

Release Notes

Scribe Insight 6.2.2

Release Date

January 2008

What's new

Added support for parent-child relationships in Query Publisher

Query Publisher now supports parent-child relationships. *Case number 20863.*

Added support for filtering on both parent and child objects

Custom Query window supports filtering on both parent and child objects. *Case number 20355.*

Dropped database connections no longer generate message

Dropped connections to the database no longer generate, “locked source/target adapter – a valid unlock code is required” messages. *Cases number 19453, 18614, 20126, 19850, 19843, 20160, 20069.*

Added support for Boolean conversions

Added registry support to revert Boolean conversion behavior to pre-6.0.9 behavior. *Case number 20247.*

Import/Export now saves connection properties

Import/Export feature now persists connection properties when importing where those connection properties were not part of the export.

Insight Console installation exception resolved

“Install Insight Console Only” when using the 6.2.1 build resulted in an exception appearing in some cases. This exception has been resolved.

Scribe Insight 6.2.1

Support for ACT! 2007-2008

Added Scribe Adapter for ACT! 2007-2008 to take advantage of the features available in the latest version of ACT!

Includes all new Help with easy to read step-by-step instructions for set up and many common tasks.

The Scribe Adapter for ACT! 2007-2008 is not compatible with earlier versions of ACT!

System variables now work in query integration process

When using a system variable in the source query, the variable was not always substituted in the EventManager (although it worked correctly in the Workbench).

System variables now work correctly. *Case number 20253.*

Installation considerations

Some computers may generate the following message when trying to install Insight version 6.2 or 6.2.1,

The Windows Installer Service could not be accessed. You may be running in Safe Mode or Windows Installer may not be correctly installed.

Microsoft addresses this issue and provides instructions for resolving it on its Help and Support site. See,

“Error 1719: The Windows Installer service could not be accessed” error message when you try to add or remove a program. (*Article ID: 315346, Last Review: October 11, 2007, Revision: 14.5.*)

<http://support.microsoft.com/kb/315346>

System error log

Windows XP and Windows 2003 configurations no longer generate numerous system error log entries.

Windows 2000 Server requires manual restart

On some Windows 2000 Server installations, you may be prompted to upgrade Microsoft Visual C Runtime components. This upgrade is required to run Scribe.

After completing the upgrade, you may be prompted to restart the computer. Regardless of whether you choose to reboot now or later, the computer does not reboot. Instead, the install continues and completes successfully.

After completing the Scribe installation, Scribe recommends restarting the computer to ensure a complete installation of all required elements.

Scribe Insight 6.2

Net 2.0

Insight was updated to work with, and require, .NET 2.0.

If you do not already have .NET 2.0, you can download it from Microsoft's Web site (search for ".NET framework download").



Version 6.2 of Insight only works with the most recent versions of the Scribe adapters.

If you are using Insight 6.2, you must upgrade your adapters.

Test window

Values can now be copied from the **Test** window. *Case number 19704.*

Import-export conflicts resolved

Some publishers, such as the Publisher for Salesforce and the Publisher for Dynamics CRM, let you define the objects to be published. Prior to this change, if you had a publisher set up on your Insight server, the import process would delete any existing defined objects and replace them with the objects in the import package.

6.2 adds a **Merge** button to the **Resolve Existing Conflicts** dialog box that matches the name and type of the publisher being imported. You can choose to merge the incoming objects with the existing objects.

6.2 adds a new **Resolve Matching Publisher/Bridge** dialog box that opens when an incoming publisher containing objects matches the type of an existing publisher (and has not already be handled by the above case). The dialog box contains **Skip**, **Import** and **Merge With** options, and includes a list of the name of all existing publishers of the same type as the incoming

publisher. Choose one of these publishers to merge the incoming publisher objects with. You can also skip the incoming publisher or import it in as a new publisher.

Exporting a publisher for Dynamics CRM clears the computer name

When exporting a publisher for Dynamics CRM, the computer name and the message queue names are now cleared from the publisher properties before it is imported.

When you connect the publisher in your environment, the queue names are repopulated using your current computer name.

Export sets “Prompt for reconnect” option when the connection is aliased

When a DTS file is exported as part of a package, if its connection is aliased, the prompt for reconnect option is checked.

If the DTS file has its connection set during the import process, the prompt for reconnect option is cleared.

