Scribe installation directory (C:\Program Files (x86)\Scribe\InternalDB.exe).
2. Click the **Internal Database** tab.
3. Click **Test Connection**. The connection to the database validates.

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

4. Click **Update Insight Server Name**.
5. In the **Change Scribe Insight** section, enter in **Old Scribe Server Name** the local computer name in uppercase letters. Verify that this name is spelled correctly.
6. In **New Scribe Server**, enter the Scribe cluster network name. You define this cluster network later in the installation process.

   Notes
   - The name must be in all uppercase letters, and no longer than 15 characters for the Scribe MessageServer works correctly.
   - Be sure to write down the new name for later use.

7. Click **Change Server**.
8. Click **OK**. The New Scribe Server Name reflects the network name that you will give to the Scribe failover cluster instance.
9. 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

The Scribe installation paths must be identical on both nodes of the cluster.

Install Scribe Insight on Node 2

1. Log in to **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. On the Optional Components window, click **Next** without selecting anything.
6. On the Ready to Install window, click **Install** to begin the installation.
7. After Scribe has installed successfully, click **Finish**. The Scribe Database Setup dialog box appears.

Connect to the Scribe Internal Database

1. 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.

Configure the Scribe Services account on Node 2

1. In the **Microsoft Services** applet, do the following for each Scribe service:
   - **Scribe AdminServer**
   - **Scribe BridgeServer**
   - **Scribe EventManager**
   - **Scribe MessageServer**
   - **Scribe MonitorServer**

   a. Right-click the service and select **Properties**.

   b. On the General tab, set **Startup Type** to **Manual**.

   c. Click the **Log On** tab.

   d. Select **This account**, and enter the **name** and **password** of the Scribe Services account.

2. Open the Server Manager.
3. Expand **Configuration**, expand **Local Users and Group**, and select **Groups**.
4. Select the **Scribe Console Users** group.
5. Add the **Scribe Service Windows** account and any other users that require access to the Scribe Console.
6. Log off and log in to the server as a user in the Scribe Console Users Group.

Configure a Cluster to run Scribe

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

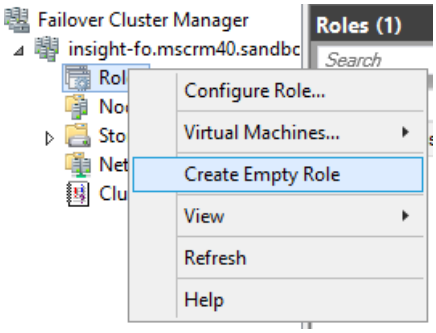
- A network name for the Scribe failover cluster instance
- A shared disk
- The five Scribe Services
- MSMQ

Notes

- If MSMQ is not installed, you will see a message during the Scribe Insight installation stating it is not installed. You must install MSMQ separately. It is not installed as part of the Scribe Insight installation.
- If using MSMQ, your machine name must be no longer than 15 characters.

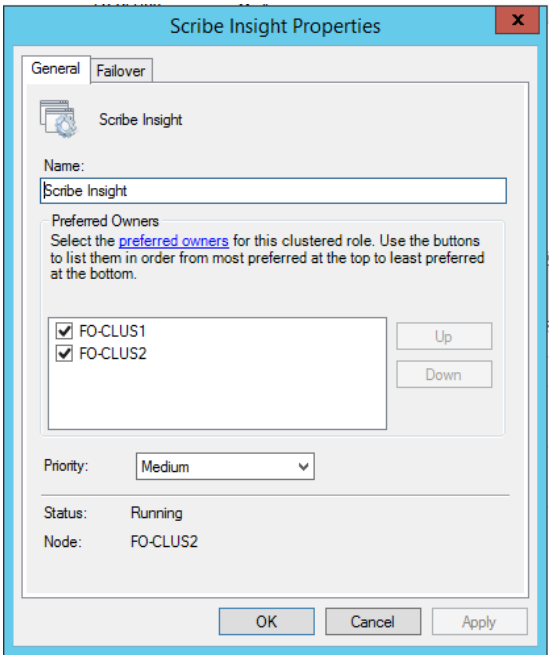
To create and configure the Scribe Insight cluster

1. Click **Start > Administrative Tools > Failover Cluster Manager**. The Failover Cluster Manager Console opens.
2. Right-click **Roles** and click **Create Empty Role** to create a new role.



