



relevant ecommerce™

TECHNICAL ZNODE CONNECT FOR SCRIBE

Within this technical guide you will find information on connecting the Znode platform to your database using Scribe.

October 2015

Using Scribe

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1 Purpose of This Document

This document will discuss the following topics:

- The System Requirements for Scribe
- What is Scribe?
- How Scribe Works Installing Scribe
- Creating a Scribe Connection Creating a Scribe Solution Mapping your Fields Scheduling Your Data Sync

2 About Scribe

What's in this chapter?

- [System Requirements](#)
- [What is Scribe?](#)
- [How does it Work?](#)
- [Making eCommerce Easier](#)

2.1 System Requirements

Operating System and Software Support

- Windows XP or higher
- Current security patches and critical updates for Microsoft operating systems. Microsoft Word 2003 or higher
- Current security patches and critical updates for Microsoft Word, Microsoft Office.

Hardware Support (PC Only)

- Pentium 400MHz or higher
- 512MB RAM for XP
- 1GB or higher for Vista
- 2GB or higher Windows 7
- 150MB free hard drive space or higher

Web Browser Support*

- Internet Explorer 7.0 or higher

Connectivity

- Cable, DSL or T1 Equivalent
- Dial-up may function in an emergency but is not supported for normal operations.

At the minimum level performance may be slow or the system may run out of memory when operating the browser. Please refer to the Microsoft websites for information on optimal browser performance.

** While Scribe does not endorse specific products, it is important for full platform functioning that the Anti-Virus software installed allows the user or network administrator to adjust script blocker settings. If you have questions regarding your brand of Anti-Virus software, please contact the publisher of the software for more information.

2.2 What is Scribe?

Scribe Online is an cloud-based data integration platform. Scribe brings together critical business applications in the cloud, on-premise or anywhere in between. But with your Znode API, we'll be using the cloud-based version.

For businesses, Scribe Online is an easy-to-use interface for mapping data fields between platforms. It's an intuitive way of replicating, integrating, and synchronizing services through a wizard-based interface.

For partners, Scribe Online is a platform that features a multi-tenant architecture (where a single a server serves multiple clients). It has a scalable infrastructure and a collaborative work environment that's compatible with widely used CRM environments like MS Dynamics and Salesforce.

2.3 How Does It Work?

Scribe Online Synchronization Services synchronizes your CRM application data with critical business applications such as billing, ERP, sales and marketing. Updates to customer information are captured and reflected in both the CRM system and the corresponding back-end systems, ensuring the information is current and accurate across the organization.

How Does it Help You?

- Provides native access to nearly all data types in your CRM system, Web service endpoints, or SQL based endpoints.
- Offers an intuitive wizard-based interface to guide synchronization set-up.
- Enables partners to build repeatable solutions without the complexity of custom code.
- Integrates and provisions operational data in real time to support low-latency data synchronization needs. Offers flexible scheduling options to integrate operational data from real time to batch
- Matches, "de-dupes," and cleanses data before synchronizing
- Provides features such as encrypted data transfer and role based permission management to protect data security
- Enables collaboration so you can work on projects anytime/anywhere together with colleagues and partners
- Provides pre-built solutions to help get you started or to save and re-use with any project or organization

2.4 How Scribe Makes eCommerce Easier

How does Scribe make e-commerce easier for your business?

- It provides connectivity to a broad range of business applications
- It has an affordable monthly cost.
- Its intuitive interface gives you a "no-coding-required" experience.
- You'll get regular upgrades, real-time monitoring, and real-time scheduling of your data's synchronization.

3 How to Install Scribe

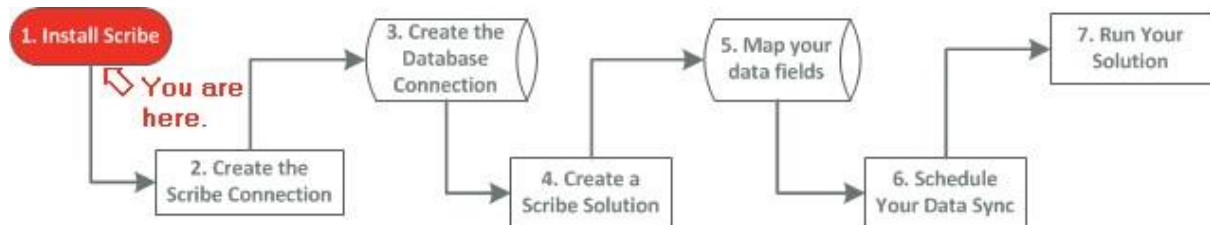
What's in this chapter?

- [Installing Scribe](#)

3.1 Installing Scribe

Where are you?

To set up Scribe, you must do these steps in order. Here's an overview of how the process works.



Installing Scribe

Installing Scribe is the first step in creating your Scribe solution.

1. Go to <https://online.Scribesoft.com> and create a new account (if you haven't done so already). This process works best with Microsoft Internet Explorer.
2. Once you've created a new account, go ahead and log in.