Previous versions

This 6.2 update is cumulative and contains all the changes for version 6.0.3 through version 6.2. The earlier release notes are included, below, for your reference in case you have not installed the earlier updates. If you have not already installed the 6.0.9.1 and earlier updates, be sure to read about them.

Scribe Insight/Integrate 6.1

New Import-Export Wizard

The Import-Export Wizard provides a simple way to package and redeploy your Scribe collaboration. Use the wizard to create packages that include your choice of any or all of the project’s integration processes, DTS files, data views, bridges, monitors, and publishers.

The Import-Export Wizard makes it easy to move your test setup to a production environment. The wizard is also an excellent method for making quick and easy collaboration backups.

The wizard walks you through choosing the collaboration elements you want to package and export. After exporting, run the wizard again to import and implement the collaboration

anywhere you want. After running the wizard, the collaboration is ready to use; there's no need to restart the computer or any services.

To open the Import-Export Wizard, from the **Scribe Console** menu, click **Import-Export Wizard**. Simple instructions on each page of the wizard guide you through importing and exporting.

Julian date conversion

Added functions for converting date formats.

JulianDate2DateTime — Returns the Gregorian/common datetime for the supplied Julian datetime.

DateTime2JulianDate — Returns the Julian datetime for the supplied Gregorian/common datetime.

JulianDateJDE2Date — Returns the Gregorian/common date for the supplied JD Edwards-formatted Julian date.

Date2JulianDateJDE — Returns the JD Edwards-formatted Julian date for the supplied Gregorian/common date.

DayOfYear — Returns the day of year for the supplied date.

XMLXPath

Added the XMLXPath function to return the value referenced by the parameter XPath.

Use the XMLXPath function to search source XML from a message or file. Returns the first value it finds matching the XPath command.

```
XMLXPath ("S", "//AddressInfo[@type = 'bill']/Custom" )
```

This example, where “S” denotes the source database, retrieves the value of the custom element under the node where type = “bill.”

Fixed ChangeScribeServer.SQL script

The **ChangeScribeServer.SQL** script has been fixed so that problems with user counting no longer occur after running the script.

This fix corrects “Invalid adapter usage code” errors.

Fixed issue when testing connection posting XML file to HTTPS

Resolved an issue causing users to receive, “Object Variable or With block Variable not set” message when trying to send a test message to an HTTP or HTTPS site using the XML component.

Fixed issue with XSD support

Resolved issues with the XML component’s XSD support. “simpleContent” nodes that included additional attributes are now correctly parsed.

Previous versions

This 6.1 update is cumulative and contains all the changes for version 6.0.3 through version 6.1. The earlier release notes are included, below, for your reference in case you have not installed the earlier updates. If you have not installed the 6.0.9.1 and earlier updates, be sure to read about them.

Scribe Insight/Integrate 6.0.9.1

Added a “grace period” if an adapter’s licensed user count is exceeded.

Rather than immediately locking all operations when the license count is exceeded, there is now a grace period during which the System Admin recipient group is sent notices that an adapter exceeds its licensed user count.

This grace period is intended to provide time during which the system administrator can reduce the number of users or increase the number of users licensed to use the adapter.

Be sure you have a valid operator in the System Admin recipient group to ensure notification.

Added support for XSD schemas to the XML component

The XML component can now read and generate XML documents based on XSD schemas as well as XDR schemas and sample XML documents.

“Umbrella” schemas are *not* supported. Only schemas that fully describe all types used in the document can be used.

Improved message processor performance

In certain situations, message processor performance can be as much as 2 to 3 times faster.

Previous versions

This 6.0.9.1 update is cumulative and contains all the changes for version 6.0.3 through version 6.0.9.1. We have included the earlier release notes intact for your reference in case you have not installed the earlier updates. If you have not installed the 6.0.9 and earlier updates, be sure to read about them, particularly the notes labeled **Important!**, as these contain instructions on steps you may need to take after the update.

Scribe Insight/Integrate 6.0.9

This update addresses the defects and enhancements described below. Any Scribe Insight/Integrate version 6.0.2 through 6.0.8 must be installed prior to installing the update. This update is cumulative consisting of changes for version 6.0.3 through version 6.0.9.

