

How to configure caller recognition using:

## ODBC

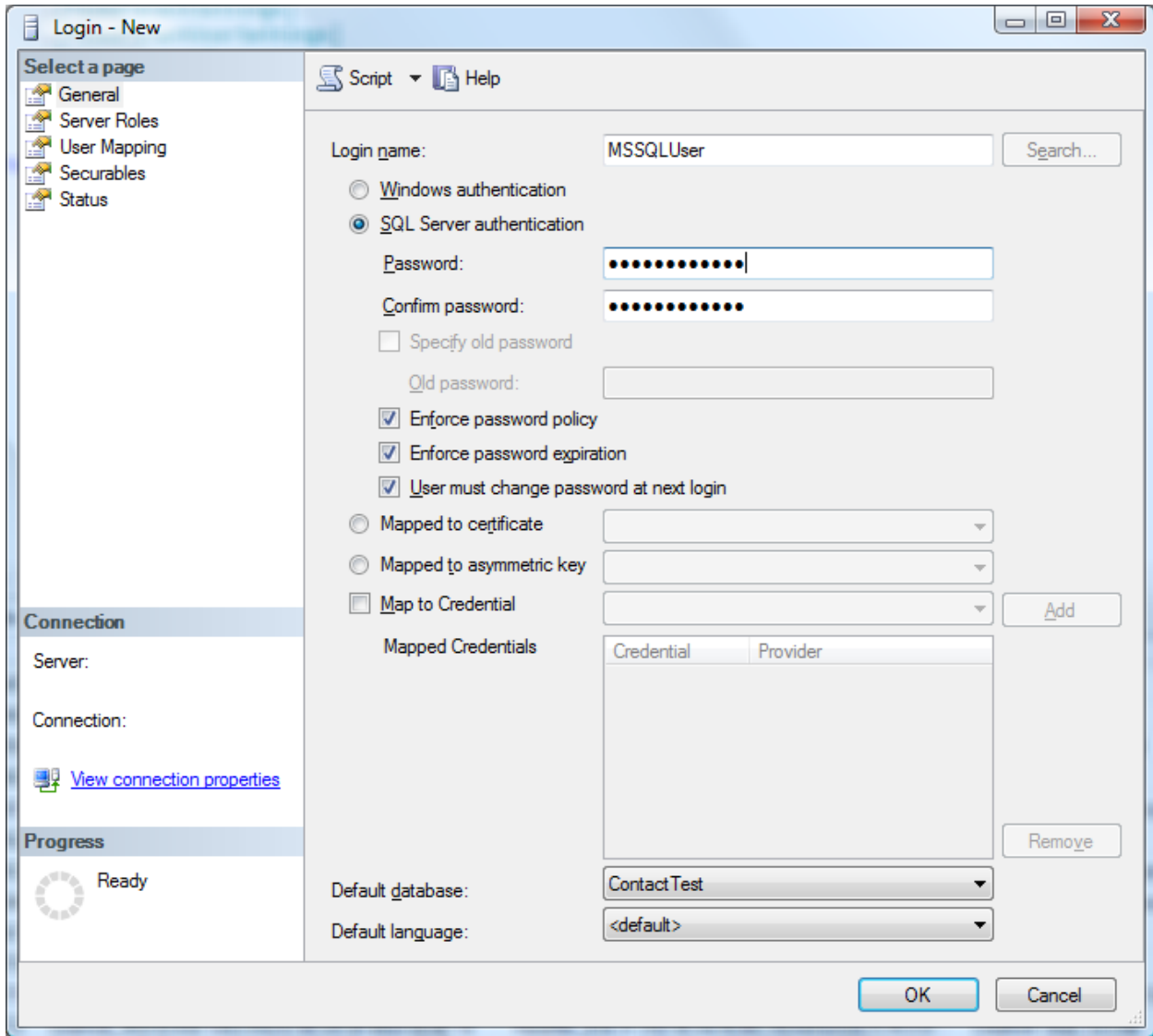
The wizard also provides a way to replicate contacts using Open Database Connectivity (ODBC). ODBC is a standard programming language middleware interface for accessing database management systems. An ODBC driver acts as a translation layer between the application and a Database Management System (DBMS). The Recognition Configuration Tool can access any DBMS for which a driver is installed and is set as System DSN, to enable the Recognition Update service to access the driver.