Sign In

Email

ex: name@example.com

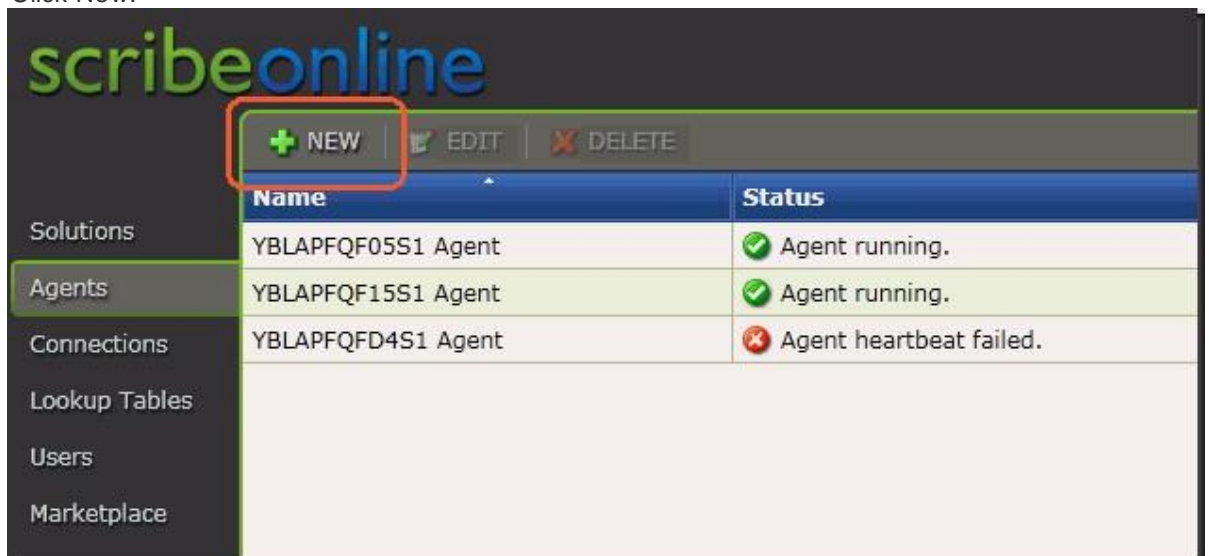
Password

[Create a new account](#) | [Forgot your password?](#)

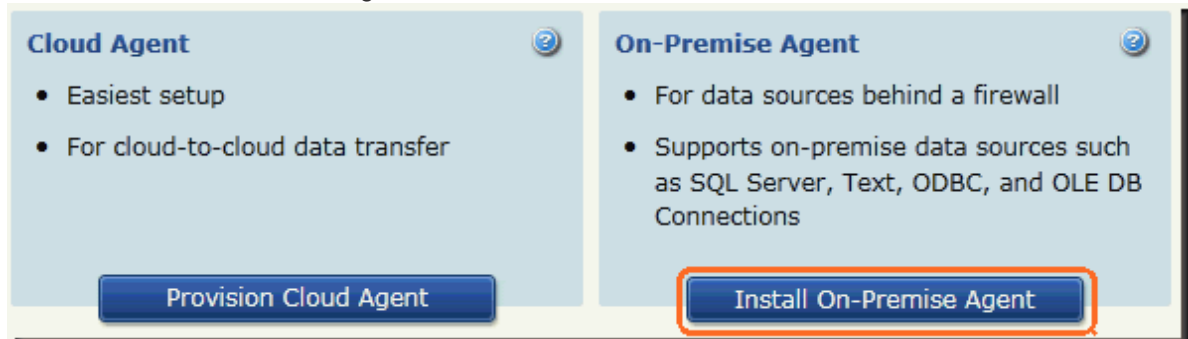
3. Click Agents.



