VERTIFY

ODBC Setup Guide

This document outlines the required initial setup steps in the external system for the Vertify integration.

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SETUP GUIDE OVERVIEW

This setup guide will require the system administrator to complete steps outlined below in order to connect the external system application with Vertify.

Please note, this document may be subject to change and additional information required. Partnership with system administrator and/or support team may be necessary.

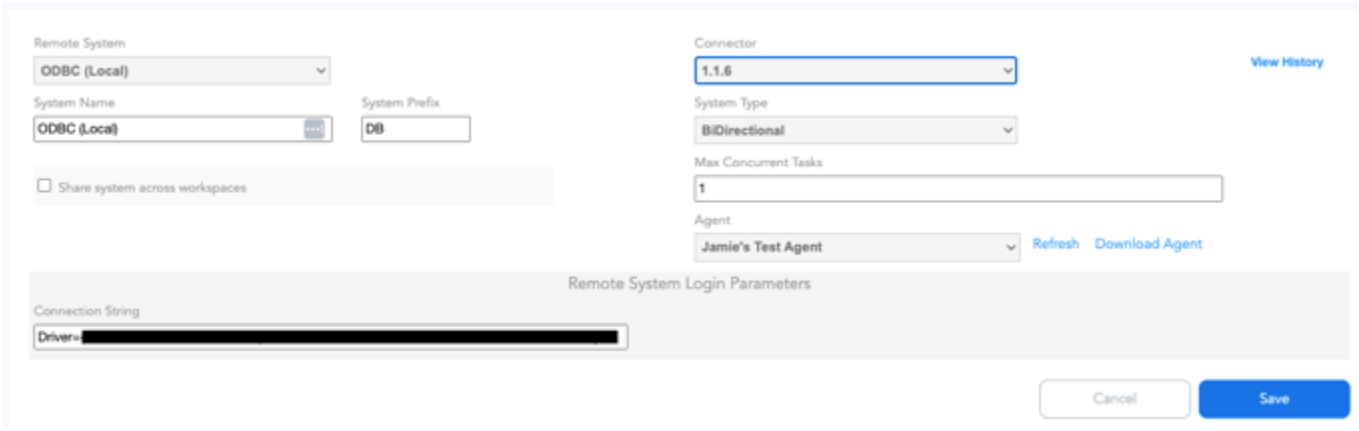
STEP 1: LOG INTO VERTIFY

- Log into Vertify using the credentials below:
    - Vertify URL: https://[TENANTNAME].us.vertify.com/
    - Username: Your email address
    - Password: Click the reset password link and choose a secure password for your account.

STEP 2: VERTIFY AGENT INSTALL (IF NEEDED)

- First, please confirm if your instance is hosted or on-prem:
    - If hosted, please move ahead to Step 3.
    - If on-prem and the agent is needed, please refer to the attached Vertify Agent document for instructions on downloading and installing the Vertify Agent.
- Please note that our best practice recommendation for installing the Agent is to have it installed on a machine that is NOT the same machine the database is on since it tends to consume a good bit of process and memory.
- Additionally, that will allow you to lock down what the agent is doing and isolate things in ways that may be harder with it running on the same machine.
- The Agent can go on any box that has network connectivity to the database, however, so feel free to install the Agent on the machine that works best for you.

STEP 3: CONNECT TO VERTIFY



Best Practice Note: whenever possible, Views are preferred over Tables to collect from since they allow more customization flexibility.

- After the agent is installed (if needed), generate and send your integration specialist the following information to enter on your behalf. Or, you may enter it directly in Vertify as pictured above.
- First, build the Connection String:
    - Example format: Driver={Driver Type};Server={IP Address,Port};Database={DatabaseName};Uid={Username};Pwd={Password};
- Next, if using Views, submit a support ticket with the following information and they will add the necessary login parameters to the system connect page in Vertify:
    - The link to your Vertify Tenant site.
    - Name of the ODBC system where the login parameters should be added.
    - Primary key field names and View names (required).
        - Example format: view1name(fieldname showing on collect area);view2name(fieldname);etc
    - The Last Modified Date field name - i.e., field name for each Table and/or View that we'll reference to collect changes from (required).
        - Example format: view1name(primarykey fieldname from live source);view2name(primarykey fieldname from live source);etc
- Once the login parameters are added to the system connect page, Scan the system again to display the objects + views on the Collect page. Please review and verify these show as expected.

- Move on to Collect Schema for the Views and Tables and verify the fields that show. We recommend one record hold a value in all fields.

Please reach out to our support team for further assistance as needed, or your Vertify One Team.