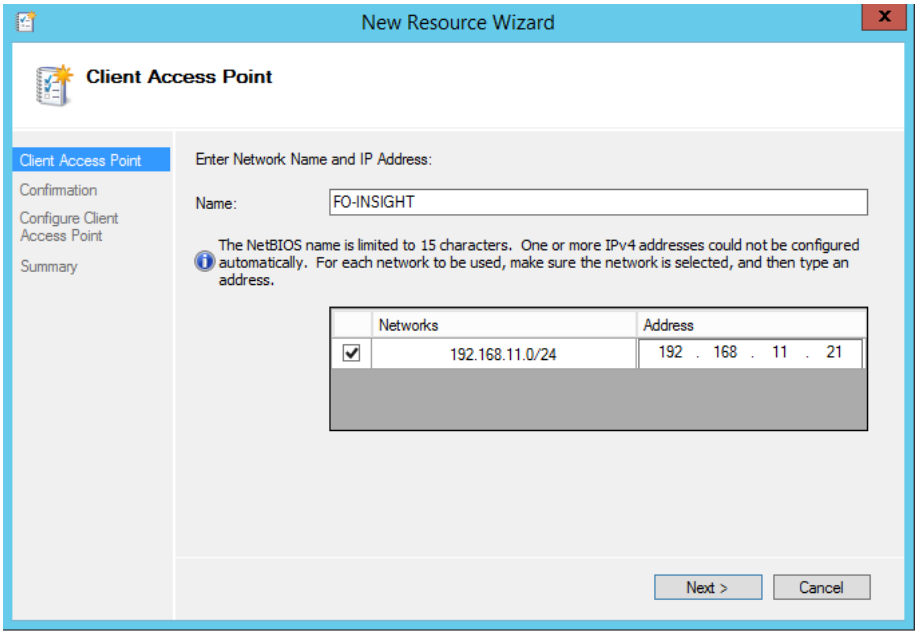
3. Right-click **New Role** and select **Properties**.

4. On the **General** tab, change the **Name** to **Scribe Insight** and select the preferred owner of the cluster, then click **OK**.

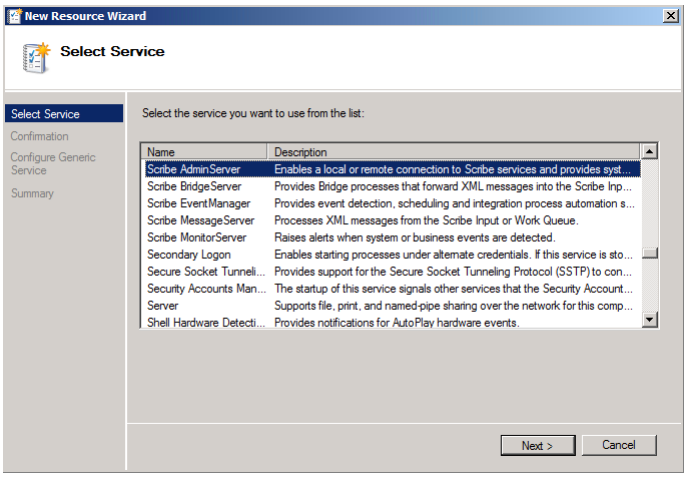


5. In the Failover Cluster Management Console Services and Roles window, right-click **Scribe Insight**, select **Add resource**, and click **Client Access Point**.
6. In **Network Name**, enter the New Scribe Server Name you set in the InternalDB.exe and **IP Address** for the Scribe cluster instance. Click **Next**.

Note To ensure that the Scribe MessageServer works correctly, the Scribe server name cannot be longer than 15 characters.



7. From the Roles window, right-click **Scribe Insight**, select **Add resource**, and click **Generic Service**.
8. Add each of the following Scribe Services:
   - **Scribe AdminServer**
   - **Scribe BridgeServer**
   - **Scribe EventManager**
   - **Scribe MessageServer**
   - **Scribe MonitorServer**



9. Right-click **Scribe Insight**, click **Add storage**, and select the disk(s) to use with the Scribe Failover Cluster, which is used as the Scribe Collaboration Drive.
10. From the Roles window, right-click **Scribe Insight**, select **Add resource**, **More Resources** and click **Message Queuing**.

