



## **Scribe Insight 6.5**

---

*Release Overview and Technical Information- Version 1.0*

*April 7, 2009*

[www.scribsoft.com](http://www.scribsoft.com)

## Contents

---

What is Scribe Insight? .....	3
Release Overview .....	3
Product Management Process – Customer and Partner Feedback Counts! .....	3
New Features in Insight 6.5 .....	4
Failover/Disaster Recovery (OpenMind Idea 78) .....	4
Scribe Web Services Adapter .....	5
Support for Windows Authentication when connecting to the SCRIBEINTERNAL database (OpenMind Idea 26) .....	6
Support for 64-bit Windows 2008 Server (OpenMind Ideas 72 and 84) .....	7
Added Regular Expression functions to Scribe Workbench Formula Editor (OpenMind Idea 20) .....	7
Enhanced Step Copy feature to also copy Data Links and Lookup Links (OpenMind Idea 38) .....	8
Removed requirement for data links – data links not required to insert to target (OpenMind Idea 71) .....	8
Added ability to update a source field with dynamic values (OpenMind Idea 76) .....	9
GetRowError() function added in Formula Editor (OpenMind Idea 57) .....	9
Added ability to refresh data without having to close and re-open the Workbench (OpenMind Idea 80) .....	9
Added ability to rename target steps (OpenMind Idea 88) .....	10
Links for user ideas and suggestions in Scribe Workbench and Scribe Console .....	10
Defects Addressed in Scribe Insight 6.5 .....	11
Upgrading to Scribe Insight 6.5 .....	11
Frequently Asked Questions .....	12
Scribe Insight 6.5 System Requirements .....	13
Supported Operating Systems .....	13
Prerequisite Microsoft Windows Components .....	13
Supported SQL Server Versions/Editions .....	13
Supported SQL Server Collation Orders .....	14

## What is Scribe Insight?

---

Scribe Insight is Scribe's data migration and integration solution used for one time data migrations and ongoing batch or real time integrations between databases, file data, business applications, Software-as-a-Service platforms and more. Scribe Insight consists of three major components:

1. The **Scribe Server** is the core engine of Scribe Insight and is responsible for the execution and scheduling of the exchange of data between two or more data sources. Underlying the Scribe Server are a number of Windows services designed to monitor and detect events, process messages, raise alerts, and more. The Scribe Server also includes its own internal Microsoft SQL Server database that stores all execution and error logging, persisted integration settings, cross reference tables, and important integration statistics.
2. The **Scribe Workbench** provides a graphical environment where users design and configure the data mappings and business rules that define the migration or integration solution. All work completed in the Workbench is saved in a lightweight file that is referenced by the Scribe Server at run-time. This self-documenting, metadata driven model allows for easy debugging during the deployment phase and rapid modification as the application environment or business needs change.
3. The **Scribe Console** is Scribe's administrative interface and provides an array of features used to set-up, schedule, organize, manage and report on key aspects of integration processes. At the core of the Console are its sophisticated event management capabilities. The Console allows each company to precisely define the proper latency for each integration process using a variety of mechanisms such as:
  - Batch processes scheduled to run on a pre-defined time period
  - Polling intervals to detect a file copied to a directory
  - Real-time processing of changes to data in an application database
  - Real-time processing of messages arriving in a message queue.

## Release Overview

---

Scribe Insight 6.5 adds a number of significant pieces of functionality focused in two main areas:

1. **Enterprise:** The growing demand for Scribe Insight in larger, enterprise deployments demands greater emphasis on system up-time, disaster recovery, extended connectivity, and scalability. Scribe 6.5 adds Failover/Disaster Recovery, Support for 64-bit Windows 2008 Server and a Web Services adapter to address the needs of larger and more complex deployments.
2. **Usability/Flexibility:** Scribe 6.5 adds many new capabilities focused on making the application more usable and flexible for customers and partners.

## Product Management Process – Customer and Partner Feedback Counts!

---

The process for determining new functionality to include in any Scribe release begins with Scribe's interactive knowledgebase and product feedback portal **OpenMind** (<https://openmind.scribesoftware.com>). Scribe OpenMind is part of the Scribe web site and includes a

searchable knowledgebase, interactive forums, product feedback capability (with voting) and polls. Scribe users, both customers and partners, can submit product suggestions called 'Ideas'. Scribe users are also able to vote on others' Ideas they value as well as watch Ideas that are of interest to them. Scribe's internal Product Management and Development teams consider all submissions, particularly those which show broad community support as evidenced by the votes each Idea receives. Voting for Ideas in OpenMind allows users to directly influence the Scribe product roadmap. Request an account today at [https://openmind.scribesoftware.com/user\\_requests/new](https://openmind.scribesoftware.com/user_requests/new).