There are two common methods for setting up a data link via ODBC: (1) connecting to a MS SQL server or (2) any other system using a separately configured ODBC driver. This manual will describe both methods step-by-step in the following scenarios.

### Scenario 1: connecting to a Microsoft SQL Server

#### Prerequisites

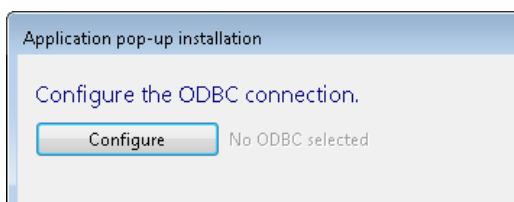
The Microsoft SQL Server must provide access to the Recognition Update Service. This is usually done via SQL Server Authentication via a specific SQL Server Login account with read access on the relevant database.



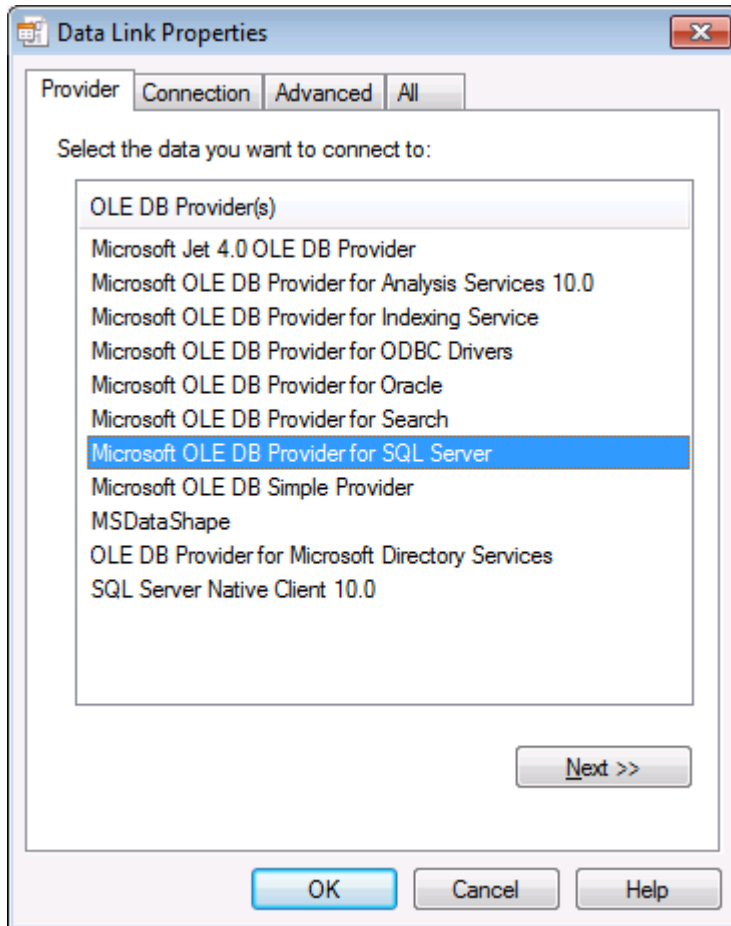
Alternatively, if you would like to use Windows authentication, please note that the Recognition Update Service by default uses the local SYSTEM account and it is this account that needs to be allowed access to the SQL Server.

### Steps

Contact info replication using ODBC is pre-configured for specific applications or you can choose “My application is not listed” in the first screen of the wizard and then choose “ODBC Connection”. This will lead to the first ODBC screen.



Click ‘Configure’ to specify your Data Link properties.



Select "Microsoft OLE DB Provider for SQL Server" and click "Next >>".