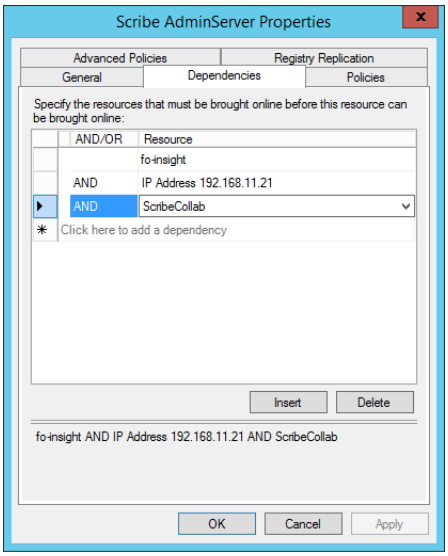
Note You must add the **Shared Disk**, **IP Address** and **Network Name** as dependencies for MSMQ to work properly.

---

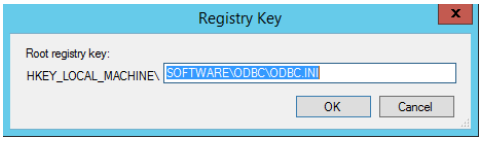
11. Click the **Scribe Insight** role and select the **Resources tab** for the list of resources added for the **Scribe Insight** role.

12. Right-click each of the following and select **Properties**:

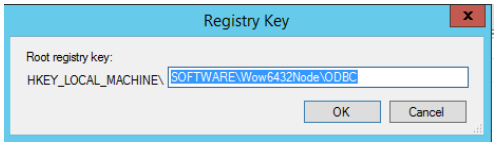
- **Scribe AdminServer**
  a. Click the Dependencies tab.
  b. Add the Shared Disk, IP Address, and Scribe Virtual Server Name.
  c. Click **Apply**.



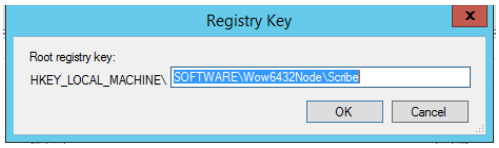
  d. Click the Registry Replication tab.
  e. Enter the following registry keys:
    - **SOFTWARE\ODBC\ODBC.INI**



    - **SOFTWARE\Wow6432Node\ODBC**

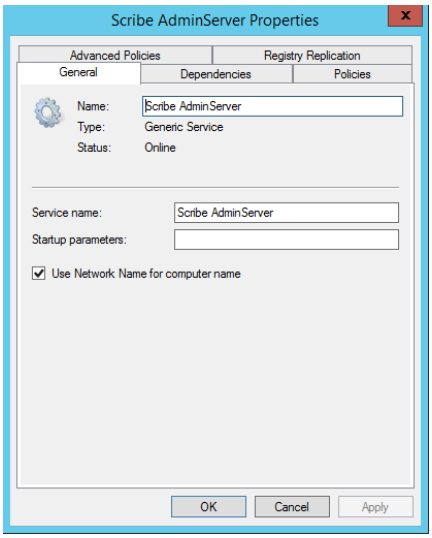


    - **SOFTWARE\Wow6432Node\Scribe**



  f. Click the **General** tab.

