DATA PHONE

User's Guide

This document provides information about all Data Phone functionality.

Contents

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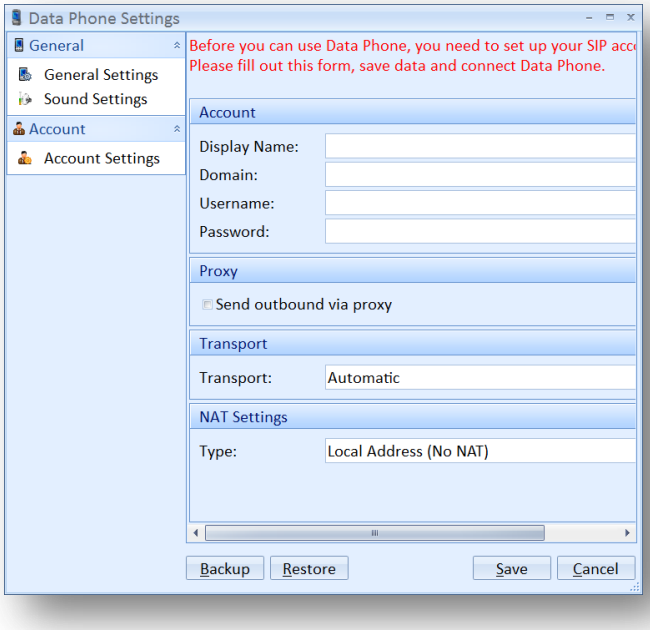
Getting Started

DataPhone SIP Phone provides phone functionality in conjunction with data stored on Microsoft SQL Server (contacts, history and status) or in text file if connection and queries are not set (default behavior).

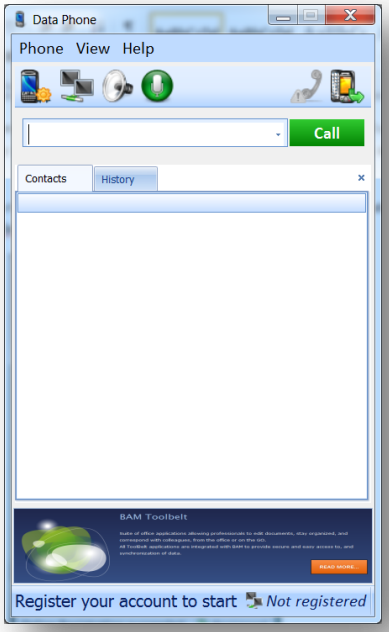
To install DataPhone go to http://www.exnp.com/dataphone/DataPhone.msi

After download start installation and follow the instructions. Once installed, you can start DataPhone from Desktop or Start >> DataPhone and following screen will pop up (if installed for the first time)



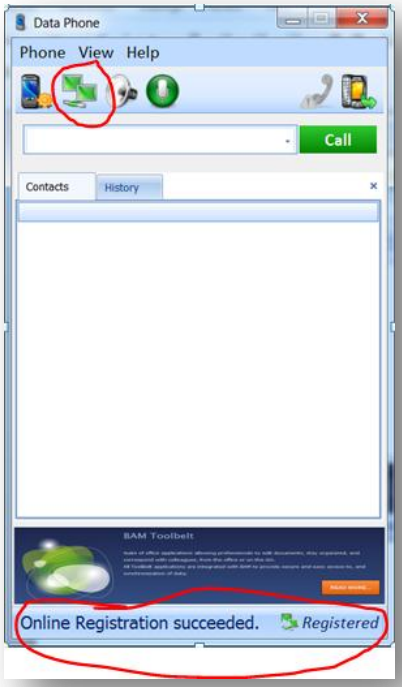
Minimum info required is Domain, Username and Password.
You should get account information from your VOiP provider.

Enter account information and adjust other parameters if required (more details below) and click "Save". "Data Phone Settings" screen with disappear and DataPhone will pop up



Go to Phone >> Connect or click

If account information and other parameters are correct screen will change into



DataPhone is now ready to be used. Enter phone number and click "Call"

Menu

Phone

Disconnect /Connect – if phone is registered (connected) it can disconnected (unregistered) from here and vice versa

Settings – will open setup screen (see Setup for more details)

Change Skin – change phone skin / adjust look.

Exit – disconnect (if connected) and close the application.

View

View Contacts – if checked Contact tab is visible, otherwise hidden

View History – if checked History tab is visible, otherwise hidden

Minimal Size – if checked screen will be resized to show only Menu, Toolbar, call section and status.

Help

Help – will open ??????

About – application version info

License Agreement – details your rights and entitlement to use Data Phone windows application.

Toolbar

Opens "Setup" screen where all setup related information can be entered. For more details see "Setup" chapter below.

Indicates that DataPhone is registered. Click on it to disconnect.

Indicates that DataPhone is disconnected. Click on it to connect.

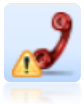
Indicates that DataPhone will ring when incoming call is detected. To mute incoming call ring click on it.

Indicates that DataPhone will not ring when incoming call is detected. To unmute incoming call ring click on it.

Indicates that microphone is not muted. To mute microphone click on it.

Indicates that microphone is muted. To unmute microphone click on it.

Indicates number of missed calls. If grayed out there were no missed calls since.



Indicates that there were missed calls since last time call was accepted.