Update Installation

To install the 6.0.9 update

1. Open Scribe Console and pause all bridges, publishers, and collaborations. The easiest way to do this is to select the Integration Server node, right-click, and click **Pause all Integration Components** from the popup menu.
2. Wait for running and pending processes to complete. To see running processes, click the Integration Server node and observe them from the Running Processes view.
3. Close the Scribe Workbench and Scribe Console. Stop all Scribe services.
4. Install or download the update from the Update Service. Close the Scribe Update Manager after the InstallShield installation begins.
5. **Important.** Close all Scribe programs (including Scribe Update Manager) and stop all Scribe services for the update to complete successfully. You should only have InstallShield running when installing the Scribe updates.

6. When the installation is complete, start Scribe services and resume the bridges, publishers, and collaborations that you paused.
7. Read about the updates in 6.0.9, particularly the notes labeled **Important**, as these contain instructions on steps you may need to take after the update.

Web Server components installation

If you use the feature that provides remote access to the Scribe server via a Web service connection, you will need to install a new version of the Scribe Web server components as part of the 6.0.9 update. The installation file called **WebServer609.exe**. This file is downloaded to the Scribe program folder on your Scribe server as part of the 6.0.9 update. This installation file needs to be run on the Web server that hosts the Scribe WSDL. If your Web server is on a different computer than your Scribe server, copy the installation file to the Web server and run the installation file there.

Changes in version 6.0.9.1

Added a “grace period” if an adapter’s licensed user count is exceeded

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Changes in version 6.0.9

Daylight Savings Time Update

- ▶ This update addresses the change to Daylight Savings Time. The US Energy Policy Act of 2005 extended Daylight Saving Time (DST) in the US by approximately four weeks. As a result, beginning in 2007, DST will start three weeks earlier on March 11, 2007 at 2:00 AM, and end one week later on November 4, 2007 at 2:00 AM. There is a remote possibility that you may be required to update your Scribe software in order to maintain the proper operation of your integration.

There will be no impact for the majority of Scribe's customers. This update is required only if you use the CONVERTDATETIME function in an integration between servers in different time zones where at least one of the two servers is in the United States. If you do not meet these conditions you do not need to install this update.

Workbench

- ▶ A new function called ISPICKLISTVALUE was added. This function allows you to determine whether a value is a valid choice on a picklist. It returns TRUE or FALSE and includes an optional argument that supports parent values in dependent picklists.
- ▶ The target adapter settings for the XML adapter were changed to let users enter a comment to be output at the beginning of the XML message.
- ▶ Updated the CONVERTDATETIME function to accommodate the new start and end dates on United States Daylight Savings Time.

- ▶ Fixed the problem where the setting for “Commit specified number of source rows together” was not being saved properly.

Console

- ▶ When integration processes and monitors encounter a fatal error they can now go into recovery mode instead of going directly to a failed state. When bridges and publishers encounter an error they can now go into recovery mode instead of always retrying indefinitely. A new tab, Auto Recovery, was added to Site Settings in the Console where you configure the default recovery settings for the server. The settings in the activation step for individual integration processes, monitors, bridges and publishers allow you to disable recovery, attempt recovery on the individual component’s schedule, or use the server’s default recovery settings schedule.

Important. When the 6.0.9 update is applied, Auto Recovery in Site Settings is set to “No auto recovery.” Integration Processes and Monitors are set to “Use system settings.” Email Bridges and Query Publishers are set to “On schedule.” This is to ensure that the update does not change the behavior of the existing processes. To enable auto recovery for the integration processes and monitors, you simply need to enable it in Site Settings after the update. Scribe recommends configuring Auto Recovery in Site Settings to “Attempt auto recovery for 12 hours.” You may choose to edit the auto recovery settings on your individual integration processes and monitors to meet your requirements. To change your bridges and query publishers from trying auto recovery indefinitely, you may edit their auto recovery settings and set them the “Use system settings” or “No auto recovery.”

- ▶ Beginning with version 6.0.9 the system monitors and system data views, which are installed with the Insight server, are configured to use the WITH (NOLOCK) parameter in their query definitions.