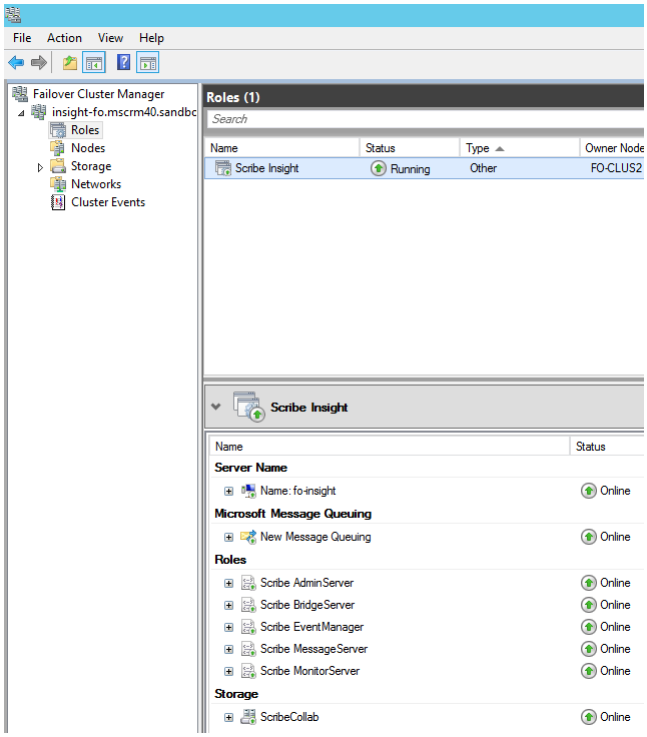
g. Select the **Use Network Name for computer name** checkbox.



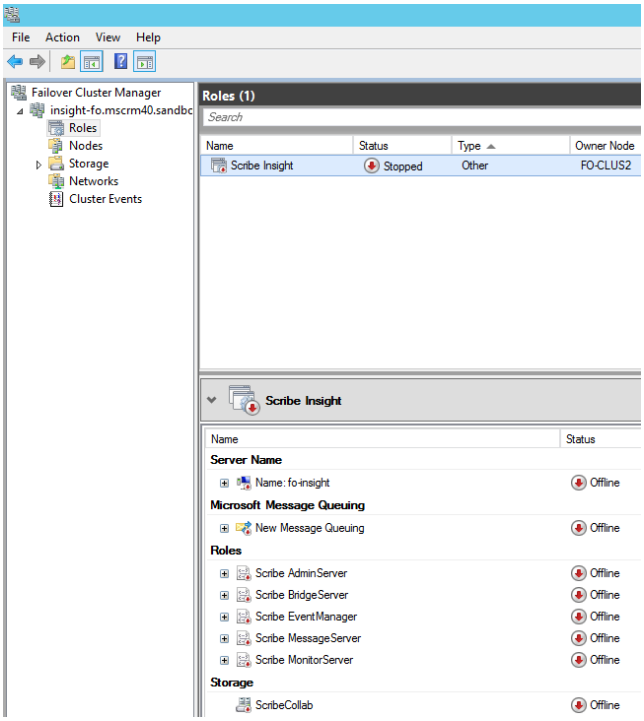
- **Scribe BridgeServer**
  a. Click the **Dependencies** tab.
  b. Add the Shared Disk, IP Address, Scribe Virtual Server Name, MSMQ, and Scribe AdminServer, and click **Apply**.
  c. Click the **General** tab.
  d. Select the **Use Network Name for computer name** checkbox.
- **Scribe EventManager**
  a. Click the Dependencies tab.
  b. Add the Shared Disk, IP Address, Scribe Virtual Server Name, and Scribe AdminServer, and click Apply.
  c. Click the General tab.
  d. Select the **Use Network Name for computer name** checkbox.
- **Scribe MessageServer**
  a. Click the Dependencies tab.
  b. Add the Shared Disk, IP Address, MSMQ, Scribe EventManager, Scribe Virtual Server Name, and Scribe AdminServer, and click Apply.
  c. Click the General tab.
  d. Select the **Use Network Name for computer name** checkbox Scribe MonitorServer.
- **Scribe MonitorServer**
  a. Click the **Dependencies** tab.
  b. Add the Shared Disk, IP Address, Scribe Virtual Server Name, and Scribe AdminServer, and click **Apply**.
  c. Click the **General** tab.
  d. Select the **Use Network Name for computer name** checkbox.

Take 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** and click **Start Role**.



3. Right-click **Scribe Insight** and click **Stop Role**. Verify that Scribe Insight is offline.



Run the FailoverMove.sql script

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

Register Scribe on Node 2

Open Scribe Workbench, register Scribe using your Professional or Enterprise license key, then close Scribe Workbench.