Click on it and dial pad will show up in the upper right corner

Click on it and dial pad will disappear

Setup

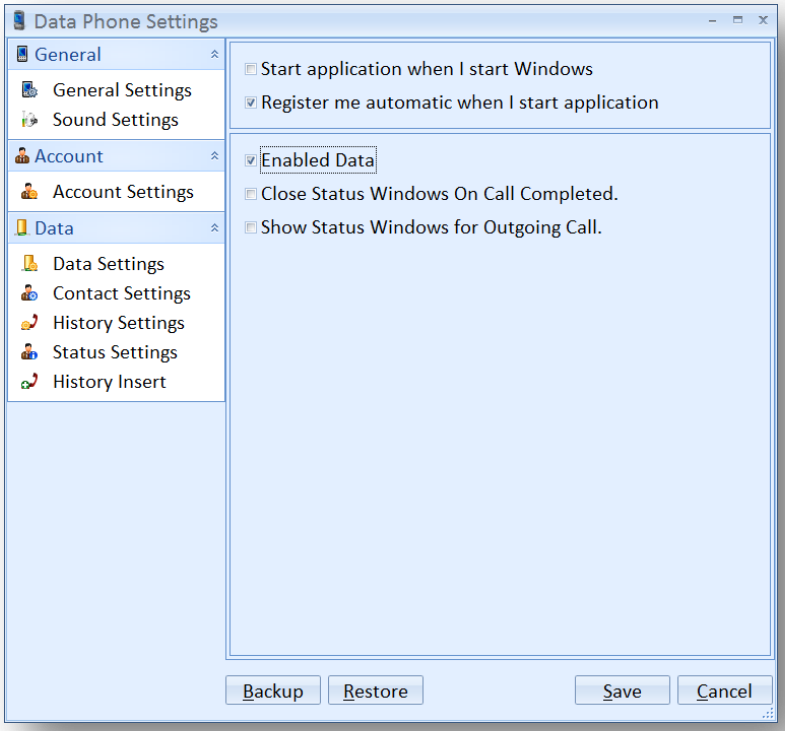
Setup can be accessed from main menu Phone >> Setting or from the toolbar

Setup is divided into the following categories:

General – setup of the global application parameters as well as sound settings

Account – PBX account related parameters

Data – SQL server connection and queries for contacts, history and status data retrieval and insert (visible only if "Enable Data" check box is checked).



Global Settings

Check boxes

"Start application when I start Windows" – if checked DataPhone will start when Windows starts

"Register when I start application" – if checked, DataPhone will connect to PBX when DataPhone starts. If not checked user has to do it manually every time when application starts.

"Enabled Data" – if checked SQL Server connection parameters as well as various queries can be set. More details in "Data" section below.

"Close Status Windows On Call Complete" - ??

"Show Status Windows for Outgoing Call" - ??

Buttons

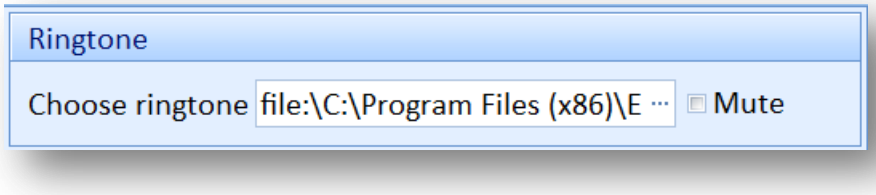
Backup – save existing configuration to another location

Restore – select configuration from another location (restore backup) to become active configuration

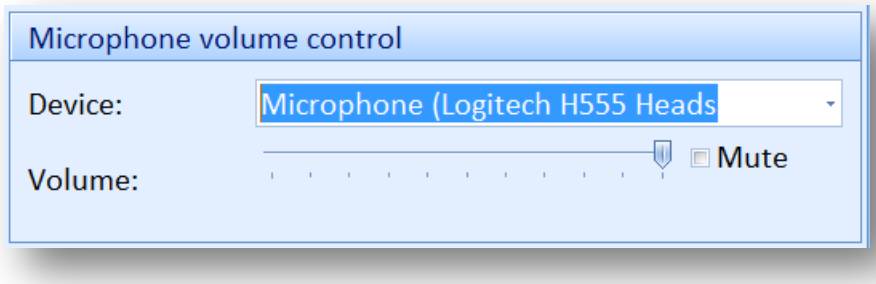
Save – configuration changes and close setup

Cancel – do not save configuration changes and close

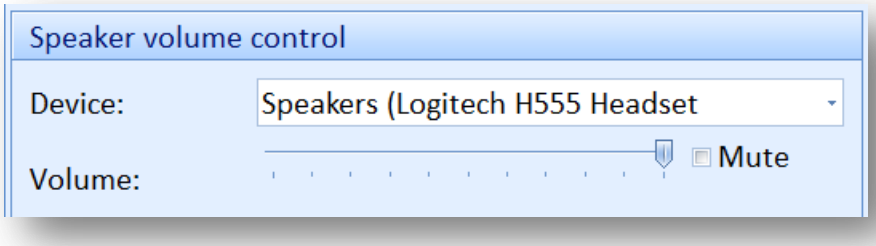
Sound Settings



Ringtone can be selected from the file. File must be in "wav" format. Ringtone will be muted, phone will not ring if "Mute" check box is checked.



If there are multiple devices available device to be used as microphone can be selected here. Microphone volume for selected device can be adjusted as well.



If there are multiple devices available device to be used as speaker can be selected here. Speaker volume for selected device can be adjusted as well.