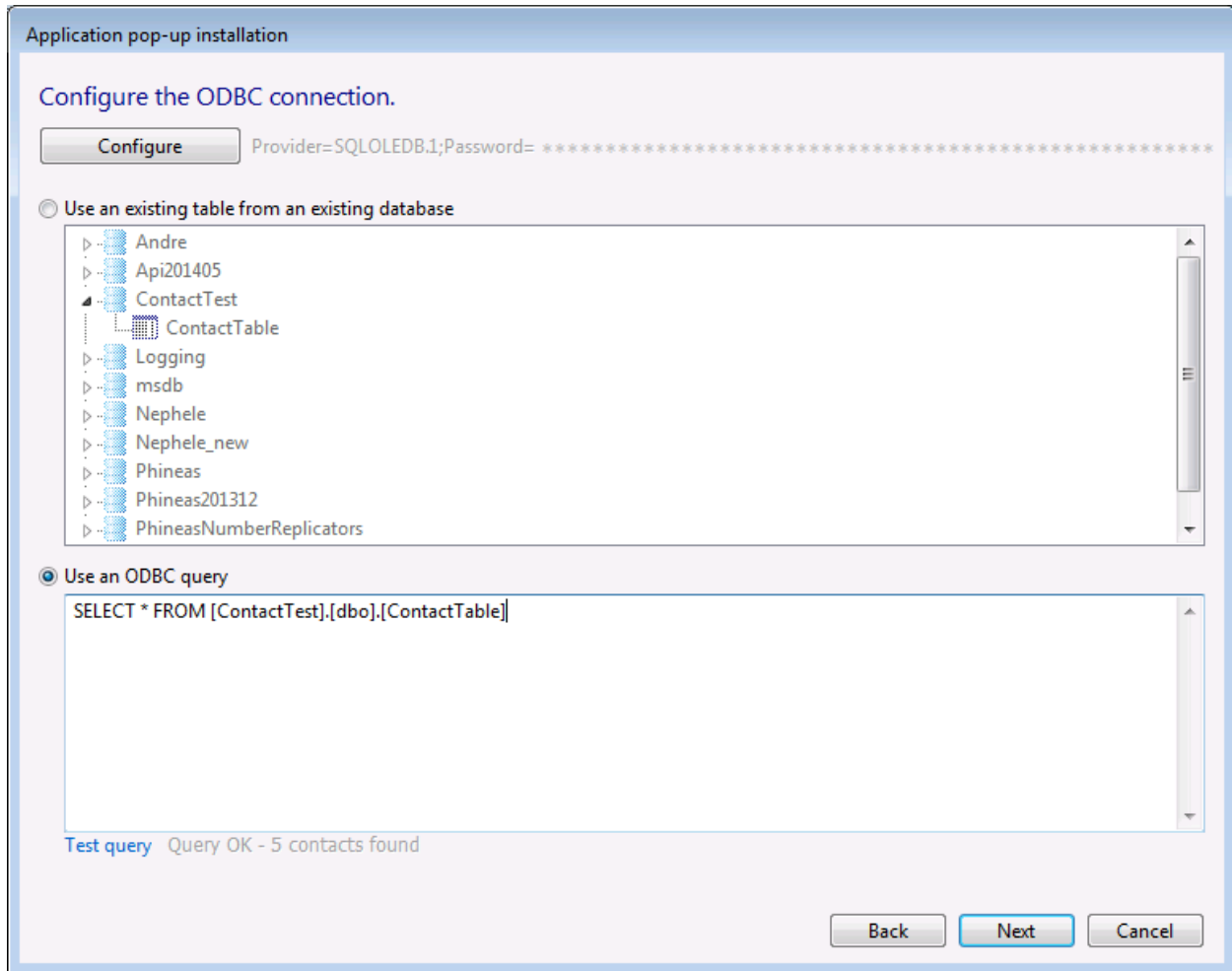
Fill in the server name and specify valid credentials.

**IMPORTANT:** the credentials need to be used by the Recognition Update Service, not the tool you are currently using. Therefore, it is the service that needs the information to log on to the SQL server. If you choose the “Use the Windows NT Integrated Security” option, then the NT user account of the Recognition Update Service should be allowed access to the SQL Server and relevant database. Usually, it is better to create a specific ‘Login’ for the Recognition Update Service with read-access to the relevant database on the SQL Server. You can then choose “Use a specific user name and password”. Please note that ‘Allow saving password’ must be checked in order for the Recognition Update Service to use the credentials.

If the connection can be made, you may choose a specific database from the server using the dropdown list. This is not required and is also possible in the next step.

Click ‘Test Connection’ to check whether all information was entered correctly. Remember however that this test will be performed by the Recognition Configuration Tool, not the Recognition Update Service. Therefore, if you chose to use integrated Windows NT security the test is performed with the wrong NT User Account.

Click “OK” to confirm the specified properties.