## New Features in Insight 6.5

---

This section lists the major features added in Scribe 6.5 and provides details on each of them.

### Failover/Disaster Recovery (OpenMind Idea 78)

---

Failover is the ability to automatically switch to a redundant or standby computer server, system, or network upon the failure or abnormal termination of the previously active server, system, or network.

Using Microsoft clustering technologies, Scribe Insight 6.5 can be configured to automatically switch to a second standby instance of Scribe Insight should the primary instance fail. The backup instance is kept in parity with the production instance so the switch from the primary to the secondary server does not cause a loss of data or functionality.

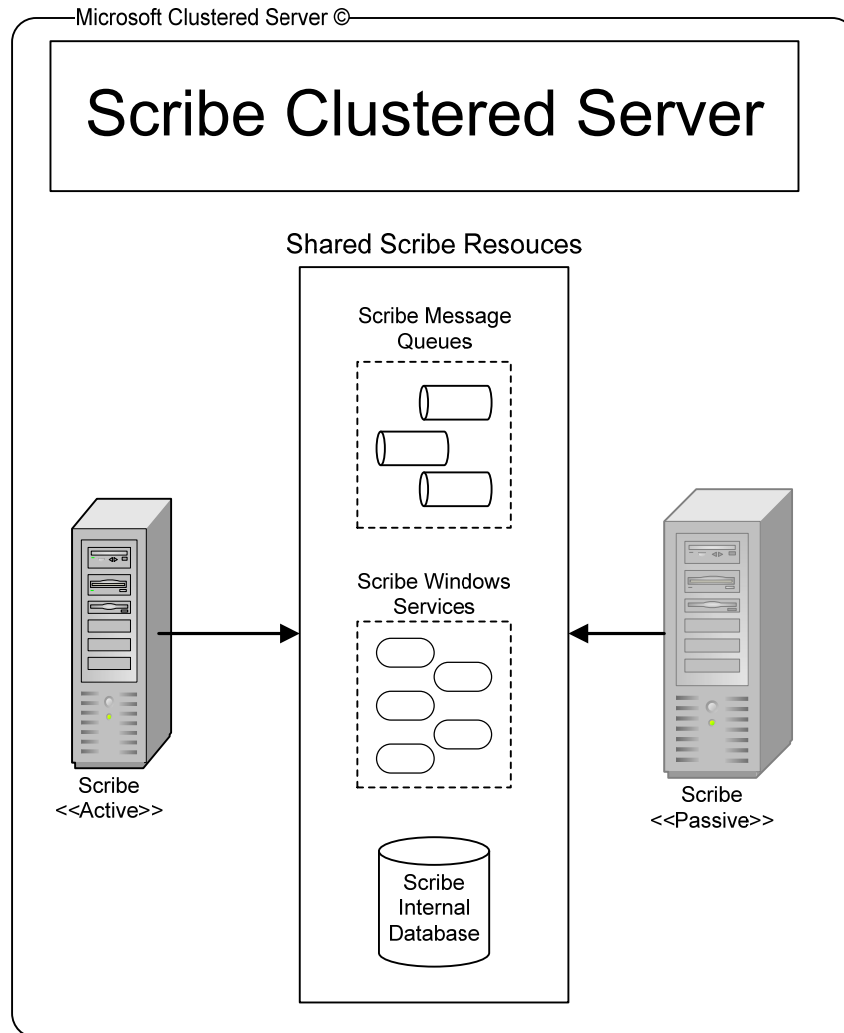
The Scribe Failover solution is built upon Microsoft's Clustered Server technology. Clustered Server provides a virtual reference for physical machines in a cluster, so that clients using a specific physical machine reference it by its virtual, and not physical name. This allows Clustered Server to resolve a request for a virtual name to a specific physical machine with minimal to no impact to the requesting servers. For more information on Clustered Server, refer to Microsoft's technical overview found here:

<http://www.microsoft.com/windowsserver2003/technologies/clustering/resources.msp>

Scribe's Failover solution uses the active/passive configuration of Clustered Server. In this configuration, Clustered Server periodically checks the health of the active node. If Clustered Server determines that the active Scribe node is not available, future work requests will be routed to the appropriate passive Scribe node. For more information on the active/passive configuration, refer to the Microsoft technical overview found here:

<http://technet.microsoft.com/en-us/library/cc759183.aspx>

For seamless transition between the active and passive nodes, these nodes need to have some concept of shared information. In other words, the active and passive node solution concept does not represent a back up or snapshot strategy. Instead, both active and passive nodes share the same information. This information is managed by Cluster Server through shared resources. The graphic below provides a visual representation of this concept.