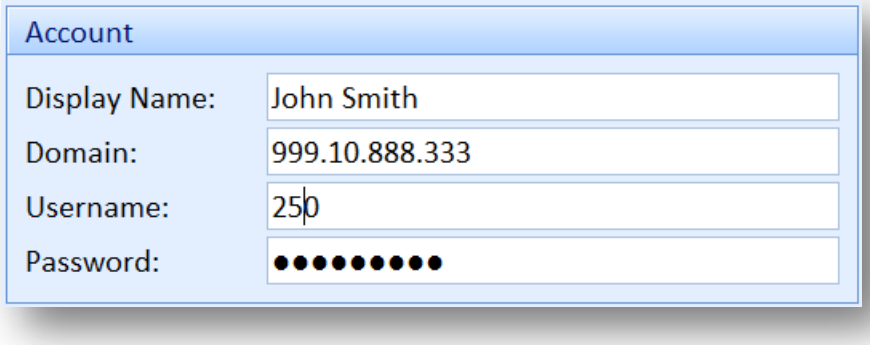
Backup – save existing configuration to another location

Restore – select configuration from another location (restore backup) to become active configuration

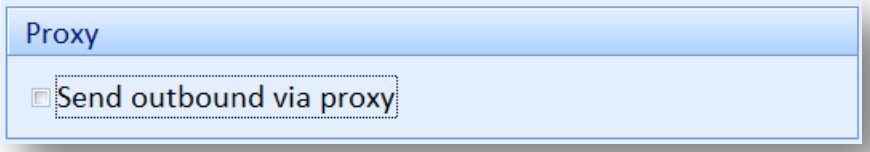
Save – configuration changes and close setup

Cancel – do not save configuration changes and close

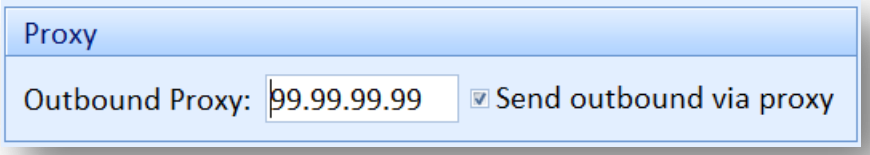
Account Settings



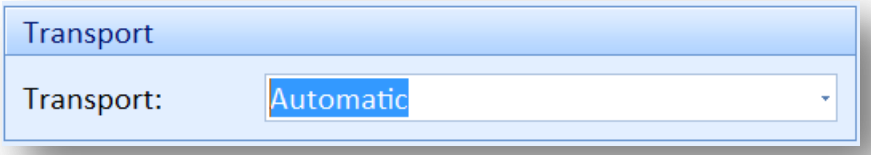
Data Phone requires at least Domain, Username and Password to connect to PBX. Ask your service provider for the info.



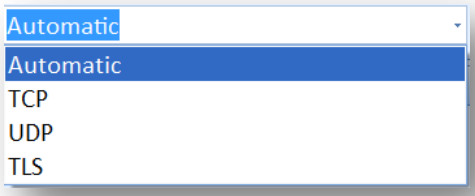
If DataPhone should connect with PBX via Proxy server then "Send outbound via proxy" should be checked and proxy server IP must be specified (in example below 99.99.99.99)

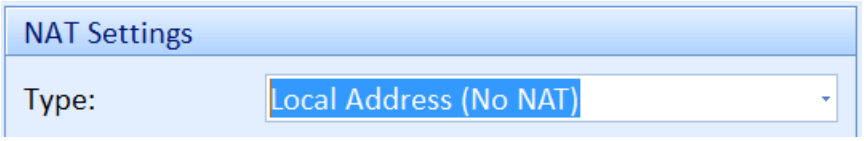


DataPhone will detect communication protocol automatically (default) setting

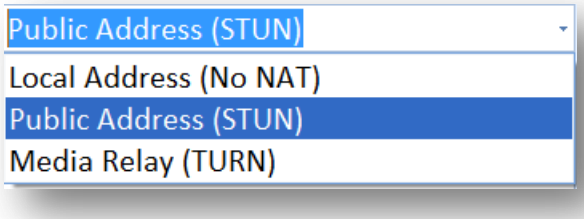


but TCP,UDP or TLS can be selected a protocols to be used.





If Network Address Translation (NAT) support is required there are two choices available



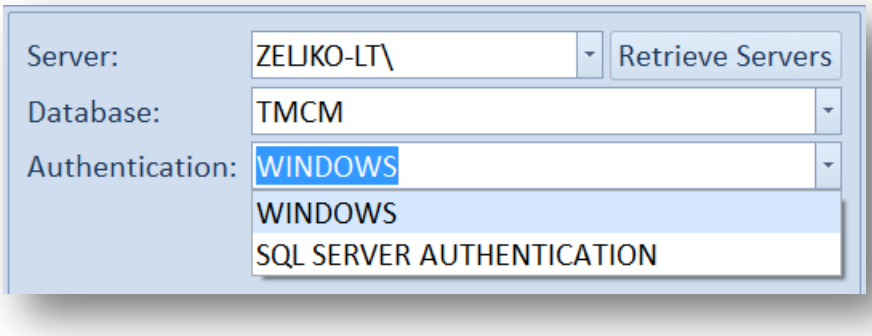
NOTE: If STUN or TURN were selected Server, Username and Password would be required.

Data Source

There are two choices available

Connect to Windows AZURE (unchecked)

When this check box is unchecked (default) MS SQL server from local machine or network will be used for data storage and retrieval



Retrieve Servers – click on that button to get list of all servers visible (local machine or LAN)

Server – drop down list with all visible servers. Select one you want rot use.