Important. If you are upgrading to 6.0.9 from an earlier version, you should consider adding the WITH (NOLOCK) parameter to your system monitors and system data views as the upgrade does not modify them. The WITH (NOLOCK) parameter should be placed in the FROM clause after the

table name and before the WHERE clause. For example:
`SELECT * FROM SCRIBE.EXECUTIONLOG WITH
(NOLOCK) WHERE (STARTTIMEGMT >
:LastRunDateTimeGMT).`

- ▶ The queue browser and the running processes view were changed to count messages faster.
- ▶ Monitors connected to Scribe’s internal database would produce an error of “Engine property must be set” when they were run after being edited. This has been fixed.
- ▶ Error reporting for integration processes has been improved to fix several situations where errors would occur with an integration process and no alert would be created.
- ▶ Fixed the problems with queue monitor properties being saved incorrectly and with the configuration controls editing the wrong properties.
- ▶ When a monitor is configured to attach the results of its query as XML, it will now limit the XML file to 10,000 rows of data from the monitor’s query.
- ▶ In new installations the Site Settings option to “Copy system Alerts to the Event Log” defaults to being checked.
- ▶ Purging messages from the queue browser will now purge all messages instead of purging the first 100 messages.
- ▶ The Windows process ID (“PID”) for Scribe message processors was added to the running processes view.

Other

- ▶ The Scribe services were enhanced to make them more aware of errors that could happen in the services or be caused by problems in the server environment where the services are installed. When the services encounter an error, such as losing their connection to the Scribe internal database, they will now be stopped with a failed state and will put an event in the Windows application or system logs as appropriate. In the Windows Services applet, the services can be configured to restart on failure. Configured this way, the services will restart upon failure, which will correct many errors that could be encountered.

Important. After the update is applied, go into the Windows Services applet on the Recovery tab and configure the

services to the “Restart the Service” setting to meet your requirements. The default is to have the services restart after the first two failures with a 10-minute wait time and to take no action after the third failure. The fail count is configured to reset after one day.

- ▶ If the Notification Monitor encounters an error, such as losing its connection to the SMTP server, it will now retry on its configured schedule.
- ▶ Several memory leaks were fixed that could affect all the services.

There are several changes to the way that message processing problems are handled,

- ▶ Messages that cannot be parsed will now go directly to the dead message queue instead of the retry queue.

Messages that have no matching integration process will now go directly to the dead message queue instead of the retry queue.

Messages that result in a “DTS file cannot be opened” error will now go to the retry queue instead of the dead message queue.

Messages with other types of errors that could be self correcting will go to the retry queue.

- ▶ Message processors monitor the amount of memory they use and shut down if after processing DTS files their memory use grows beyond 300MB. This shut down will generate an alert in Scribe’s alert log and the Windows application log.

Important. This new feature obviates the need for the registry setting change that makes message processors shut down immediately after they run a DTS file. If you had made this registry change, you will want to set it back to the default value to realize the benefit of the message processor staying in memory for 5 minutes to wait for the next DTS file to run. The setting is called ShutdownInterval and is located in
 HKey_Local_Machine\Software\Scribe\MessageProcessor\
 Settings.

Changes in version 6.0.8

Workbench

- ▶ Version 6.0.8 includes the new Adapter for ACT! versions 2005 and 2006. This adapter can be used as a source connection to an ACT! 2005 or ACT! 2006 database.
- ▶ Several defects were fixed in the Workbench, among them:
 - The Workbench would sometimes crash when performing a lookup on a uniqueidentifier.
 - The UpdateSource configuration dialog box would open and allow selection of, non-editable fields. Non-editable fields are no longer listed as being available for update.
 - In the QueryBuilder, data objects could be either a child or a parent, but not both, even if they were so defined in the schema. They can now be used as either or both, as appropriate.
- ▶ Several defects were fixed in the XML Adapter, among them,
 - Repeating groups were not cleared when changing from one DTS to the next.
 - SMTP output was failing with an authentication error when run from the MessageProcessor.
 - An HTTP post sometimes posted only the XML header.
 - An email message would not consistently be sent at the completion of job execution.
 - Extra copies of the connection properties would sometimes be saved to the DTS, resulting in excessively large files or a failure to save. After installing the 6.0.8 upgrade, opening and saving these files will correct the problem.
 - Passwords were not encrypted when stored in the DTS.

Console

- The execution log view could not be properly filtered by date/time. This has been fixed.
- Once an enabled range has been set for monitors, clearing the enabled range had no effect. This has been fixed.
- The POP3 Test button always returned an error. This has been fixed.