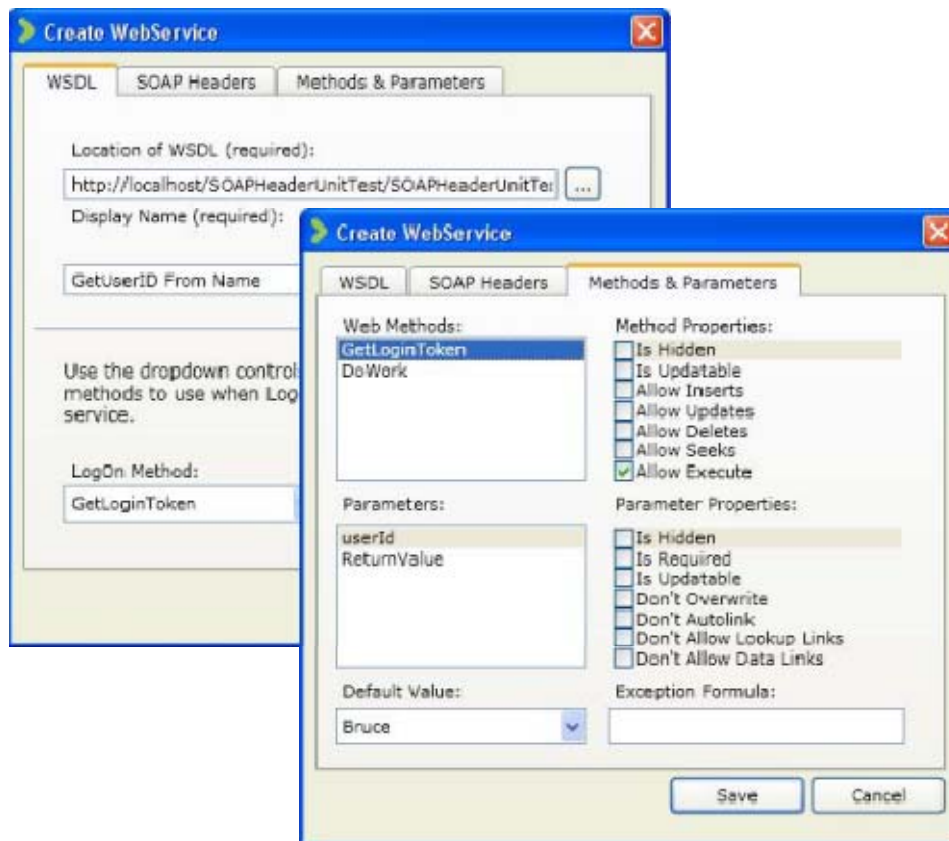


For more information on Scribe Insight's failover feature you may refer to the Scribe document "Scribe Best Practices – Failover Configuration" located at <https://openmind.scribsoftware.com/download/FailoverBestPractice>.

## Scribe Web Services Adapter

**Note:** the Scribe Web Services Adapter is included with Scribe Insight Enterprise Edition and may be purchased separately with Scribe Insight. To see the differences between the Scribe Insight and Insight Enterprise refer to the Frequently Asked Questions (FAQ) section of this document.

In conjunction with the release of Scribe Insight 6.5, Scribe has released a Web Services adapter enabling migration and integration with any application or data source that exposes a Web Services Application Programming Interface (API). This capability enables users to design integration processes where the source and/or target application is exposed via a standard Web Services interface. The interaction between a Scribe process and a Web Service can be configured through metadata, thus eliminating the need for custom coding that is difficult to upgrade and maintain.



**Figure:** Identifying a Web Service, its methods and properties from within the Scribe workbench

Many Scribe customers integrate to legacy and customer applications and have requested the ability to communicate directly with Web Service wrappers they create and expose externally. The Scribe Web Service adapter provides a seamless approach to integrate legacy applications without custom integration code.

Additionally, since many commercial and internal applications expose web service APIs Scribe's addition of a web services adapter allows for integration to these applications through configuration by a Scribe resource rather than custom coding by a Web Services developer.