After the Data Link properties are set, the Recognition Update Service tests the connection and returns all available databases and tables. You can either select a specific table or create a custom ODBC query to combine data from multiple tables. On clicking “Test query” the Recognition Update Service will perform the query and return the record count upon success.

Either choice will complete the ODBC configuration process and enable the ‘Next’ button.

## Scenario 2: connecting to an OLE DB Provider for ODBC Drivers

### Prerequisites

The ODBC driver must be pre-configured to provide access for the Recognition Update Service. This is usually done via the

(32 bit systems)

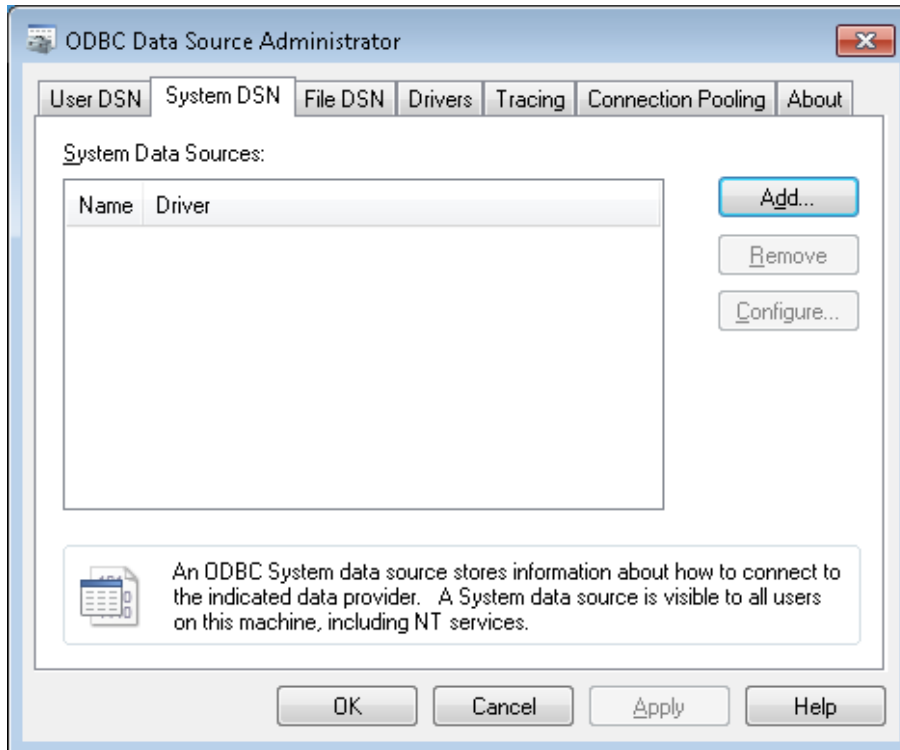
Open “c:\windows\System32\odbcad32.exe”.

(64 bit system)

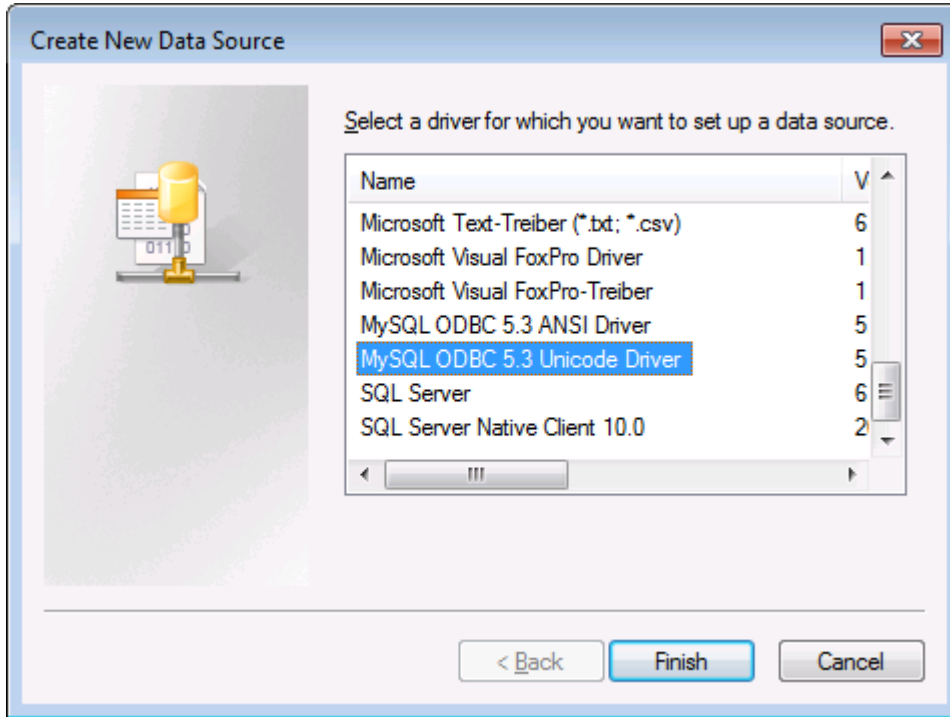
Open “c:\windows\SysWOW64\odbcad32.exe”.