Database – select DB from the list of databases on selected server

Authentication – For"SQL SERVER AUTHENTICATION" valid "Username" and "Password" must be provided.

Connect to Windows Azure (checked)

Windows Azure SQL Server will be used for data storage and retrieval

Contact Settings

This tab allows definition of various contact lists (address books) to be retrieved from database at the time when DataPhone starts

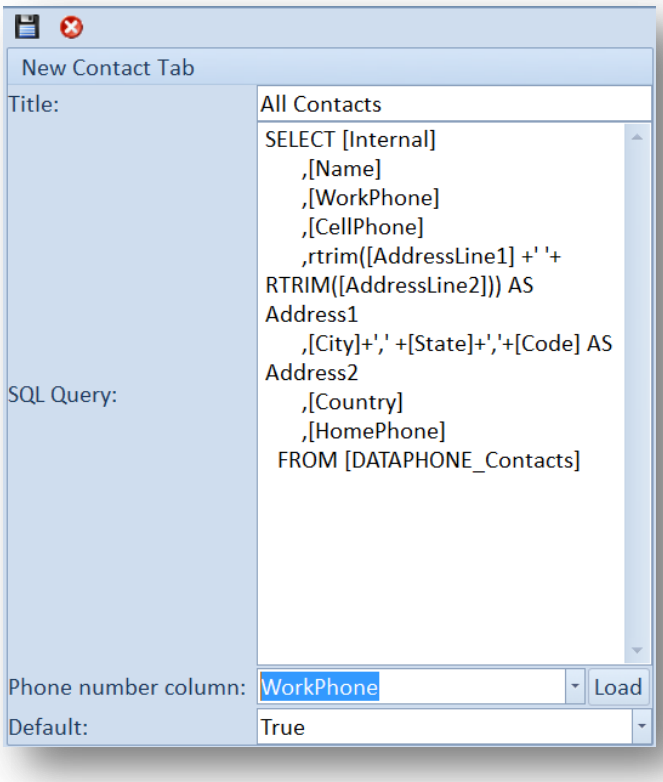
 - add new contact list

 - edit existing contact list

 - delete contact list

 - generate XML representation of the contact list (can be used as part of application call – more details in "Open DataPhone from another application")

Every list is defined by values in the following screen:



Tab title under "Contacts"

SQL Query used for data retrieval

Indicator which column contains primary phone number (Load – button will fill phone number columns list with available fields)

NOTE: Only one contact tab can have Default = True and that contact list will be displayed by default.

Select query: SELECT [Internal] ,[Name],[WorkPhone],[CellPhone],rtrim([AddressLine1] +' '+ RTRIM([AddressLine2])) AS Address1,[City]+',' +[State]+','+[Code] AS Address2,[Country],[HomePhone] FROM [DATAPHONE_Contacts]

History Settings

This tab allows definition of various contact lists (address books) to be retrieved from database at the time when DataPhone starts

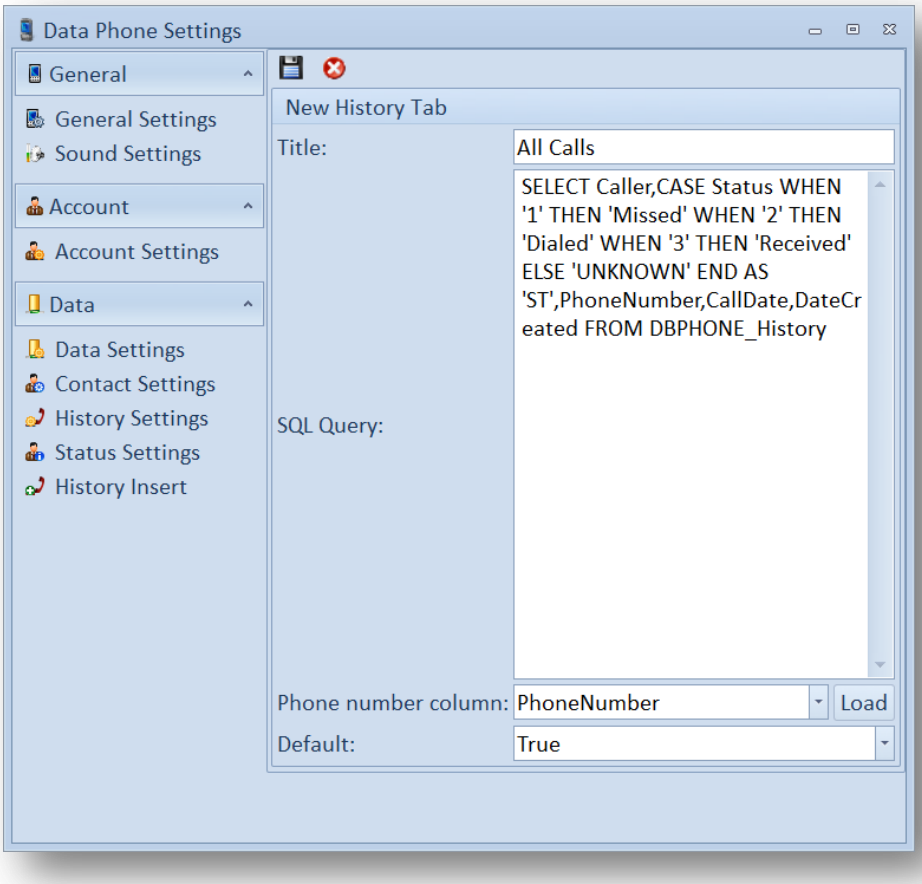
 - add new history list

 - edit existing history list

 - delete history list

 - generate XML representation of the history list (can be used as part of application call – more details in "Open DataPhone from another application")