4. Click New.



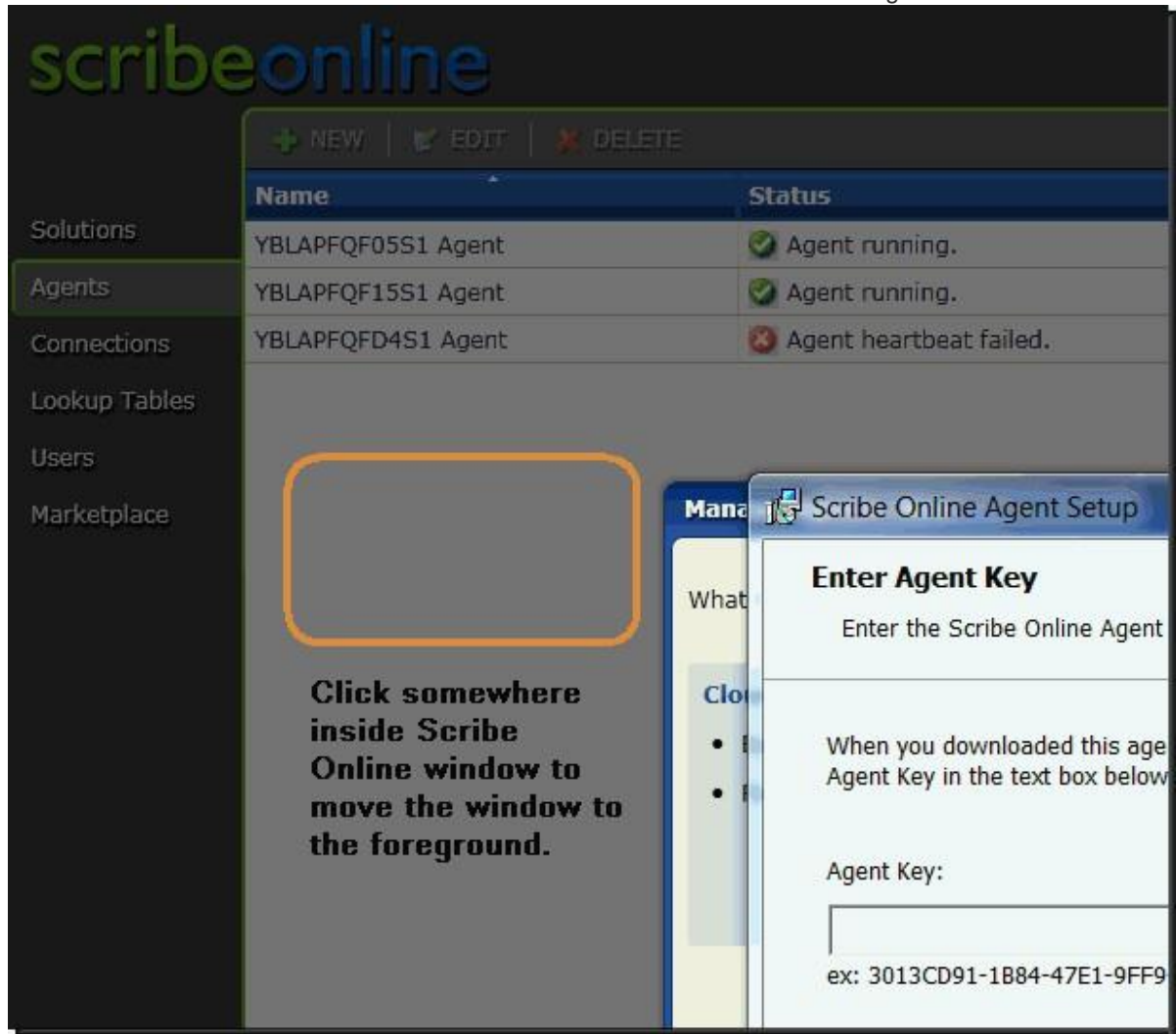
5. Select Install On-Premise Agent.



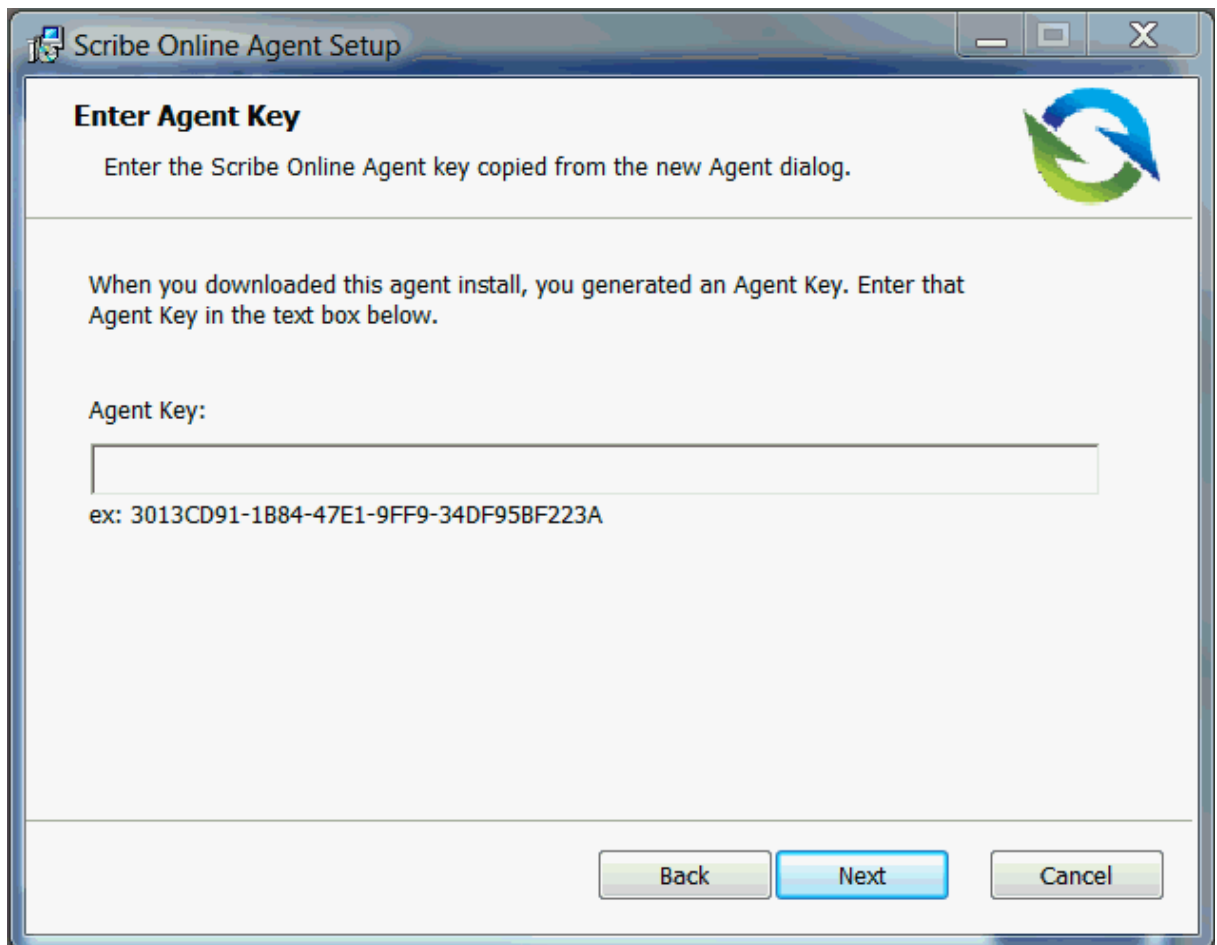
The File Download Window opens.