NOTE: The Recognition Update Service is a 32 bit process and therefore always and only uses 32 bit ODBC drivers! On 64 bit systems, Microsoft decided to keep the same name 'ODBCAD32.EXE' for the administration application for compatibility purposes. However, this can be confusing because a 64 bit system thus has two ODBCAD32.EXE applications. A 64 bit version in the folder c:\windows\system32 (which also kept its original name) and a 32 bit version in the new folder c:\windows\syswow64. The 32 bit version should be started!

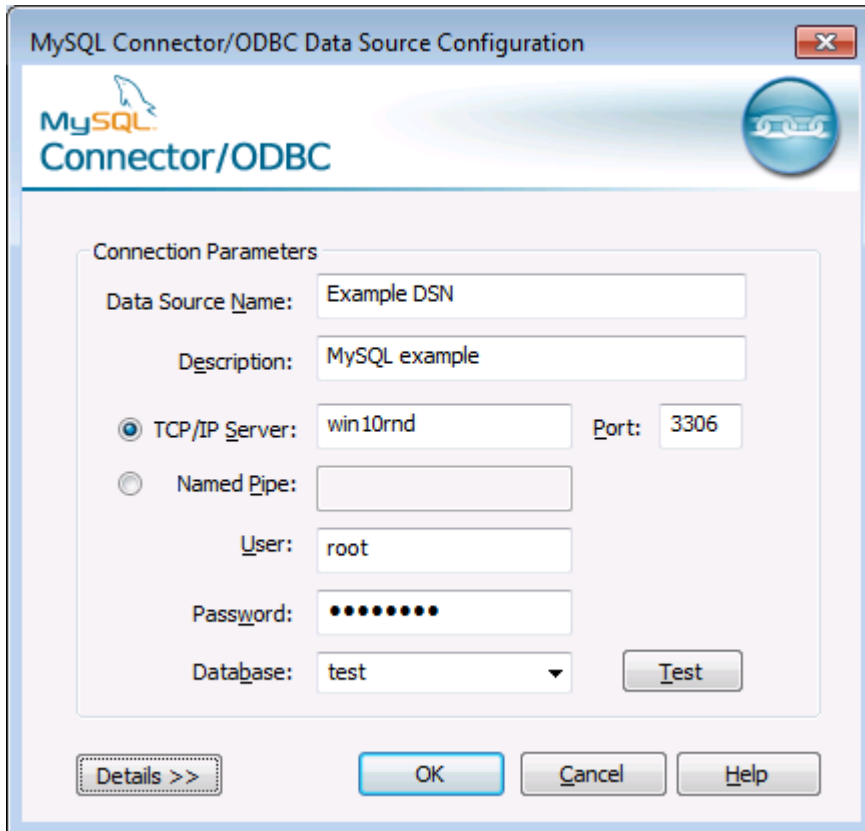
In the Data Source Administrator select the tab "System DSN" and then press "Add..." to add a new ODBC data source.