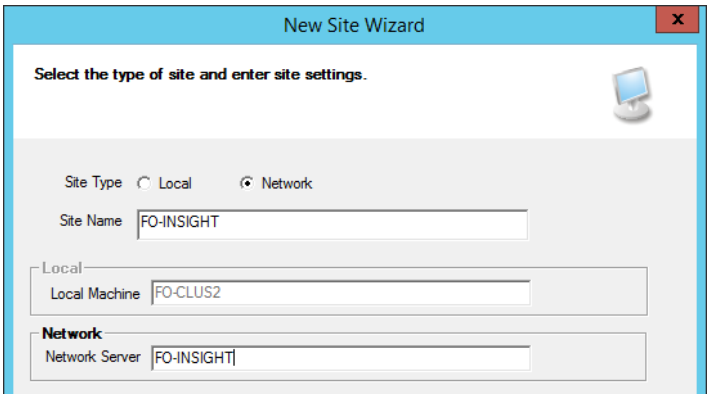
Add the network site to Scribe Console for Node 2

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

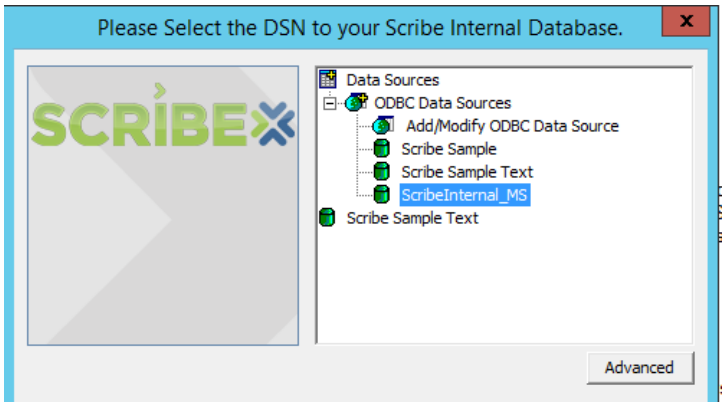
Note If there is no site in the Console Root to delete, proceed to the next step.

---

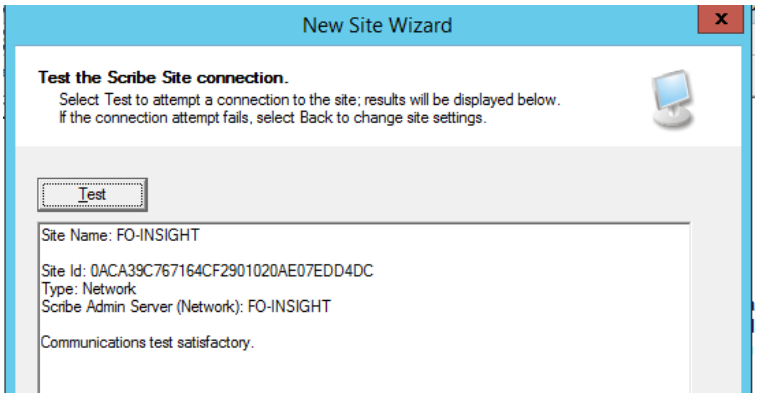
3. Right-click the **Scribe Console** icon in the Console Root and click **Add New Site**.
4. Use the New Site Wizard to add the new network site. Enter the network name (Client Access Point) for the Scribe cluster instance in the **Network Server** field and click **Next.**



5. Expand **ODBC Data Sources**, select the **ScribeInternal_MS**, and click **OK.**



6. Select **Test** to confirm that the connection works.



7. Click **Finish.** The Scribe Console opens.
8. Select **Site Name**, select **Administration**, and select **Site Settings**.
9. In Collaborations, configure the Collaborations root directory.
10. In Site Main Queues, configure the following queues:
    - Scribe Input Queue
    - Scribe Retry Queue
    - Scribe Dead Message Queue
11. Take the Scribe cluster offline.