6. Click Save. The Save As window opens.
7. Select the desired location (if needed), and click Save again.
8. Click Run. The Scribe Configuration Check window opens.

9. Click somewhere inside Scribe Online window to move the window to the foreground.



10. Click Copy so your Agent Key is copied to the clipboard.
11. Click Yes to allow the application to access your clipboard.
12. Click inside the Agent key box and paste your Agent Key.



13. Click Next.

14. Click Install Agent.

4 How to Create the Scribe Connection

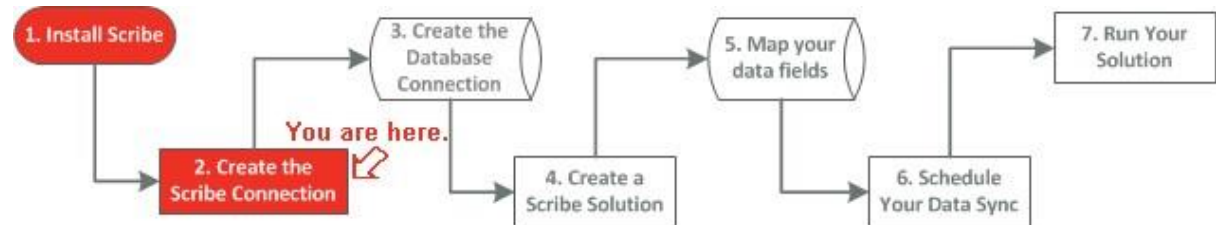
What's in this chapter?

- [Creating the Scribe Connection](#)
- [Reasons Why the Connection Might Be Unsuccessful](#)

4.1 Creating the Scribe Connection

Where are you?

To set up Scribe, you must do these steps in order. Here's an overview of how the process works.



Creating the Scribe Connection

1. Click Connections.

scribeonline

+ NEW | EDIT | DELETE

Name	Status
YBLAPFQF05S1 Agent	✗ Agent shut down. Please manually restart the service.
YBLAPFQF05S1 Agent 2	✓ Agent running.
YBLAPFQF15S1 Agent	✓ Agent running.
YBLAPFQFD4S1 Agent	✗ Agent heartbeat failed.

Solutions
Agents
Connections
Lookup Tables
Users
Marketplace

2. Click New.



3. Select Znode Sys Connector and click OK.

Manage Connections: New

Type Microsoft Dynamics CRM

Connection name Microsoft Dynamics CRM

Deployment Microsoft SQL Server

CRM Online URL MySQL Server

Windows Live ID ODBC

Password OLE DB

Organization Oracle Database

☒ Include picklist display names

The Dynamics CRM user must have read and bulk delete privileges as well as appropriate permissions to create entities and register plug-ins.

You must test the Connection before saving any changes. Be sure to test the Connection with any Agents that use this Connection.

Agent YBLAPFQF05S1 Agent

Test Connection

OK Cancel

4. Enter the following information:
The desired Connection Name.
The Base URL, which is the URL for your Web API. The API Version.
And enter na for the API Token since it is currently not required.

Manage Connections: New

Type: ZNode SYS Connector

Connection name:

Base URL:

API Version:

API Token:

This Connector provided by ZNode, Inc. © 2012 All rights reserved

You must test the Connection before saving any changes. Be sure to test the Connection with any Agents that use this Connection.

Agent: YBLAPFQF05S1 Agent

Test Connection

OK Cancel

5. Select the Agent you just created.

Manage Connections: New

Type: ZNode SYS Connector

Connection name: My Training Connection

Base URL: http://api.znodedev3.com

API Version: v1

API Token: ..

This Connector provided by ZNode, Inc. © 2012 All rights reserved

You must test the Connection before saving any changes. Be sure to test the Connection with any Agents that use this Connection.