The Web Service Adapter supports SOAP-based Web Services via http and https. Scribe can connect to Web Services as both a source and a target. The adapter supports SOAP headers, as well as custom exception handling logic.

### Support for Windows Authentication when connecting to the SCRIBEINTERNAL database (OpenMind Idea 26)

When the Scribe solution is installed it creates a Microsoft SQL Server database to persist all executing and error logging, integration settings, cross reference tables, and important integration statistics and metrics. This database is referred to as the SCRIBEINTERNAL database.

In earlier versions of Scribe Insight, the SCRIBEINTERNAL database required access through a SQL Server login only. This approach required that Scribe store the username and password of a database

user in order to establish a connection. As companies become more conscious of secure computing, many have developed IT policies that do not allow for access via a SQL Server login. In Scribe Insight 6.5 the SCRIBEINTERNAL database can be accessed using Windows authentication in addition to SQL Server authentication, thus accommodating extended security policies and simplifying the experience in working with the Scribe application.

## Support for 64-bit Windows 2008 Server (OpenMind Ideas 72 and 84)

---

As larger customers acquire servers with more memory they find it advantageous to also run 64-bit operating systems which allow them to take advantage of large memory spaces. To ensure that Scribe Insight can operate in these large data center environments, Scribe Insight 6.3 added support for 64-bit Windows Server 2003 environments. With the release of Insight 6.5, Scribe Insight now also supports 64-bit Windows Server 2008 environments. Customers now have a choice when it comes to running Scribe in 64-bit environments.

It is worth noting that Scribe leverages the Windows on Windows 64-bit subsystem (WoW64). However, due to the manner in which Scribe leverages multiple processes, thus reducing memory demand, the performance improvement of leveraging native 64-bit instead of WoW64 support would be negligible. Scribe will consider native 64-bit support for a future release.

## Added Regular Expression functions to Scribe Workbench Formula Editor (OpenMind Idea 20)

---

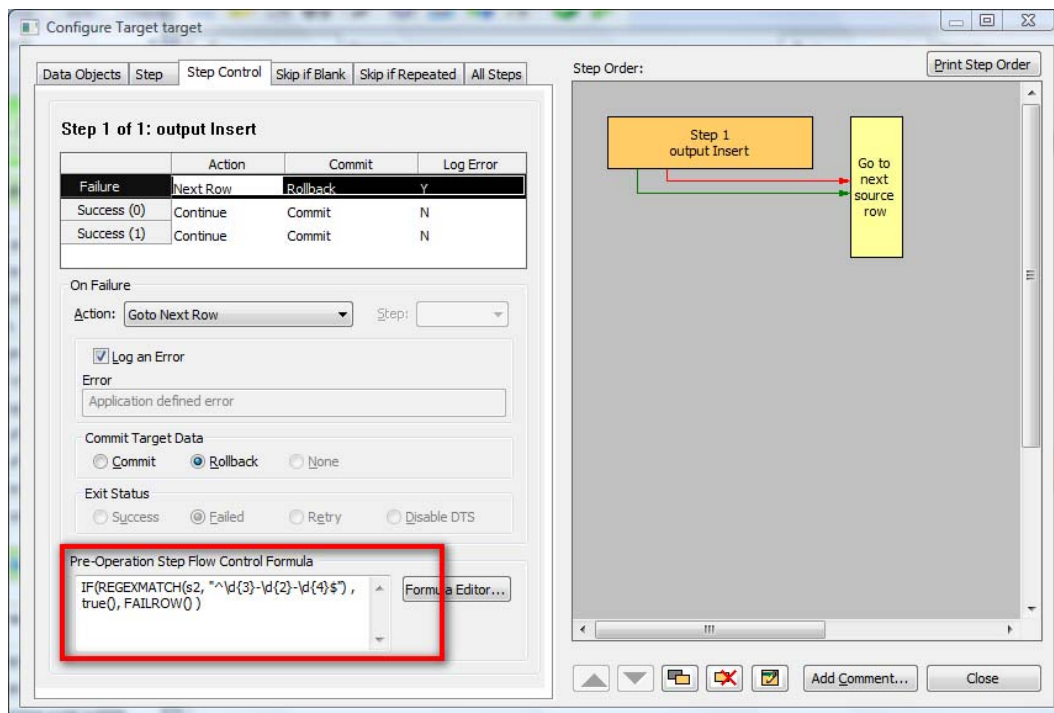
Regular Expressions provide a powerful, concise and flexible means for identifying patterns in strings. For more on the uses of Regular Expressions refer to the [http://en.wikipedia.org/wiki/Regular\\_expression](http://en.wikipedia.org/wiki/Regular_expression) and the Knowledge Base article <https://openmind.scribesoftware.com/topics/522>.