Every list is defined by values in the following screen:



Tab title under "Contacts"

SQL Query used for data retrieval

Indicator which column contains primary phone number (Load – button will fill phone number columns list with available fields)

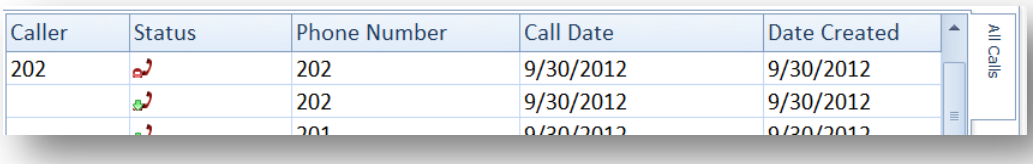
Select qury:
SELECT Caller,CASE Status WHEN '1' THEN 'Missed' WHEN '2' THEN 'Dialed' WHEN '3' THEN 'Received' ELSE 'UNKNOWN' END AS 'ST',PhoneNumber,CallDate,DateCreated FROM DBPHONE_History

NOTE: Only one hitory tab can have Default = True and that history list will be displayed by default.

Is "Status" field name is returned as part of the query then DataPhone expects value 1,2,3 (Missed,Dialed,Received) and will display icons instead of numbers in "status" column. Query:

SELECT Caller,Status,PhoneNumber,CallDate,DateCreated FROM DBPHONE_History

will have the following result



Caller Settings

This tab allows definition of various caller lists to be retrieved from database at the time when there is incoming call.

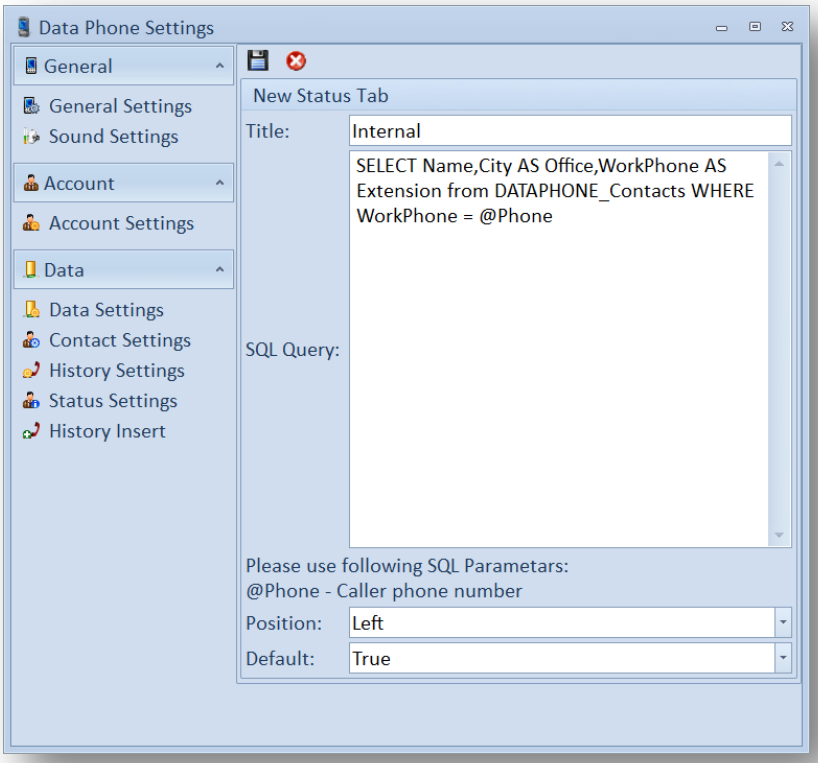
 - add new caller list

 - edit existing caller list

 - delete caller list

 - generate XML representation of the caller list (can be used as part of application call – more details in "Open DataPhone from another application")

Every list is defined by values in the following screen:



Tab title

SQL Query used for data retrieval

Indicator of the position of the screen with caller information relative to DataPhone main screen