Agent: YBLAPFQF05S1 Agent

Test Connection

OK Cancel

YBLAPFQF05S1 Agent

YBLAPFQF05S1 Agent 2

YBLAPFQF15S1 Agent

YBLAPFQFD4S1 Agent

6. Test your connection before you click OK.

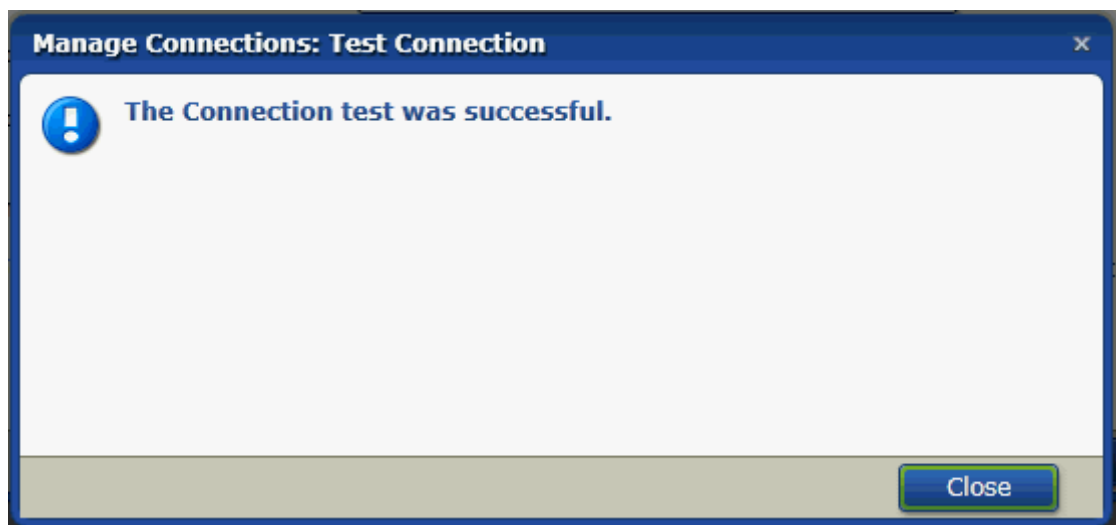


The 'Manage Connections: New' dialog box contains the following fields and controls:

- Type:** A dropdown menu with 'ZNode SYS Connector' selected.
- Connection name:** A text input field containing 'My Training Connection'.
- Base URL:** A text input field containing 'http://api.znodedev3.com'.
- API Version:** A text input field containing 'v1'.
- API Token:** A text input field containing two dots '••'.
- Agent:** A dropdown menu with 'YBLAPFQFD4S1 Agent' selected.
- Test Connection:** A button highlighted with an orange border.
- OK:** A button at the bottom right.
- Cancel:** A button at the bottom right.

Below the fields, there is a copyright notice: 'This Connector provided by ZNode, Inc. © 2012 All rights reserved' and a warning: 'You must test the Connection before saving any changes. Be sure to test the Connection with any Agents that use this Connection.'

A screen appears saying the test was successful.



WHAT IF YOUR CONNECTION WAS **NOT** SUCCESSFUL? See: Reasons why the connection might be unsuccessful.

7. Click OK when you are finished.

4.2 Reasons Why the Connection Might Be Unsuccessful

If your connection is not successful, here are some very common reasons why:

1. You might need to restart your Scribe service in the Control Panel.
2. Your firewall may prevent you from connecting.
3. Double check the information you entered into the fields for this screen.
4. Make sure your Web API is running by entering the API's URL into the browser.

5 How to Create the Database Connection

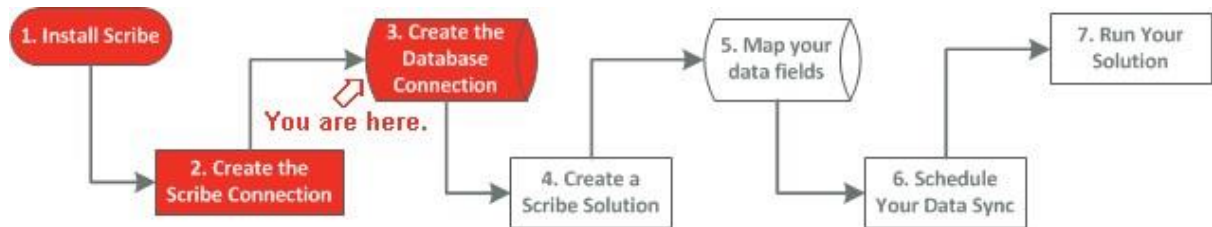
What's in this chapter?

- [Creating the Database Connection](#)

