

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.



Login - New	ani i		
Select a page	Script 🔻 🚺 Help		
Server Roles User Mapping Securables Status	Login <u>n</u> ame: <u>W</u> indows authentication <u>S</u> QL Server authentication <u>P</u> assword: <u>C</u> orfirm password:	MSSQLUser	S <u>e</u> arch
	 Specify old password Old password: Enforce password policy Enforce password expiration User must change password 	tion vord at next login	
	Mapped to certificate Mapped to asymmetric key Map to Credential	· · · · · · · · · · · · · · · · · · ·	
Connection		· · · · · · · · · · · · · · · · · · ·	
Server: Connection:	Mapped Credentials	Credential Provider	
View connection properties			
Progress			Remove
Ready	Default <u>d</u> atabase: Default lan <u>q</u> uage:	ContactTest cdefault>	
		ОК	Cancel

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.

Application pop-up insta	llation
Configure the ODI	BC connection.
Configure	No ODBC selected

Click 'Configure' to specify your Data Link properties.



📑 Data Link Properties 💽 💽
Provider Connection Advanced All
Select the data you want to connect to:
OLE DB Provider(s)
Microsoft Jet 4.0 OLE DB Provider
Microsoft OLE DB Provider for Analysis Services 10.0 Microsoft OLE DB Provider for Indexing Service
Microsoft OLE DB Provider for ODBC Drivers
Microsoft OLE DB Provider for Oracle
Microsoft OLE DB Provider for SQL Server
Microsoft OLE DB Simple Provider
MSDataShape OLE DB Provider for Microsoft Directory Services
SQL Server Native Client 10.0
<u>N</u> ext >>
OK Cancel Help

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



📑 Data Link Properties 💽
Provider Connection Advanced All
Specify the following to connect to SQL Server data:
1. Select or enter a server name:
MyMSSQLServer,1433 Refresh
Enter information to log on to the server:
Use <u>W</u> indows NT Integrated security
<u>Use a specific user name and password:</u>
User name: MSSQLUser
Password:
Blank password Allow saving password
3. (Select the database on the server:
↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓
Attach a database file as a database name:
Using the rilename:
Test Connection
OK Cancel Help

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.



Application was unitabilitien	
Application pop-up installation	
Configure the ODBC second time	
Configure the ODBC connection.	
Configure Provider=SOLOLEDB.1:Password= ************************************	******
O Use an existing table from an existing database	
Andre	
Api201405	
ContactTest	
ContactTable	
b Logging	
p msdb	E
De Nephele	
Nephele_new	
P Phineas	
Phineas201312	
▷ ··· PhineasNumberReplicators	T
Use an ODBC query	
SELECT * EBOM (ContactTest) (dbo) (ContactTable)	
SEECET FROM [Contact rest].[ub0].[Contact rable]	
	-
Test query Query OK - 5 contacts found	
	Back Next Cancel

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.

🗿 ODBC I	Data Source Administrator
User DSN	System DSN File DSN Drivers Tracing Connection Pooling About
<u>S</u> ystem I	Data Sources:
Name	Driver Add
	<u>R</u> emove
	Configure
	An ODBC System data source stores information about how to connect to the indicated data provider. A System data source is visible to all users on this machine, including NT services.
	OK Cancel Apply Help

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.



Create New Data Source		×
	Select a driver for which you want to set up a Name Microsoft Text-Treiber (*.txt; *.csv) Microsoft Visual FoxPro Driver Microsoft Visual FoxPro-Treiber MySQL ODBC 5.3 ANSI Driver MySQL ODBC 5.3 Unicode Driver SQL Server SQL Server SQL Server Native Client 10.0	data source.
	< <u>B</u> ack Finish	Cancel

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

MySQL Connector/ODBC Data Source Configuration	
MysqL Connector/ODB	c 💿
Connection Parameter	S
Data Source <u>N</u> ame:	Example DSN
Description:	MySQL example
TCP/IP Server:	win 10rnd <u>P</u> ort: 3306
Named <u>Pi</u> pe:	
<u>U</u> ser:	root
Pass <u>w</u> ord:	•••••
Data <u>b</u> ase:	test 💌 Test
Details >>	OK <u>C</u> ancel <u>H</u> elp



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

🗿 ODBC Data Source Adm	inistrator		×
User DSN System DSN	File DSN Drivers	Tracing Connect	ction Pooling About
System Data Sources:			
Name Driver			A <u>d</u> d
Example DSN MySQL 0	DBC 5.3 Unicode [Driver	Remove
			Configure
An ODBC System the indicated d on this machine	em data source stor ata provider. A Sy e, including NT serv	res information abo stem data source is rices.	ut how to connect to s visible to all users
	ок	Cancel Ar	pply Help

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.

Application pop-up inst	allation
Configure the OD	BC connection.
Configure	No ODBC selected

Click 'Configure' to specify your Data Link properties.



🐨 Data Link Properties 🛛 💽	
Provider Connection Advanced All	
Select the data you want to connect to:	
OLE DB Provider(s)	
Microsoft Jet 4.0 OLE DB Provider	
Microsoft OLE DB Provider for Analysis Services 10.0	
Microsoft OLE DB Provider for Indexing Service	
Microsoft OLE DB Provider for Oracle	
Microsoft OLE DB Provider for Search	
Microsoft OLE DB Provider for SQL Server	
MSDataShape	
OLE DB Provider for Microsoft Directory Services	
SQL Server Native Client 10.0	
Next >>	
OK Cancel Help	

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



📑 Data Link Properties 💽
Provider Connection Advanced All
Specify the following to connect to ODBC data:
1. Specify the source of data:
Use <u>d</u> ata source name
Refresh
dBASE Files
Example DSN
Excel Files
Build
2. Enter information to log on to the server
User name:
Password:
Blank password Allow saving password
3. Enter the initial catalog to use:

Test Connection
OK Cancel Help

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.



Application pop-up installation	
Configure the ODBC connection.	
Configure Provider=MSDASQL.1;Persist Security Info=False;Data Source=Example DSN	
Output Search and S	
▶ -== easyinfo_front	
b 📲 mach ruhe	
b 📲 mysql	
▶ = reports20151103	
reports20151103 - Copy	
reports20151103 mark deux	
© Use an ODBC query	
Test query	_
rest query	
Back Nevt Cancel	
Cancel	

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.