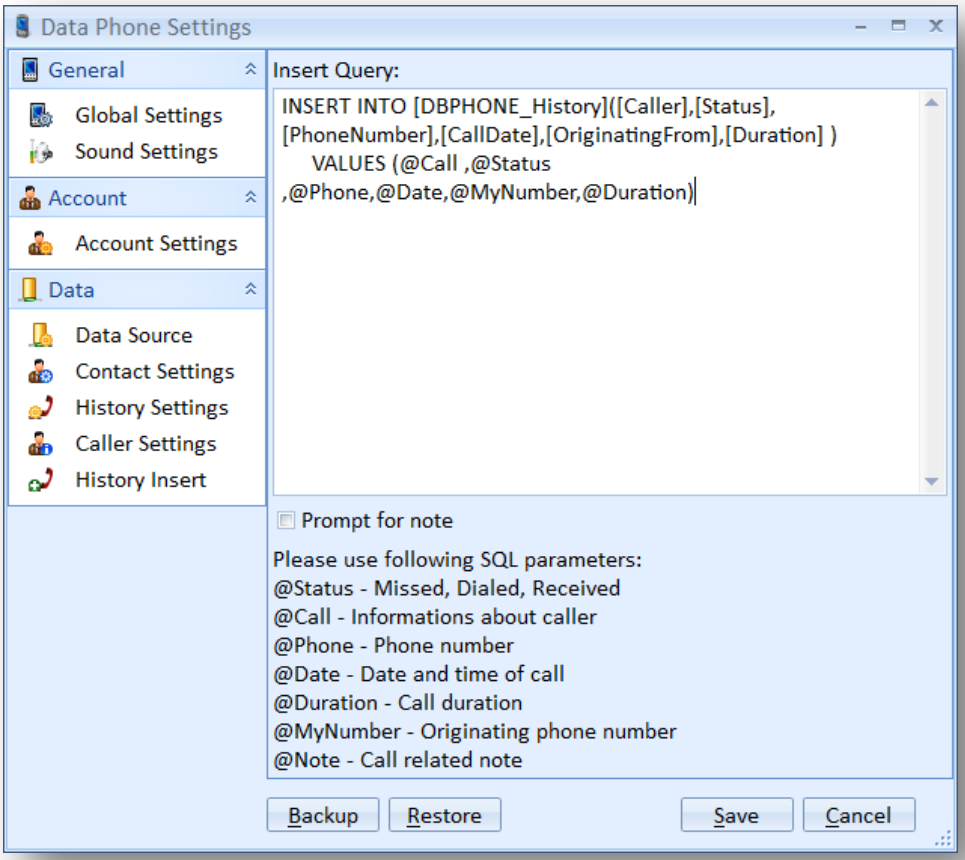
NOTE: Only one contact tab can have Default = True and that caller list will be displayed by default.

```
Select query:
SELECT Name,City AS Office,WorkPhone AS Extension from DATAPHONE_Contacts WHERE WorkPhone = @Phone
```

History Insert

Call related information can be saved by insert query such as

```
INSERT INTO
[DBPHONE_History]([Caller],[Status],[PhoneNumber],[CallDate],[OriginatingFrom],[Duration] )
    VALUES (@Call ,@Status ,@Phone,@Date,@MyNumber,@Duration)
```



Instead of insert query stored procedure can be used.

Example:

Stored procedure defined as

```
CREATE PROCEDURE [InsertIntoHistory]
  @Call nvarchar(50),@Status nvarchar(50),@PhoneNumber nvarchar(50),@Date
nvarchar(50)

  AS
  BEGIN
  INSERT INTO [DBPHONE_History]   ([Caller]   ,[Status]   ,[PhoneNumber]  ,[CallDate] )
   VALUES (@Call ,@Status ,@Phone ,@Date)
  END
```

can be used instead of insert statement

EXEC InsertIntoHistory @Call,@Status,@PhoneNumber,@Date

Open DataPhone from another application

There are three methods available to User for Data Phone "code" call (application call with parameters)

1 – using predefined configuration which Data Phone is using when opened by user

CALL:<phone_number>	Phone number to be dialed as soon as Data Phone starts

I f only phone number is sent DataPhone will use default configuration to complete the call

2 – From saved configuration file

Parameter	Description
CONFIGPATH:<path>	Instead of default configuration files use configuration files from specified path
CALL:<phone_number>	Phone number to be dialed as soon as Data Phone starts

NOTE: Should be no space between parameter name CONFIGPATH: and actual path. I.E. if default configuration is at C:\Application\DataPhone then parameter value would be

CONFIGPATH: C:\Application\DataPhone

I f only phone number and configpth is sent DataPhone will use configuration specified in CONFIG path to complete the call

3 – All parameters provided by calling application

All parameters should be provided – default configuration will not be used at all.

Parameter	Description
SERVER:<server_name>	Database server name
DATABASE:<DB_name>	Database with server
AUTHENTICATION: (WINDOWS ili SQL)	Must be "WINDOWS" or "SQL"
USER:<userName>	SQL User name if SQL authentication is specified
PASSWORD:<password>	SQL Password if SQL authentication is specified
CONNECTTOAZURE:True or False	Connect to Windows Azure (True) or locally (False)
CALL:<phone_number>	Phone number to be dialed as soon as Data Phone starts

If we do not want to use configuration file SIP parameters can be passed as arguments

Parameter	Description
SIPDOMAIN:<domain>	SIP domain name
SIPDISPLAYNAME:<display_name>	SIP Display name
SIPPASSWORD:<password>	SIP Password
SIPUSERNAME:<user_name>	SIP user name

If DB is used for History, contact and status then DB server name, DB name and authentication should be specified as well as

CONTACTTABS:<	Path to XML file with relevant contact retrieval information
HISTORYTABS:	Path to XML file with relevant history retrieval information
STATUSTABS:	Path to XML file with relevant status retrieval information
HISTORYINSERTQUERY:	Path to XML file with relevant history insert information

NOTE: If tabs were defined in existing configuration(s) use  to generate XML document to be referenced as parameter. (see Setup >> Contacts Settings ……)