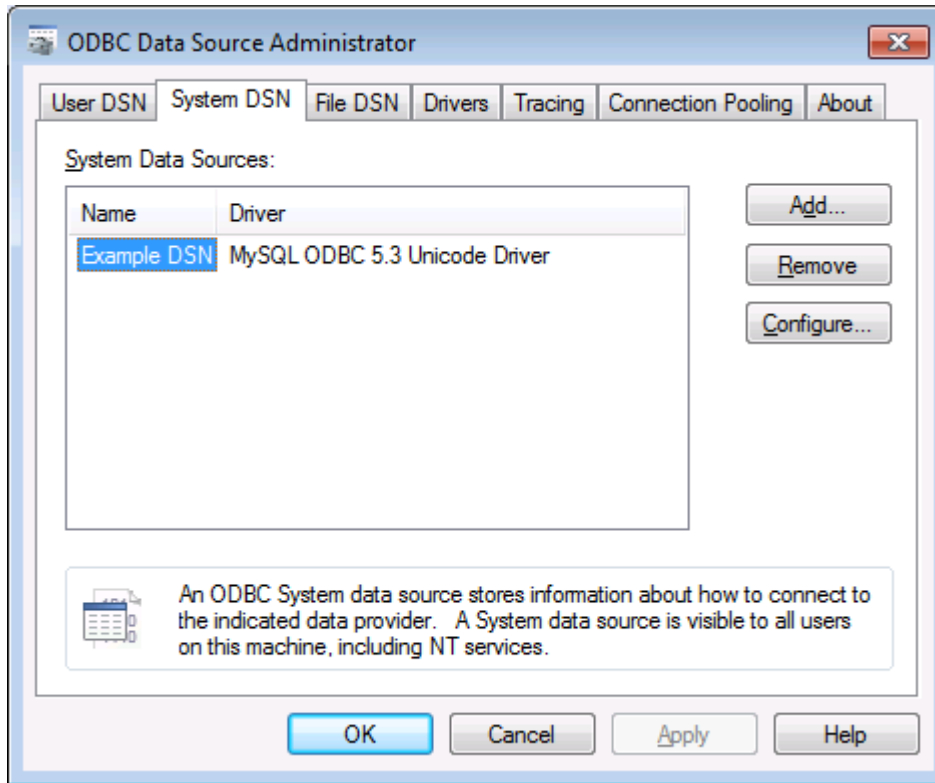
The settings for your data source differ per ODBC driver. Please consult the ODBC driver documentation. And remember to check whether indeed the 32 bit drivers were installed if your driver does not show up here.



This example will show the configuration of a MySQL ODBC connection.



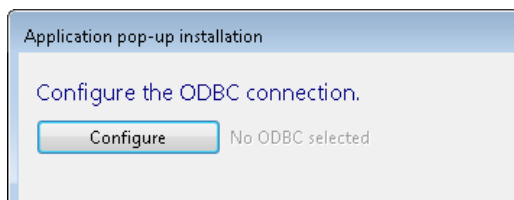
In this case all required settings (location of the database server and credentials) are configured in the System DSN.



After successfully adding the ODBC data source to the System tab, you can select the DSN in the Recognition Configuration ODBC Wizard. It is important you add the DSN to the system tab and not to the user tab. Both may show up in the Recognition Configuration ODBC Wizard, however, because the Recognition Update Service is started using the Local System account (thus independent from a particular user) it does not have access to the user DSN's.