Scribe has implemented Regular Expressions in the Workbench formula editor in the form of two new functions `regexmatch()` and `regexreplace()`. Scribe Insight provides several convenience functions (such as the Scribe StripCompany function) which search for patterns in strings and manipulate those strings according to pre-defined rules. Essentially, `regexmatch()` and `regexreplace()` allow users to build their own string manipulation functions in cases where standard Scribe functions do not provide the required functionality.

The `regexmatch` function can be used to detect the presence of specific text or a pattern in a string. For example, the regular expression “`^\d{3}-\d{2}-\d{4}$`” looks for a string that starts with 3 digits, then a dash, 2 digits, a dash, and finally 4 digits, e.g., the format of a US social security number. `regexmatch` could be used to evaluate a text string and determine whether the format of a social security number is valid. In the Scribe Workbench you could specify a formula such as:

```
IF(REGEXMATCH(S2, "^\d{3}-\d{2}-\d{4}$"), TRUE(), FAILROW())
```

in a pre-operation step flow control formula, which would identify records with poorly formatted social security numbers so they could be rejected. Similar approaches could be used to validate telephone numbers, zip codes, IP addresses, email addresses, etc.



The `regexreplace` function is able to use the same logic as the `regexmatch` function but has the additional functionality of being able to manipulate the string based upon a pattern as defined in the regular expression. For example, if it is necessary to load records with telephone numbers formatted as (800) 555-1212 into a system that requires a format such as 800-555-1212 `regexmatch` could be used. Another potential use of `regexmatch` would be to strip HTML tags from a description field.

### [Enhanced Step Copy feature to also copy Data Links and Lookup Links \(OpenMind Idea 38\)](#)

The Scribe Workbench uses a 'step' concept to allow users to build custom logic related to a data migration or integration. For example, one step could insert a CRM invoice header record and then invoke another step to insert invoice line item records which would be linked to the newly created invoice header record.

In configuring migrations and integrations steps are often similar and, thus, Scribe has a convenience feature which allows users to copy steps. However, until now the data links and lookups did not copy with the step. With the release of Scribe 6.5 all attributes of a step, including data links and lookups, are copied when a step is copied. Users are then able to modify the attributes of the copied step to customize it.

### [Removed requirement for data links – data links not required to insert to target \(OpenMind Idea 71\)](#)

In the Scribe Workbench users are able to create data mappings and data transformations to specify how data will move from a source application or database to a target application or database. These mappings and transformations become part of a Scribe configuration contained in a Scribe Data Transformation Specification (DTS) file.

In some cases, target data sources can be completely populated by default values and, thus, require no source data links to be configured in the Scribe DTS. An example of this would be the population of a target table whose fields have a combination of default values and what Scribe refers to as 'auto foreign



key assignments'. An example of an auto foreign key assignment is the automatic population of an invoice line item's parent invoice's ID in its foreign key (i.e. parent record ID) field.

In past versions the Scribe Workbench did not allow DTS files which had no data links. This requirement has been removed, thus accommodating situations where a DTS requires no data links.

### Added ability to update a source field with dynamic values (OpenMind Idea 76)

Scribe Insight includes a feature to allow updates to fields in the source database or application. However, until version 6.5 only static values could be used. With Scribe 6.5 users can now also define a formula (which can reference a function) to calculate a value which would then update the source field. This can be very helpful when it is necessary to add a date and timestamp to the source record noting the time of the integration. Further, in combination with another feature that is new in 6.5, the `GetRowError()` function (explained in the next section), users can now update source rows with specific error information in the event of an error.