Appendix - MS SQL DDL and queries

This appendix contains DDL for all tables used in User's Guide

-- DATAPHONE_Contacts

```
SET ANSI_NULLS ON
GO

SET QUOTED_IDENTIFIER ON
GO

CREATE TABLE [dbo].[DATAPHONE_Contacts](
	[Internal] [bit] NULL,
	[Name] [nvarchar](100) NOT NULL,
	[AddressLine1] [nvarchar](65) NULL,
	[AddressLine2] [nvarchar](65) NULL,
	[City] [nvarchar](35) NULL,
	[State] [nvarchar](50) NULL,
	[Code] [nvarchar](20) NULL,
	[Country] [nvarchar](50) NULL,
	[HomePhone] [nvarchar](20) NULL,
	[WorkPhone] [nvarchar](20) NULL,
	[CellPhone] [nvarchar](20) NULL,
	[Fax] [nvarchar](20) NULL,
	[DateCreated] [datetime] NULL,
	[DateModified] [datetime] NULL,
	[UserID] [nvarchar](50) NULL,
	[NoteID] [int] NULL,
	[RowID] [int] IDENTITY(1,1) NOT NULL,
 CONSTRAINT [PK_DATAPHONE_Contacts] PRIMARY KEY CLUSTERED
(
	[RowID] ASC
)WITH (PAD_INDEX  = OFF, STATISTICS_NORECOMPUTE  = OFF, IGNORE_DUP_KEY = OFF,
ALLOW_ROW_LOCKS  = ON, ALLOW_PAGE_LOCKS  = ON) ON [PRIMARY]
) ON [PRIMARY]

GO

EXEC sys.sp_addextendedproperty @name=N'MS_Description', @value=N'Name
created as: SalutationID2+Firstname+MiddleName+LastName' ,
@level0type=N'SCHEMA',@level0name=N'dbo',
@level1type=N'TABLE',@level1name=N'DATAPHONE_Contacts',
@level2type=N'COLUMN',@level2name=N'Name'
GO

EXEC sys.sp_addextendedproperty @name=N'MS_Description', @value=N'Address
line with street, unit, direction …' ,
@level0type=N'SCHEMA',@level0name=N'dbo',
@level1type=N'TABLE',@level1name=N'DATAPHONE_Contacts',
@level2type=N'COLUMN',@level2name=N'AddressLine1'
GO
```

```
EXEC sys.sp_addextendedproperty @name=N'MS_Description', @value=N'Additional
address line (if required)' , @level0type=N'SCHEMA',@level0name=N'dbo',
@level1type=N'TABLE',@level1name=N'DATAPHONE_Contacts',
@level2type=N'COLUMN',@level2name=N'AddressLine2'
GO

EXEC sys.sp_addextendedproperty @name=N'MS_Description', @value=N'City or
third address line for generic addresses (for generic addresses province and
postal code are empty and they are part of the Address lines)' ,
@level0type=N'SCHEMA',@level0name=N'dbo',
@level1type=N'TABLE',@level1name=N'DATAPHONE_Contacts',
@level2type=N'COLUMN',@level2name=N'City'
GO

EXEC sys.sp_addextendedproperty @name=N'MS_Description', @value=N'Province,
state …..identifier' , @level0type=N'SCHEMA',@level0name=N'dbo',
@level1type=N'TABLE',@level1name=N'DATAPHONE_Contacts',
@level2type=N'COLUMN',@level2name=N'State'
GO

EXEC sys.sp_addextendedproperty @name=N'MS_Description', @value=N'Postal
Code, ZIP, ZIP + 4 ….' , @level0type=N'SCHEMA',@level0name=N'dbo',
@level1type=N'TABLE',@level1name=N'DATAPHONE_Contacts',
@level2type=N'COLUMN',@level2name=N'Code'
GO

EXEC sys.sp_addextendedproperty @name=N'MS_Description', @value=N'Country
identifier or empty' , @level0type=N'SCHEMA',@level0name=N'dbo',
@level1type=N'TABLE',@level1name=N'DATAPHONE_Contacts',
@level2type=N'COLUMN',@level2name=N'Country'
GO

EXEC sys.sp_addextendedproperty @name=N'MS_Description', @value=N'Primary
Home phone number' , @level0type=N'SCHEMA',@level0name=N'dbo',
@level1type=N'TABLE',@level1name=N'DATAPHONE_Contacts',
@level2type=N'COLUMN',@level2name=N'HomePhone'
GO

EXEC sys.sp_addextendedproperty @name=N'MS_Description', @value=N'Primary
Work phone number including extension' ,
@level0type=N'SCHEMA',@level0name=N'dbo',
@level1type=N'TABLE',@level1name=N'DATAPHONE_Contacts',
@level2type=N'COLUMN',@level2name=N'WorkPhone'
GO

EXEC sys.sp_addextendedproperty @name=N'MS_Description', @value=N'Primary
Cell phone number' , @level0type=N'SCHEMA',@level0name=N'dbo',
@level1type=N'TABLE',@level1name=N'DATAPHONE_Contacts',
@level2type=N'COLUMN',@level2name=N'CellPhone'
GO

EXEC sys.sp_addextendedproperty @name=N'MS_Description', @value=N'Secondary
fax number' , @level0type=N'SCHEMA',@level0name=N'dbo',
@level1type=N'TABLE',@level1name=N'DATAPHONE_Contacts',
@level2type=N'COLUMN',@level2name=N'Fax'
GO
```

```
EXEC sys.sp_addextendedproperty @name=N'MS_Description', @value=N'Date / time
when it was created' , @level0type=N'SCHEMA',@level0name=N'dbo',
@level1type=N'TABLE',@level1name=N'DATAPHONE_Contacts',
@level2type=N'COLUMN',@level2name=N'DateCreated'
GO

EXEC sys.sp_addextendedproperty @name=N'MS_Description', @value=N'Date / time
of the last modification ' , @level0type=N'SCHEMA',@level0name=N'dbo',
@level1type=N'TABLE',@level1name=N'DATAPHONE_Contacts',
@level2type=N'COLUMN',@level2name=N'DateModified'
GO

EXEC sys.sp_addextendedproperty @name=N'MS_Description', @value=N'Modified /
created user id' , @level0type=N'SCHEMA',@level0name=N'dbo',
@level1type=N'TABLE',@level1name=N'DATAPHONE_Contacts',
@level2type=N'COLUMN',@level2name=N'UserID'
GO

EXEC sys.sp_addextendedproperty @name=N'MS_Description', @value=N'Free form
note index' , @level0type=N'SCHEMA',@level0name=N'dbo',
@level1type=N'TABLE',@level1name=N'DATAPHONE_Contacts',
@level2type=N'COLUMN',@level2name=N'NoteID'
GO

EXEC sys.sp_addextendedproperty @name=N'MS_Description', @value=N'Row
identity column' , @level0type=N'SCHEMA',@level0name=N'dbo',
@level1type=N'TABLE',@level1name=N'DATAPHONE_Contacts',
@level2type=N'COLUMN',@level2name=N'RowID'
GO

ALTER TABLE [dbo].[DATAPHONE_Contacts] ADD  CONSTRAINT
[DF_Table_1_CountryID2]  DEFAULT ((0)) FOR [Country]
GO

ALTER TABLE [dbo].[DATAPHONE_Contacts] ADD  CONSTRAINT
[DF_DATAPHONE_Contacts_DateCreated]  DEFAULT (getdate()) FOR [DateCreated]
GO

ALTER TABLE [dbo].[DATAPHONE_Contacts] ADD  CONSTRAINT
[DF_DATAPHONE_Contacts_UserID]  DEFAULT (suser_sname()) FOR [UserID]
GO

ALTER TABLE [dbo].[DATAPHONE_Contacts] ADD  CONSTRAINT
[DF_DATAPHONE_Contacts_NoteID]  DEFAULT ((0)) FOR [NoteID]
GO
```