Moving and Testing the Scribe Cluster

1. From Failover Cluster Management Console, move the **Scribe Insight** role to **Node 1**.
2. Bring the Scribe cluster instance online.
3. Open the Scribe Console.
4. From the Scribe Console, right-click the site name in the **Console Root** and click **Delete site**.
5. Right-click the **Scribe Console** icon in the Console Root and click **Add New Site**. The New Site Wizard appears.
6. Add the new network site using the network name for the Scribe cluster instance.
7. Click **Finish**.
8. Create an integration process in Scribe Console.
9. Move the application from one node to the other.
10. 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. See Take the Scribe Cluster Online and Offline.
2. Log into **Node 1**.
3. Run the Insight installer for the latest version of Insight. See Installing Scribe Insight on Node 1.
4. After the installation completes, open Scribe Workbench and re-register, then close Scribe Workbench. See Re-registering Scribe.
5. Set the following Scribe services to start manually:
   - Scribe AdminServer
   - Scribe BridgeServer
   - Scribe EventManager
   - Scribe MessageServer
   - Scribe MonitorServer

   See Configure Scribe Insight Services.
6. Log into **Node 2**.
7. Run the Insight installer on Node 2.
8. 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.

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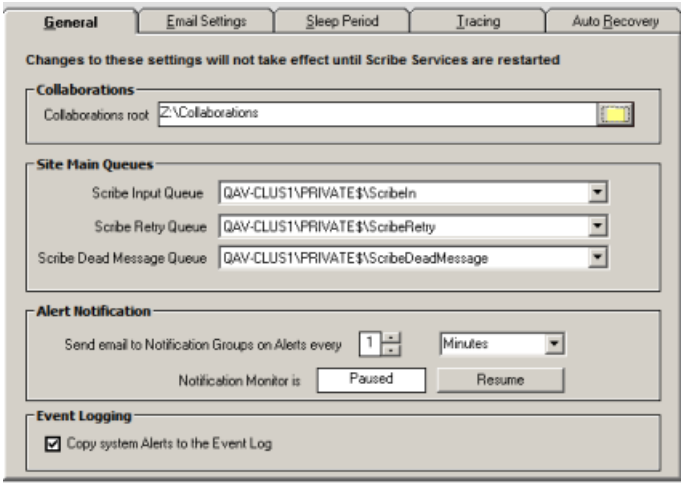
9. Open the Scribe Console.
10. Select **Site Name**, select **Administration**, and select **Site Settings**.



11. In Collaborations, configure the Collaborations root directory.
12. In Site Main Queues, configure the following queues:
    - Scribe Input Queue
    - Scribe Retry Queue
    - Scribe Dead Message Queue
13. Click **Save**.
14. Bring the Scribe Cluster Service back online.

Your Scribe Insight installation is complete.

10. Installation Checklists

This section provides the checklists for Scribe installation and update with the most common features. These sections do 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.

Installation Checklist

Step	Task	Page	✓
Prepare SQL Server			
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.	4	
3	Configure the authentication method for SQL Server ▪ For SQL Server Authentication ▪ For Windows Authentication	 8 35	
Installation Steps			
Install Scribe Software			
1	Download and unzip the Scribe installer. **Note:** 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).	10	
2	Run **Setup.exe** to open the Scribe Insight Setup window.		
3	Verify the following prerequisites are installed: ▪ Microsoft Windows Installer 3.1 ▪ Microsoft .NET Framework 4.0 ▪ Microsoft .NET Framework 3.5 (Windows 2012 only) ▪ Microsoft SQL Express 2012 (optional)		
4	Run **Setup.exe** and select **Install Insight**.	12	

Step	Task	Page	✓
5	At the **Product Selection and Destination** window, select **Insight Server**.	9	
6	Click **Install**, follow the prompts to install the program and components, read and accept the license agreements, and click Finish to close the Setup Wizard Completed window.		
Set up the Scribe Database			
1	After Scribe is installed, the **Scribe Database Setup** window displays. Select the authentication method you configured in the SQL Server preparation step. **SQL Server Authentication:** Select **SQL Server authentication** and enter the password for either the SA user created when you installed SQL Server Express or the SA password for your SQL Server installation. **Windows Authentication:** Select **Windows authentication using the network login ID**.	13	
2	**Optional**. Use **Database Settings** to change the locations of: ▪ Scribe Internal data file ▪ Transaction log file		
3	**Optional**. Create a Scribe sample database.		
Install adapters			
1	If you selected Insight Adapters during the initial installation, the **Adapter Installation** window displays.	14	
2	If you are installing adapters outside of installing Scribe, run **Setup.exe**, select **Insight Adapters**, and click **Start Installation**.		
3	Select the adapter(s) you want to install, click **OK**, and follow the instructions in the Setup Wizard for each adapter.		
Configuration Steps			
Register Scribe			
1	Verify that you have your Scribe serial number available.		
2	Start the Scribe Workbench and follow the directions in the Scribe Registration Wizard to register your Scribe products.	17	
Add Users to the Scribe Console Users Group			
1	Add all local and network Windows users to the Scribe Console Users group that you want to access the Scribe Console.	45	
2	Log off the computer and log back in to have the changes to the Scribe Console Users group take effect.		