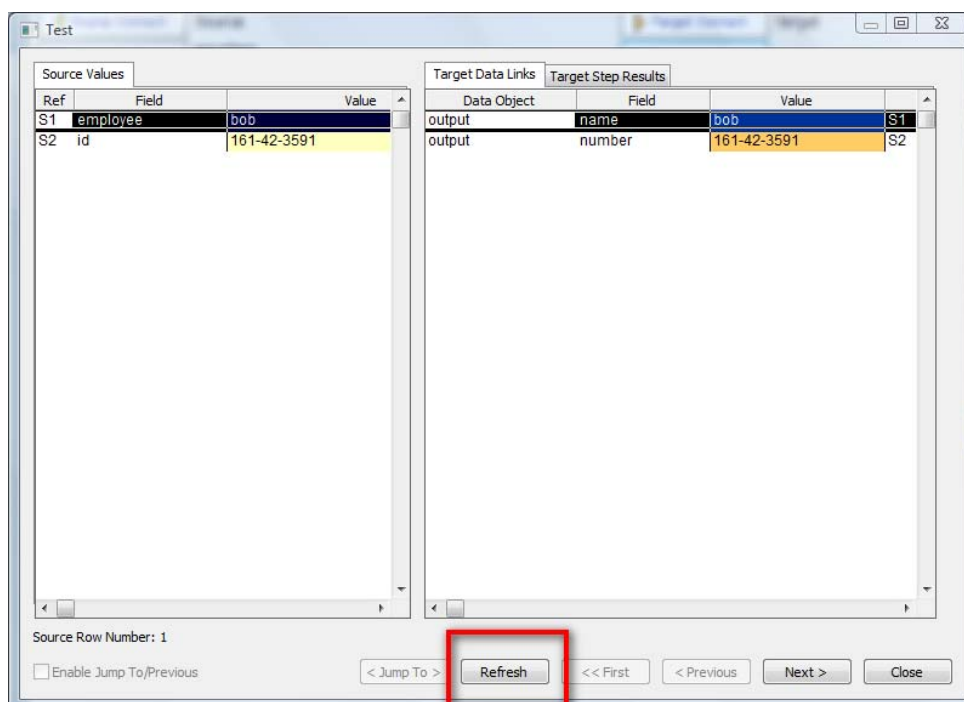
### `GetRowError()` function added in Formula Editor (OpenMind Idea 57)

A new Scribe workbench function, `GetRowError()`, has been added to the Scribe Formula Editor. The `GetRowError()` function returns specific error information for the target operation being processed if an error occurred. If no errors occurred the function returns an empty string.

In conjunction with 6.5's new ability to update a source field with dynamic values, `GetRowError()` can be used to update a field in the source with the error for the target operation. This is useful in capturing specific error information in a data source on a row by row basis.

### Added ability to refresh data without having to close and re-open the Workbench (OpenMind Idea 80)

In the Scribe Workbench, a Refresh button in the Test dialog box allows users to easily refresh source data.