--Insert Contact

```
INSERT INTO [BAM].[dbo].[DATAPHONE_Contacts]

([Internal],[Name],[AddressLine1],[AddressLine2],[City],[State],[Code]
           ,[Country],[HomePhone],[WorkPhone],[CellPhone],[Fax])
     VALUES
```

```
           (1,'John Smith','1 Main Str','','Toronto','ON',''
           ,'CANADA','4169998888','200','4169998887','')
INSERT INTO [BAM].[dbo].[DATAPHONE_Contacts]

([Internal],[Name],[AddressLine1],[AddressLine2],[City],[State],[Code]
           ,[Country],[HomePhone],[WorkPhone],[CellPhone],[Fax])
     VALUES
           (1,'Anita Doe','2 Main Str','','Toronto','ON',''
           ,'CANADA','4169989888','201','4169989887','')
INSERT INTO [BAM].[dbo].[DATAPHONE_Contacts]

([Internal],[Name],[AddressLine1],[AddressLine2],[City],[State],[Code]
           ,[Country],[HomePhone],[WorkPhone],[CellPhone],[Fax])
    VALUES
           (1,'Robert Watson','3 Main Str','','New York','NY',''
           ,'USA','2019998888','202','2019998887','')
GO
```

-- DBPHONE_History

```
SET ANSI_NULLS ON
GO

SET QUOTED_IDENTIFIER ON
GO

CREATE TABLE [dbo].[DBPHONE_History](
      [OriginatingFrom] [nvarchar](50) NULL,
      [Caller] [nvarchar](50) NULL,
      [Status] [nvarchar](50) NULL,
      [PhoneNumber] [nvarchar](50) NULL,
      [CallDate] [nvarchar](50) NULL,
      [Comment] [nvarchar](200) NULL,
      [Duration] [nvarchar] (10) NULL,
      [DateCreated] [datetime] NULL,
      [DateModified] [datetime] NULL,
      [UserID] [nvarchar](50) NULL,
      [NoteID] [int] NULL,
      [RowID] [int] IDENTITY(1,1) NOT NULL,
 CONSTRAINT [PK_DBPHONE_History] PRIMARY KEY CLUSTERED
(
      [RowID] ASC
)WITH (PAD_INDEX  = OFF, STATISTICS_NORECOMPUTE  = OFF, IGNORE_DUP_KEY = OFF,
ALLOW_ROW_LOCKS  = ON, ALLOW_PAGE_LOCKS  = ON)
)
GO

ALTER TABLE [dbo].[DBPHONE_History] ADD  CONSTRAINT
[DF_DBPHONE_History_DateCreated]  DEFAULT (getdate()) FOR [DateCreated]
GO

ALTER TABLE [dbo].[DBPHONE_History] ADD  CONSTRAINT
[DF_DBPHONE_History_UserID]  DEFAULT (suser_sname()) FOR [UserID]
GO
```

```
ALTER TABLE [dbo].[DBPHONE_History] ADD  CONSTRAINT
[DF_DBPHONE_History_NoteID]  DEFAULT ((0)) FOR [NoteID]

GO
```

--SP InsertIntoHistory

```
CREATE PROCEDURE [InsertIntoHistory]
   @Call nvarchar(50),@Status nvarchar(50),@PhoneNumber nvarchar(50),@Date
nvarchar(50)

    AS
    BEGIN
    INSERT INTO [DBPHONE_History]    ([Caller]   ,[Status]   ,[PhoneNumber]
,[CallDate] )
     VALUES (@Call ,@Status ,@PhoneNumber  ,@Date)
    END
```