Step	Task	Page	✓
Optional. Create Scribe Console Admins Group and add administrative users			
	This is only necessary if any users require remote access to the Administration node in the Scribe Console.		
1	Create the Scribe Console Admins Group (Administrator privileges required).	18	
2	Add any users to the group who require access to the Scribe Console **Security Settings** node.		
Manage Security Settings			
1	Start the Scribe Console.	18	
2	In the Security Settings window, on the **File Management** tab, select **Provide access to SELECTED folders on this server.**.		
3	From the program location (default: C:\users\Public), add the following folders to the **Console Shared Folders** list: ▪ **Collaborations** ▪ **Samples** ▪ **Templates** ▪ **Tracing** ▪ **Utilities**		
4	Consider giving access to these other locations: ▪ Event file locations for any Integration Processes ▪ Application path, the location of pre/post programs used in integration Processes ▪ Other folders that you wish to share across Collaborations		
5	Save your changes.		
6	On the **Services** tab, move the Scribe services from the **All Services** list to the **Shared Services** list.	20	
7	Click **Save** to save your changes.		
8	**Optional**. If your site is using message queues, on the **Message Queues** tab, move the three Scribe queues from the **Known Message Queues** to the **Shared Message Queue**, and save your changes.		
Configure Notification Groups			
1	In the Scribe Console, add the name of the user you want to be notified, specify at least one contact address and the alert types for which to send notifications.	20	
2	Add this recipient to the DB Admin and System Admin groups.		

Step	Task	Page	✓
Configure Site Settings			
1	From the Scribe Console, expand the **Administration** node, and select **Site Settings**.	21	
2	**Optional**. Change the Collaboration Root Location on the **General** tab.		
3	Configure the email settings for the server that determine which mail server will distribute the outgoing alerts.		
4	Set the sleep period to coincide with backup operations.		
5	Start the Notification Monitor.		
Start the Remaining Monitors			
1	Expand the **Integration Serve**r node and select **Monitoring**.	22	
2	Select each of the system monitors and click **Resume**.		
Create the ScribeIn Queue Monitor (Optional)			
1	If your site uses message queues, create a ScribeIn Queue Monitor.	23	
2	In the **General Settings** tab, select: ▪ **Monitor Type** — Queue ▪ **Monitor Name** -- ScribeIn Queue Detail		
3	On **Step 2: Source Connection**, select **Scribe Input Queue**.		
4	On **Step 3: Alert Criteria**, select the alert criteria you want.		
5	On **Step 4: Monitor Interval**, set the **Monitoring Interval Settings** to Monitor every 15 minutes.		
6	On **Step 5: Activation**, select **Status – Active**.		
7	Click **Step 6: Alerting**, select Critical.		
Optional. Create a User for the Scribe Services			
	Scribe suggests that you create a Windows account to be used by the Scribe services: ▪ Give this account the necessary access on the local computer and on other computers on the network. ▪ Change the properties on the Scribe services to log on as this account. ▪ If Scribe processes need access to remote file servers or a network system, set up a specific user account with access to the remote files. Run the Scribe services under this user.	24	