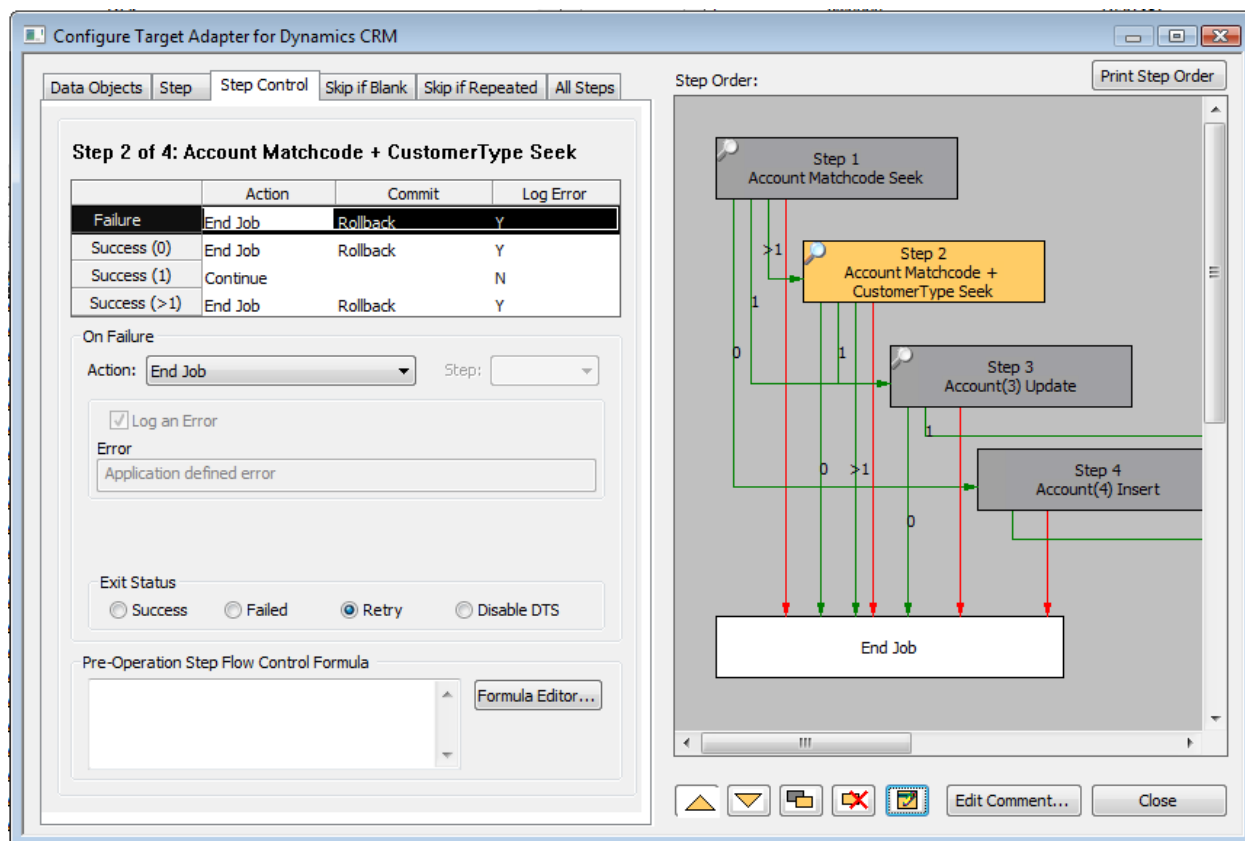


When using the test feature in the Scribe Workbench, a developer can click the “First” button to re-query the source. The user can then begin testing from the first record retrieved. However, if there are no records retrieved, the “First” button is disabled. This created the situation where the only way for a user to cause the source be re-queried was to close and reopen the current Data Transformation Specification (DTS) file. The newly added Refresh button removes the need to close and reopen the DTS file to refresh the source data.

### Added ability to rename target steps (OpenMind Idea 88)

Historically, the Scribe Workbench generated generic names for target steps created by the user. With Scribe Insight 6.5, users can now change the default name to something more descriptive and meaningful.

In Scribe 6.5, when users add an insert step they are given the option of naming the new step and adding a comment. Existing steps can also be renamed and the comments can be edited. This makes for step controls which are easier to understand.



**Figure:** Scribe steps renamed to more clearly describe their usage

### Links for user ideas and suggestions in Scribe Workbench and Scribe Console

Both the Scribe Workbench and the Scribe Console now have convenient links to Scribe’s OpenMind site where users can contribute ideas or suggestions for changes and additions to Scribe’s products. In addition to contributing ideas and suggestions, members of the OpenMind community can review other

members' suggestions and vote on which ideas and suggestions they would like to see Scribe incorporate into an upcoming release.

In the Scribe Workbench, on the Help menu, a new command called Send Product Feedback is now available.

In the Scribe Console, there is now a Send Product Feedback link (in earlier versions of Scribe Insight, this link was labeled "OpenMind").

## Defects Addressed in Scribe Insight 6.5

---

The following defects in Scribe Insight version 6.4 have been resolved in Scribe Insight 6.5. The ticket number represents the Scribe SupportWeb incidents corresponding to each defect.

Ticket Number(s)	Description
<b>28569</b>	Error creating files using the XML adapter on an ftp server with the date appended to the end of the file name
<b>23777, 24198, 25295</b>	Locked Solution License shows Queue Integration Processes but hides Query (other?) IPs
<b>25211</b>	Install Shield Update Service Agent.exe component has memory leak, needs to be upgraded
<b>25603</b>	CSV file as the source in DTS is processing every other row
<b>27203</b>	Calculated user variables that return date fields show up as serialized dates in the test window
<b>26512</b>	Upgrade from Insight 6.3.1 to 6.4.0 leaves old interop files, causing adapter registration to fail
<b>26264</b>	Stored procedure as a source for a query publisher fails in Console
<b>25260</b>	Improved 6.0.9 error handling may cause MessageServer not to start and requires a better error message
<b>27481, 27461, 27936, 27950</b>	Slow Message Processor startup when not running as local admin

## Upgrading to Scribe Insight 6.5

---

The Scribe solution requires the core product, adapters, and ancillary adapter server components (for example, the CRM server components) all be at compatible revision levels. There are opportunities during the installation process to upgrade all of these elements to compatible levels.