“Copy to clipboard” has been added for picklists on target fields.

Other

Several minor changes have been made to improve the performance of the EventManager and MessageServer (for example, memory usage, memory leaks, stuck messages, alert/error reporting, and so on).

Update Source was not working when using the query publisher with table-based queries. This has been fixed.

Changes in version 6.0.7

Workbench

The target name in the transaction error log could sometimes cause an error due to unhandled data truncation. Target names are now truncated if necessary.

“Copy to clipboard” has been added for picklists on target fields.

The “Not In” lookup operator has been added.

A new function SETNAMEDVALUEIF has been added. The file KSVBFuncs.dll will be replaced during the 6.0.6 installation. Additionally, the source file (F1Functions.cls) that is distributed with samples has changed, as has the “Add-in Functions.doc” file that accompanies the samples. If you have made changes to the functions or have created your own functions, you will need to make the changes again after installing version 6.0.6. You do not need to add your own functions to the internal database as described in Step 3 of “Add-In Functions.doc”, provided you choose to preserve existing data when prompted during the 6.0.6 installation process.

Console

An error could occur when setting filters on queries on sources other than INTERNAL. This has been fixed.

Other

- ▶ An error could occur when creating a sample file from a query publisher. The error was caused by the presence of SQL Server small binary fields in the query. These fields are now properly handled.

- ▶ The ScribeInternal database could not be created on some SQL Server 2005 installations. The SCRIBE user and schema are now explicitly added to the SCRIBEINTERNAL and SCRIBESAMPLE databases upon creation.
- ▶ Adapter for ACT! did not fetch the proper ScheduledWith value for the Activity object. The field now contains the contact id that is retrieved from the relations table.

Changes in version 6.0.6

Workbench

- ▶ When using a query filter with ACT! or GoldMine adapters as the source in a DTS, the filter definition could be inadvertently cleared when the Source or Target Connect option was selected after a DTS had been opened. This has been fixed.

Console

- ▶ Console only installs were previously missing the required component COMDLG32.OCX. This file has been added to the update.
- ▶ When you right-clicked on an execution log entry and chose Save Message, you would get “Object variable or with block variable not set.” This has been fixed.
- ▶ The Console can now be run on systems that have Microsoft .NET 2.0 framework installed. Version 6.0.5 upgrades required a few manual steps to configure this to work correctly. Version 6.0.6 upgrades now handle all configuration automatically.

Other

- ▶ Setup/creation of the Scribe internal database failed when performed against SQL Server 2005 from a “remote” computer that did not have the SQL Server 2005 client tools installed. This has been fixed.
- ▶ The default password for the Internal and Sample databases is now “integr8!” This is to better support the strong password requirements that are enforced, by default, on SQL Server 2005. Passwords on existing systems will not be changed automatically, but can be changed manually by the

database administrator, if desired, using the InternalDb.exe “Change Password” feature.

- ▶ MetadataConfig.exe and RnScript.exe could not be run if the Scribe Internal database password has been changed from the default “SCRIBE.” This has been fixed.
- ▶ All Scribe programs now support systems with Microsoft .NET 2.0 Framework installed over the top of .NET 1.1. Before 6.0.5 only the Workbench supported such installations. However, a manual process is required to enable the Scribe Console to operate correctly if a full 6.0.5 installation is *not* performed (see *Console*, above). Scribe programs still require Microsoft .NET 1.1 framework.
- ▶ When using Skip Step If Repeated (break group) with step control functions (like GOTOSTEP, etc.), sometimes the next step number was calculated incorrectly, resulting in an invalid next step number. This invalid next step number caused following steps to erroneously skipped “due to a previous error.” This has been fixed.
- ▶ The GoldMine adapter has been enhanced to expose more fields and record IDs to facilitate manual record linkage. Additionally, the adapter metadata has been improved to better support the various GoldMine versions and databases (dBase and SQL Server).

Changes in version 6.0.5

Workbench

- ▶ When starting the Workbench, a delay of 4 or 5 seconds between the “initializing internal database” message and the splash screen may occur. This has been fixed.

Console

- ▶ Console views, monitors and query publishers were ignoring the option “Ignore Scribe Metadata Tables in Source,” and therefore would give the error, “The format of an internal table (KSYNC) is not valid” if Scribe metadata tables existed. This error would always occur when connecting to the Scribe internal database as a user other than “SCRIBE.” This has been fixed.