5.1 Creating the Database Connection

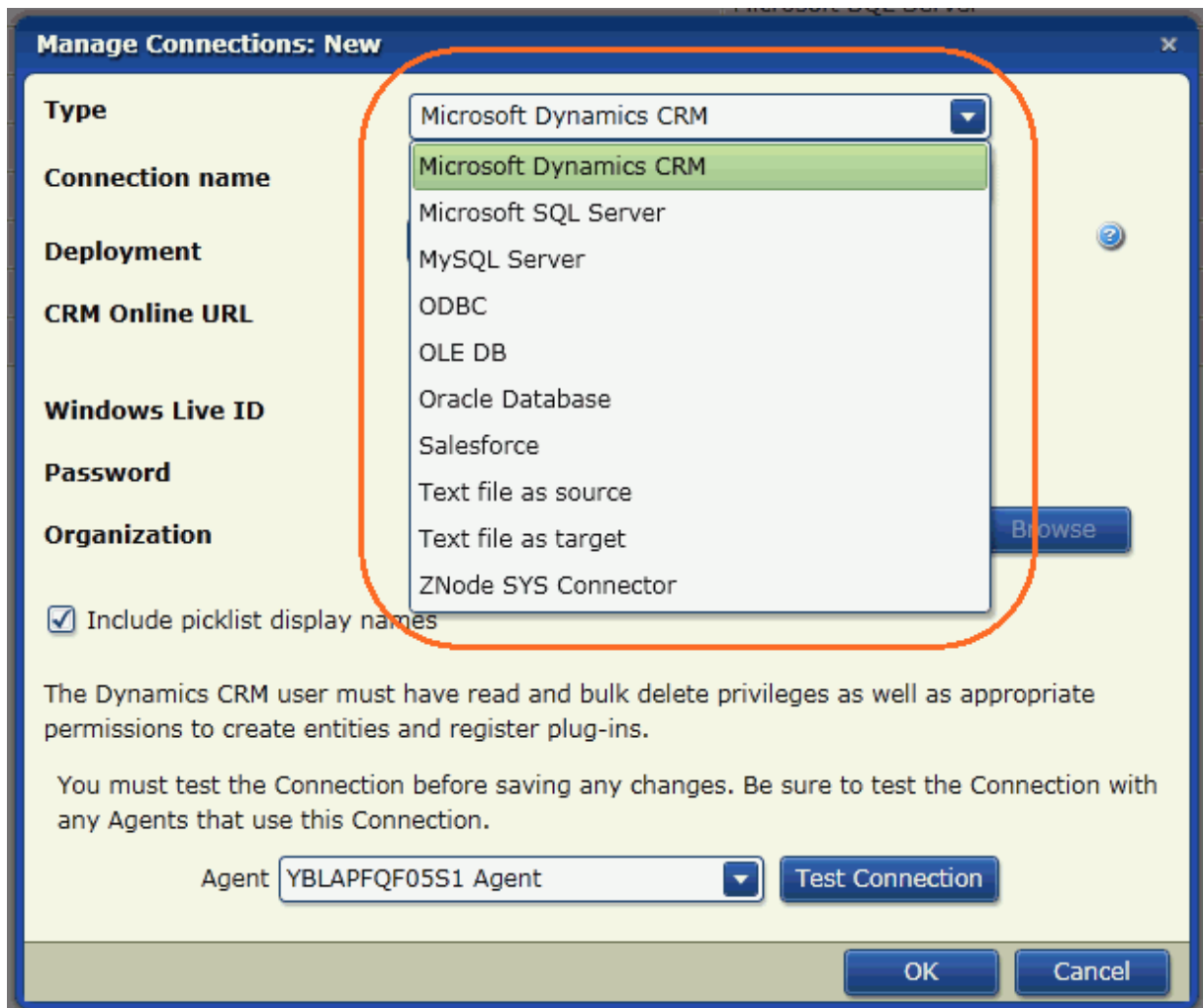
Where are you?

To set up Scribe, you must do these steps in order. Here's an overview of how the process works.



Creating the Database Connection

1. Click Connections, then click New.
The Manage Connections screen appears.
2. Select Microsoft SQL Server (or the kind of database that you are using).



3. Enter the following information:
- The desired Connection Name.
 - The Server Name.
 - The name of your database.
 - Select the desired Authentication type.
 - Your Login and Password.

Manage Connections: New

Type: Microsoft SQL Server

Connection name: MyTrainingConnectionsDB

Server name: YBLAPFQFD4S1

Database name: znode_multifront_67_0730

Authentication: SQL Server

Login: znodeuser2

Password:

The Database Administrator may need to grant Insert, Select, Update and Delete access on this database to the identified user. If this Connection will be used as a target for replication, this user must also be able to create tables and indexes.

You must test the Connection before saving any changes. Be sure to test the Connection with any Agents that use this Connection.

Agent: YBLAPFQFD4S1 Agent

Test Connection

OK Cancel

4. Test your connection.
5. Click Close.

Manage Connections: Test Connection

The Connection test was successful.

Close

6 How to Create a Scribe Solution

What's in this chapter?

- [What is a Solution?](#)
- [How Do Solutions Help](#)
- [You? Creating a Solution](#)

6.1 What is a Solution?

A Scribe solution is two databases joined together in Scribe and successfully exchanging data.

What does it do?

A Scribe solution helps you do the following:

- Access and analyze your source data with advanced reporting tools such as SQL Server Reporting Services (SSRS) or Crystal Reports.
- Quickly generate data cubes for use with business intelligence platforms such as GoodData and iAnalytics. Merge your source data with other information across your enterprise to allow you to see the entire picture. Deliver critical business intelligence to all key constituents across your business without requiring access to your source data.
- Create an archive of your customer data to meet compliance and governance requirements.

6.2 How Do Solutions Help You?

Here are just a few ways that Scribe can automate your business processes:

- Map your source and target data stores.
- Use drag-and-drop technology to create links between source and target fields.
- Create formulas to transform target fields with a rich set of functions and operators. Filter your source data.
- Use standard create, read, update, and delete operations when integrating your data.