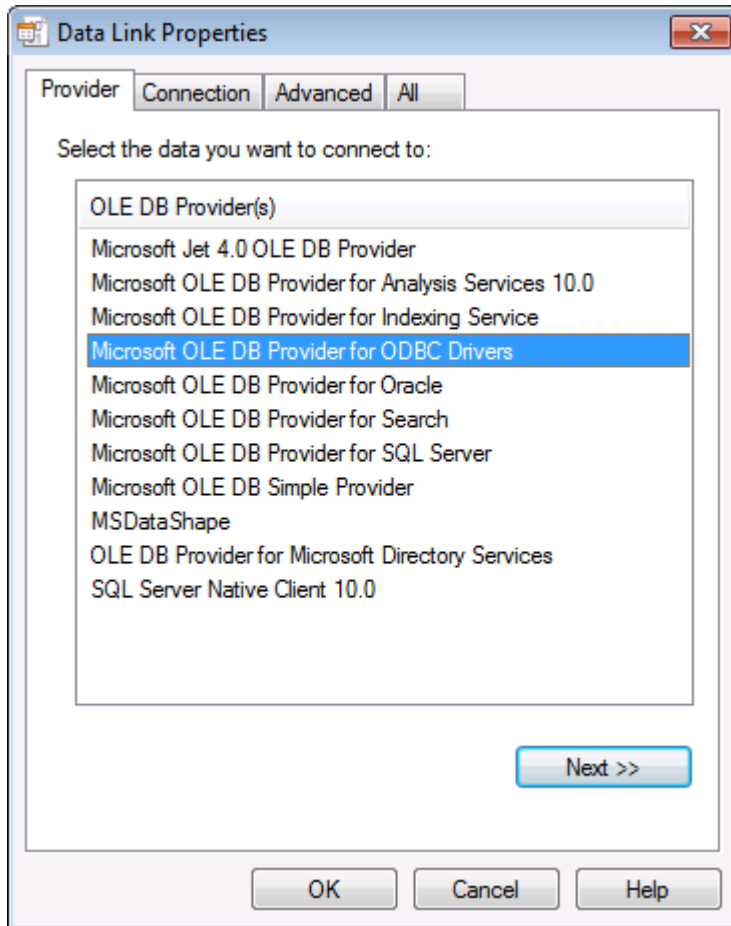
### Steps

Contact info replication using ODBC is pre-configured for specific applications or you can choose "My application is not listed" in the first screen of the wizard and then choose "ODBC Connection". This will bring you the first ODBC screen.

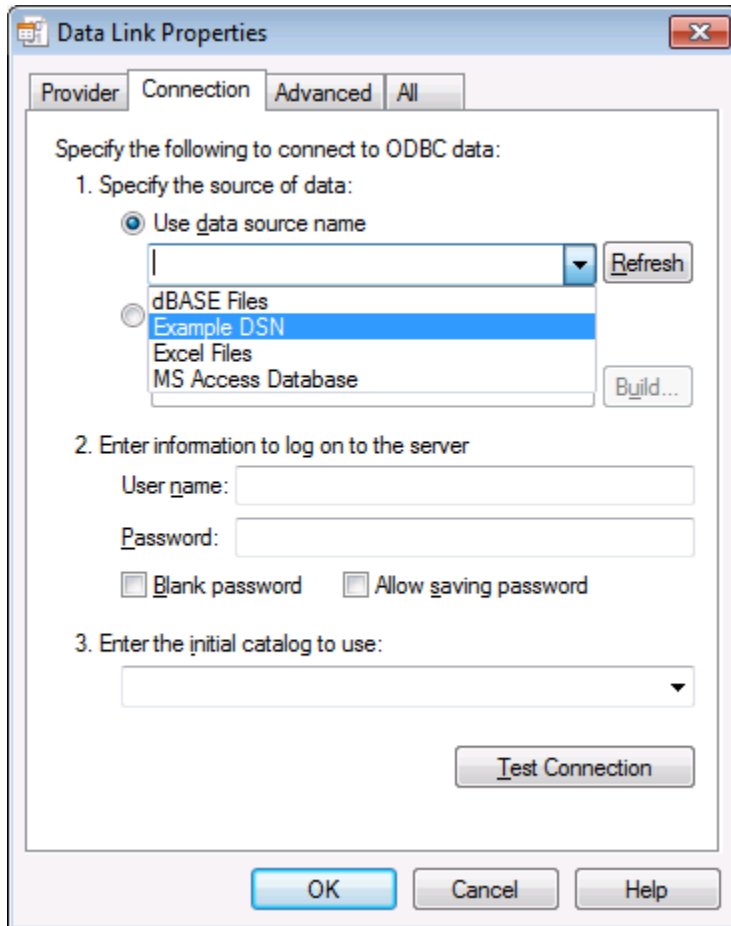


Click 'Configure' to specify your Data Link properties.





Select "Microsoft OLE DB Provider for ODBC Drivers" and click "Next >>".