Upgrade Checklist

Step	Task	Page	✓
Backup the Collaborations Folder			
1	Pause all Publishers and any Integration Processes.	28	
2	Export the Scribe Package.		
3	Check the size of the following and run **ScribeMaintenance.sql** if they contain a large number of records: ▪ AlertLog ▪ ExecutionLog ▪ TransactionErrors ▪ Any rejected row tables		
4	Contact your Database Administrator about backing up the Scribe Internal Database.		
5	Copy the **Collaborations** folder.		
Serial Number			
1	Copy the **Serial Number** value and save it in Notepad.	28	
2	Unregister the Computer.		
Stop the Scribe services			
1	End the **Scribe.UpdateService.exe** process.	28	
Pre-Installation			
1	If you are updating Scribe Insight from a version prior to 7.6.2, verify that UAC is disabled.	28	
2	If you are running an adapter that requires Windows Identity Foundation (WIF), do one of the following to install WIF on your operating system: ▪ Windows Server 2008 – Install the appropriate version of WIF ▪ Windows Server 2012 – Enable/Install WIF 3.5 via Features		
3	If WIF is installed but Microsoft .NET Framework 3.5 is not installed, do one of the following: ▪ Windows Server 2008 – Install .NET 3.5 Framework if necessary ▪ Windows Server 2012 – Enable/Install .NET 3.5 Framework via Features		

Step	Task	Page	✓
4	If you are using the Dynamics AX, Dynamics CRM, Dynamics GP, Dynamics NAV, or Query Publishers, install the Microsoft Message Queue (MSMQ).		
Install Insight and Adapters			
1	If you are updating from Scribe Insight 6.4.0 or earlier, uninstall Insight.	29	
2	Download and unzip the Scribe installer.		
3	Open the Scribe Insight Setup window and verify the following prerequisites are installed: ▪ Microsoft Windows Installer 3.1 ▪ Microsoft .NET Framework 4.0 ▪ Microsoft .NET Framework 3.5 (Windows 2012 only) ▪ Microsoft SQL Express 2012 (optional)		
4	Restart your computer and open the Scribe Insight Setup window again.		
5	Select **Insight Server** and **Insight Adapters**, then click **Start Installation**. If you are installing multiple adapters, each Setup Wizard starts as soon as the previous installation finishes.		
Install Adapters Separately			
1	If you are installing adapters outside of installing Scribe, run **Setup.exe**, and select **Insight Adapters**.	29	
2	Click **Start Installation** to display the Adapter Installation window.		
3	Follow the instructions in the Setup Wizard to install each adapter. If you are installing multiple adapters, each Setup Wizard starts as soon as the previous installation finishes.		
Scribe Internal Database			
1	If the Scribe Internal Database will remain on the current server, choose the option to **upgrade the existing DB**.	31	
2	If the Scribe Internal Database is being restored to a new server, install a new Scribe Internal Database and restore the existing Scribe Internal Database to the new SQL Server.		
3	Run **Program Files (x86)/Scribe/InternalDB.exe**, then run the **Update Database** option.		

Step	Task	Page	✓
Post-Installation			
1	If Scribe was installed on a new server, correct the server references in the Scribe Internal Database: run **Program Files (x86)/Scribe/InternalDB.exe**, perform a **Test connection**, specify the option to change the server name, and provide the old and new Scribe server names.	31	
2	Register Scribe through the Workbench.		
3	If you have issues registering Scribe, run **ClearScribeLicense.sql**.		
4	Verify that the Scribe services LogOn user is a domain account that belongs to the local Administrators and Scribe Console User groups.		
5	Restart the Scribe Services.		
6	See the Adapter Help for any post-installation steps. For example: ▪ Dynamics GP – Run metadata SQL scripts. ▪ Dynamics NAV – Update the FOB files, etc.		
7	If you are upgrading to an X.0 version, open the DTS to upgrade it.		
Troubleshooting			
	If you are installing Scribe or the Scribe Internal Database on a new server, some problems that you may find are: ▪ UAC is disabled. ▪ Scribe Services Logon User should be a domain account that belongs to the local Administrators group and the Scribe Console User groups. ▪ Server name is correct in the various fields for the IntegrationServers, Ksync, and Monitors tables. ▪ Verify Path is correct in the Ksync table (CollaborationsRoot - KEYVALUE) ▪ If you are using Windows Authentication for the Scribe Internal database, verify the service logon user (db_owner) has permissions for the Scribe Internal database. ▪ Run **ClearScribeLicense.sql** and reregister in the Workbench.	32	

11. 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).

Note Before you register Scribe, make you have your Scribe serial numbers available.

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.