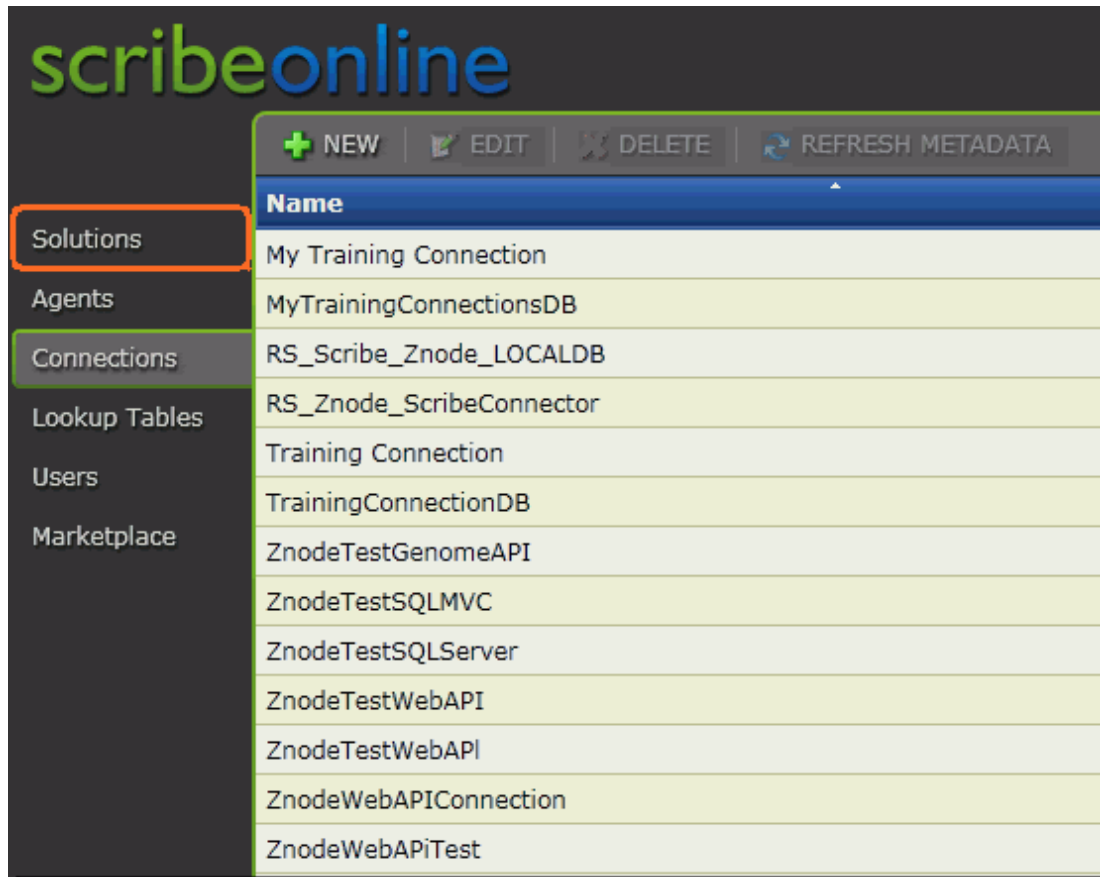
6.3 Creating the Solution

Where are you?



Creating the Solution

1. Click Solutions.



2. Click New.

Scribe Online Replication Services (RS) (Trial - Expired)

[+ NEW](#) [EDIT](#) [DELETE](#) [RUN NOW](#) [VIEW HISTORY](#)

Use RS to copy the contents of your Salesforce or Microsoft Dynamics CRM system Server database for reporting or business intelligence.

Scribe Online Synchronization Services (SYS) (NFR - 23 days remaining)

[+ NEW](#) [EDIT](#) [DELETE](#) [RUN NOW](#) [VIEW HISTORY](#)

Instance name	Description
RICCO_New_1106	TESTING
Sameer Test	
TrainingSolution	

3. Enter the desired name for your solution.

Scribe Online

☐ 1 General ☐ 2 Agent ☐ 3 Maps ☒ 4 Schedule

Name your Solution Instance. The name must be unique to this Organization.

Name

ex: Test or Production

Description

4. Click Next.

scribeonline

☒ 1 General ☐ 2 Agent ☐ 3 Maps ☒ 4 Schedule

Name your Solution Instance. The name must be unique to this Organization.

Name
ex: Test or Production

Description

To get started, you will need:

1. A computer where the Agent will run.
2. Access, with appropriate privileges, to the source and target data stores to which you want to connect.

Back Next Save

[Help Center](#) [Support](#) [System Status](#) [Scribe Corp](#)

5. Select the Agent you just created from the drop-down menu.

scribeonline

☒ 1 General ☒ 2 Agent ☐ 3 Maps ☒ 4 Schedule

Specify an Agent

An Agent is required for communication between Source and Target Connections.

Select an existing Agent or download and install a new one.

Agent YBLAPFQFD4S1 Agent

[Help Center](#) [Support](#) [System Status](#) [Scribe](#)

6. Click Next.

7 How to Map Your Fields

What's in this chapter?

- [Mapping Your Fields](#)

7.1 Mapping Your Fields

Where are you?



Mapping Your Fields

1. Click New.
2. Give your connection a name.
3. Select the Connections to your database.
4. Select the desired connection.
5. Select the desired entity.
6. Click the Fields tab and map your fields.
7. Link the desired fields by simply dragging the desired source field to the desired target field.
8. Click OK when you are finished.

IMPORTANT: Make sure both fields (the source and the target fields) are the same data type: text fields, numeric fields, etc.

8 How to Schedule Your Data Sync

What's in this chapter?