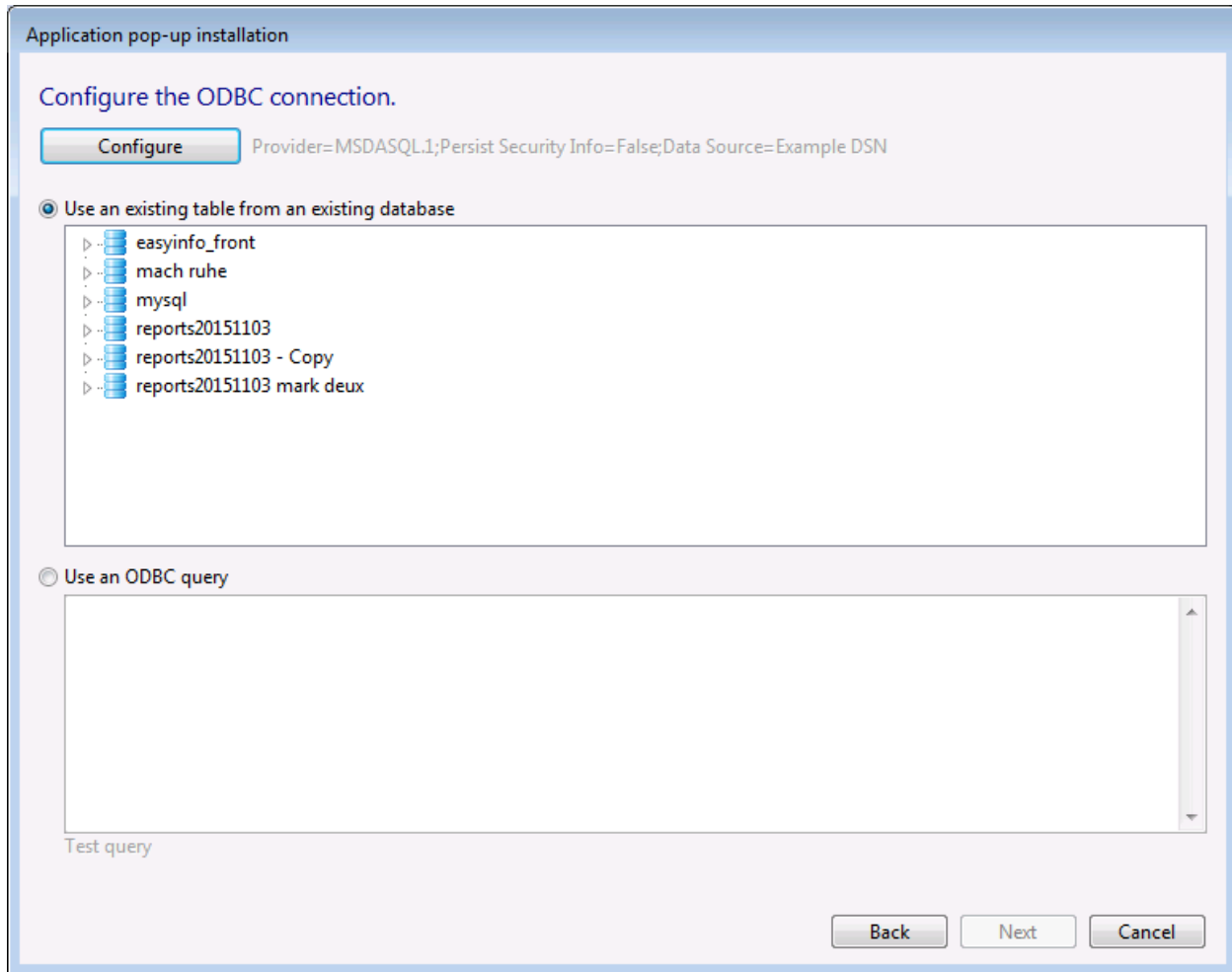


Here select the name of the System DSN that was configured with the Data Source Administrator. Usually, all required settings are specified in the DSN and at this point it thus suffices to click “OK” to confirm the specified properties.

**IMPORTANT:** Should you choose another option than using a pre-configured System DSN, then it is important to note that the credentials specified here need to be used by the Recognition Update Service, not the tool you are currently using. It is this service that needs the information to log on to the SQL server. Therefore, ‘Allow saving password’ must be checked in order for the Recognition Update Service to be able to use the credentials.

If the connection can be made, you may choose a specific database from the server using the dropdown list. This is not required and is also possible in the next step.

Click ‘Test Connection’ to check whether all information was entered correctly. Remember however that this test will be performed by the Recognition Configuration Tool, not the Recognition Update Service.



After the Data Link properties are set, the Recognition Update Service tests the connection and returns all available databases and tables. You can either select a specific table or create a custom ODBC query to combine data from multiple tables. On clicking “Test query” the Recognition Update Service will perform the query and return the record count upon success.

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