Other

- ▶ Steps that are set to skip if repeated should always follow the same path/outcome as the first row in the repeating block. Sometimes the success 0 path was followed instead for the first block of repeating data. This has been fixed.
- ▶ Steps that were set to skip if repeated would sometimes follow the incorrect path/outcome if the first row in the repeating block was controlled by a GOTOSTEP(n) formula. This has been fixed.
- ▶ “The page cannot be displayed” error was shown when trying to open Help from the table of contents. This has been fixed.

Changes in version 6.0.3

Other

- ▶ When using Update Source combined with Skip Step If Repeated (break group), sometimes the source record would be incorrectly updated as processed. This occurred if the header record failed and if all of the steps of one of the detail rows were skipped (not failed). This issue has been fixed and the detail rows now inherit the error from the header, so all of the header and detail rows are considered failed. This change also results in all header and detail rows being output to the rejected row table (if rejected rows is enabled).
- ▶ ThisRunDateTime and ThisRunDateTimeUTC bind variables were not being set properly for Query Integration Processes. This caused the process to not find data and not execute when it should. This has been fixed.

Upgrading to Scribe Insight/Integrate 6.0

Follow these upgrade steps to ensure that you do not lose data or disable any existing data translation specification files.

Custom Functions

New functions have been added in the last few versions. The file KSVBFuncs.dll is replaced during the installation. If you have made changes to the functions, or have created your own functions, you will need to make the changes again after installing. Refer to Add-In Functions.doc for more information.

Upgrading from Scribe Migrate 4.x or 5.0.x

1. Uninstall any Scribe adapters that appear in Add/Remove Programs.
2. Uninstall Scribe Migrate.
3. Restart the computer after uninstalling the previous version.
4. Install Scribe Insight/Integrate.
5. When the Setup program has finished installing the program files, the Scribe Database Setup program is launched. Follow the on-screen instructions to update your Scribe internal database to version 5.
6. Add users to the Scribe Console Users group as described in GettingStarted.pdf. Restart the computer after adding users to the group.
7. After installing the software, updating the Scribe internal database, and adding users to the Scribe Console Users group, start Scribe Workbench to complete the registration process. Follow the on-screen instructions to register the product through the Internet or by telephone. After entering your unlock codes, Scribe Workbench and Scribe Console will be fully functional.
8. Refer to the Key Cross Reference and Seek and Delete steps sections of this document for information about any other upgrade steps you may need to perform on your DTS files.

Upgrading from Scribe Integrate 4.x or Insight/Integrate 5.x

1. Pause all integration processes and monitors.
2. Close all Scribe applications.
3. Stop all Scribe services.
4. Uninstall any Scribe adapters listed in Add or Remove Programs.
5. You can uninstall Scribe Insight/Integrate if desired, but this step is not necessary. If you uninstall, restart the computer after uninstalling the previous version.
6. Install Scribe Insight/Integrate 6.0.
7. When the Setup program is done installing the program files, launch the Scribe Database Setup program. Follow the on-

screen instructions to update your Scribe internal database. This step may not be necessary depending on which version you are upgrading from. Also note that this upgrade may execute a script against the Scribe internal database, which may take a few minutes to run depending on how much data you have in that database. The installation may appear to stop responding if you do not see any activity (hourglass appears for a few minutes). Do *not* restart the computer while the upgrade is taking place. Contact Scribe technical support if you need assistance with installing the upgrade.

8. A message may appear about adding users to the Scribe Console Users Group. You can ignore the message, unless you want to take the opportunity to add more Console users than you had in the previous version.
9. After installing the software, updating the Scribe internal database, and modifying the Scribe Console Users Group if necessary, start Scribe Workbench to complete the registration process. Follow the on-screen instructions to register the product through the Internet or by telephone. The original product serial number will be needed to re-register the product. Serial numbers are located in Help's **About** dialog box, on the back of the product package, or they can be retrieved from Scribe SupportWeb (registered products area). After entering your unlock codes, the Scribe Workbench and Scribe Console will be fully functional.
10. Refer to the Key Cross Reference and Seek and Delete Steps sections of this document for information about any other upgrade steps you may need to perform on your DTS files.
11. Resume all integration processes and monitors.

— end —