- [Scheduling Your Data Sync](#)

8.1 Scheduling Your Data Sync

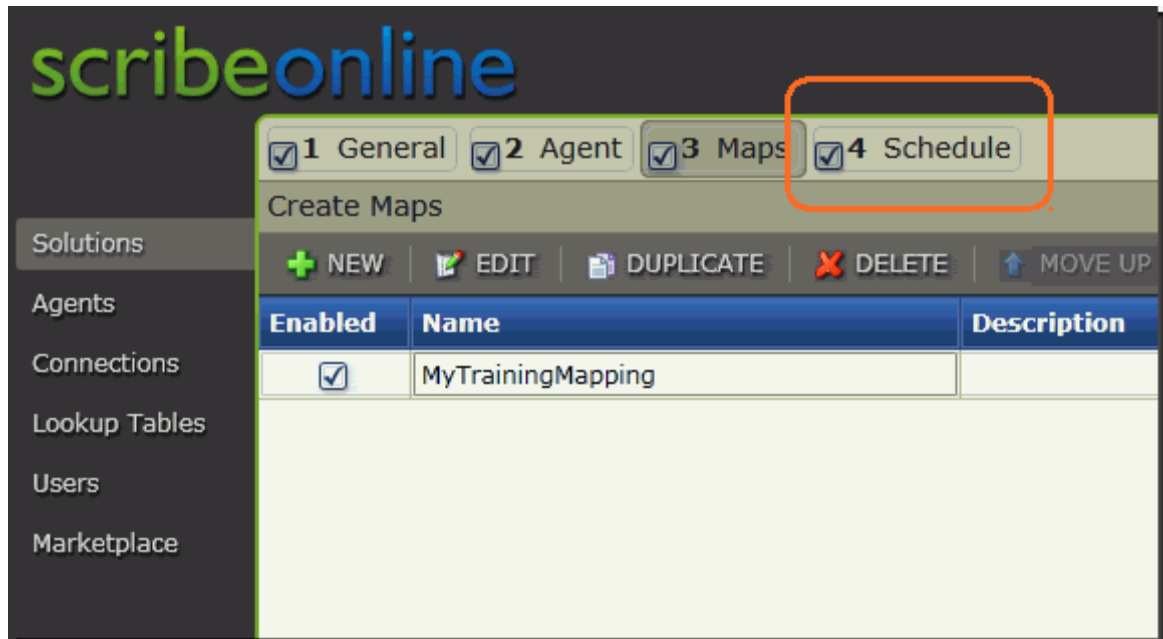
Where are you?

To set up Scribe, you must do these steps in order. Here's an overview of how the process works.



Scheduling Your Data Sync

1. Click the schedule tab.



2. Select the desired schedule type.
 - On Demand is a one-time-only data sync that you do not schedule. You would click Run Now from the Solutions page.
 - Once on is a one-time data sync that you can schedule.
 - Recurring is a data sync that occurs on a day-and-time interval that you define.

☒ 1 General ☒ 2 Agent ☒ 3 Maps ☒ 4 Schedule

Schedule Solution Instance

☒ On Demand
To run this Solution Instance, select Run Now from the Solutions page.
Time zone for schedule (GMT-05:00) Eastern Time (US & Canada)

☐ Once on 11/9/2012 12:00 AM

☐ Recurring
Days ☒ Every 1 days, starting on 11/8/2012
☐ Every week on ☐ Monday ☐ Tuesday ☐ Wednesday ☐ Thursday ☐ Friday
☐ Saturday ☐ Sunday
☐ Every month on days:

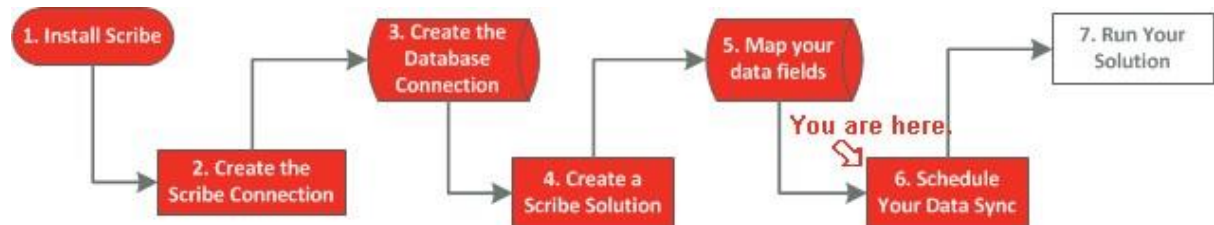
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				Last

Times ☒ At 12:00 AM
☐ Every 30 Minutes

9 Running Your Data Sync

Where are you?

To set up Scribe, you must do these steps in order. Here's an overview of how the process works.



Running Your Data Sync

If you have already scheduled your data sync, it will run based on the settings you have defined.

But if you want to manually run your data sync, you can always click Run Now from the Solutions tab. See below.

The screenshot shows the Scribe Online web interface. On the left is a dark sidebar with a menu containing 'Solutions', 'Agents', 'Connections', 'Lookup Tables', 'Users', and 'Marketplace'. The 'Solutions' item is highlighted with an orange box. The main content area has a dark header with the 'scribeonline' logo. Below the header, there are two sections: 'Scribe Online Replication Services (RS) (Trial - Expired)' and 'Scribe Online Synchronization Services (SYS) (NFR - 348 days remaining)'. Each section has a toolbar with buttons: '+ NEW', 'EDIT', 'DELETE', 'RUN NOW', and 'VIEW HISTORY'. In the 'SYS' section, the 'RUN NOW' button is highlighted with a red box. Below the toolbars is a table with two columns: 'Instance name' and 'Description'.

Instance name	Description
Sameer Test Solution	ZNode API to ZNode API tests
SO: ZNode <> Nav DB	
VMWare Scribe 1.3 Solution	Scribe Insight/NAV to ZNode API and back