**Note:** *if all elements are not upgraded, the entire solution may not function as expected.*

Before installing Scribe Insight 6.5, locate your serial number. Scribe Insight 6.5 requires you to register the software. A serial number is required to register. To obtain a serial number you may contact [sales@scribesoft.com](mailto:sales@scribesoft.com)

To assist you in deploying Scribe Insight, a detailed checklist is available for download at <https://openmind.scribesoftware.com/download/InsightInstallationChecklist>

1. Scribe strongly recommends that you back up the SCRIBEINTERNAL database using the appropriate Microsoft SQL Server management tools before beginning an upgrade.

To backup your SCRIBEINTERNAL database:

- a. Pause all integration processes, bridges, publishers, and monitors. Wait for any pending data to be processed by the Scribe Insight server.
  - b. Backup all files related to your integrations. These could include DTS files, scripts, .ini files. These files are typically saved in C:\Program Files\Scribe\Collaborations and its subfolders.
  - c. Make a note of the user name and password used by Scribe Insight to connect to the SCRIBEINTERNAL database
2. If you are upgrading from Scribe Insight 6.2.2 or earlier, you will need to uninstall the current instance of Scribe and all adapters.
  3. Download and run the file Setup.exe from the Scribe download page (<http://community.scribesoftware.com/downloads/>). Follow the instructions provided by the Scribe installer.
  4. If you are using Windows Vista or Windows Server 2008, right-click Setup.exe, on the shortcut menu, choose Run as Administrator.
  5. Start the Scribe Console or the Scribe Workbench to begin the process of registering the product.
  6. To complete the registration process you will need the serial number provided to you when you purchased the product.
  7. Resume any paused integration processes, bridges, publishers, and monitors that were paused as part of the backup process, above.

## Frequently Asked Questions

---

***My organization currently has Scribe Insight version 6.4 installed and we do not feel we need any of the improvements in Scribe Insight 6.5. Do you recommend we upgrade anyway?***

No. If the functionality of Scribe Insight 6.4 currently meets your business needs it is not necessary for you to upgrade at this time.

***Where can I download Scribe Insight 6.5?***

The latest version of Scribe Insight, all adapters and all templates can always be found at <http://community.scribesoft.com/downloads>

***Who is entitled to an upgrade?***

All Scribe customers who are current on their maintenance are entitled to download and install Scribe 6.5

***Is there an additional cost for Scribe Insight 6.5?***

The Scribe Web Services adapter is included in Scribe Insight Enterprise at no additional charge. For end users of Scribe Insight the Web Services adapter is available for an additional charge.

***Can I upgrade Scribe Insight only or do I need to upgrade my adapters as well?***

With the release of Scribe Insight 6.5 corresponding Scribe adapters have also been released and must be upgraded when Scribe Insight is upgraded. Scribe Insight 6.5 and the compatible adapters are available for download at <http://community.scribesoft.com/downloads>

***What are the differences between Scribe Insight and Scribe Insight Enterprise?***

Scribe Insight Enterprise includes the following features and capabilities beyond Scribe Insight:

- Support for failover (not available in standard edition)
- Web Services adapter included (available at a separate charge in standard edition)
- Scalable to 64 message processors (standard edition supports 8)
- Scalable to unlimited CRM or ERP users (standard edition supports up to 750 CRM and 375 ERP users)
- 3 additional non-production licenses included (non-production licenses for use as test and development servers are available as a separate purchase in standard edition)

## **Scribe Insight 6.5 System Requirements**

---

### **Supported Operating Systems**

---

- Windows Vista Business Edition
- Windows XP Professional with Service Pack 3
- Windows 2003 Server Enterprise/Standard x32 Editions with Service Pack 2
- Windows 2003 x64 Server Enterprise/Standard x64 Editions with Service Pack 2
- Windows 2008 Server Enterprise/Standard x32 Editions
- Windows 2008 x64 Server Enterprise/Standard x64 Editions

### **Prerequisite Microsoft Windows Components**

---

- Microsoft.NET Framework 3.5 Service Pack 1 or later (the Insight installation provides you with an option for installing Microsoft .NET Framework 3.5 if it is not already installed)
- Microsoft IIS 6.0 – if using remote connectivity to the Scribe server via web services
- Microsoft Message Queuing Service (MSMQ) – if using Scribe publishers or Queue Integration Processes

### **Supported SQL Server Versions/Editions**

---

- Microsoft SQL Server 2005 with Service Pack 2
- Microsoft SQL Server 2005 Express Edition
- Microsoft SQL Server 2008

### Supported SQL Server Collation Orders

---

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