

D&B360 Administration and Installation Guide

for Siebel CRM

Version 2.2

©2013 Dun & Bradstreet, Incorporated. All rights reserved.

D&B360 is a trademark or registered trademark of Dun and Bradstreet, Incorporated. Other trademarks used herein are the trademarks or registered trademarks of their respective owners.

This document is a work of authorship that belongs to Dun and Bradstreet, Incorporated and is protected by United States and foreign copyright laws and international copyright treaties. The use of the software and this Documentation is governed by the Dun and Bradstreet Incorporated software license agreement.



Table of Contents

About this Guide	vi
Audience and Purpose	vi
Conventions	vi
Navigating in the PDF	vi
Related Documentation	vii
Chapter 1: Introduction	1-1
Product Benefits	1-1
Guide Objectives	1-2
Guide Organization	1-2
Access to Features	1-2
Chapter 2: Getting Started	2-1
About D&B360	2-1
Considerations for Administrators	2-2
Required Siebel User Interface Mode	2-2
User Access Level	2-2
Back Up Your Data	
D&B360 Packages	
File Contents	2-4
Using Rest of World	2-8



Rest of World Applications	2-9
Setting Alerts	2-10
Chapter 3: Preparing Deployment Packages	3-1
Copying Folders from the Zipped File	3-1
Creating Descriptor Files	3-2
Moving Packages to the Default Package Directory	3-5
Chapter 4: Deploying D&B Packages	4-1
Initiating Package Deployment for DnB1, DnB2, and DnB3	4-1
Locating and Validating the Enterprise Server	4-2
Locating the Enterprise Server	4-2
Validating the Enterprise Profile File	4-4
Processing DnB1, DnB2, DnB3 Packages	4-4
Compiling the Application	4-6
Processing the DnB4 and DnB5 Packages	4-9
Applying Table Changes	4-11
Adding the D&B360 Window to the Application	4-12
Chapter 5: Generating the Org ID	5-1
Completing the Installation Setup	5-1
Activating the Installation	5-2
Completing the D&B360 Registration	5-4
Chapter 6: Installing and Configuring the Informatica Cloud Secure Agent	6-1
Preparing for Administration of Batch Jobs	6-1
Installing the Informatica Cloud Secure Agent	6-3
Configuring Connectivity Between the Informatica Cloud Secure Agent and the Siebel Database OE	3DC6-6



Creating the OBDC Data Source for Windows Platforms	6-7
Chapter 7: Establishing Permissions for Roles Within D&B360	7-1
Setting Permissions for Users	7-1
Chapter 8: Managing Batches	8-1
Overview of Batch Jobs	8-1
Understanding Key Features of D&B360 Batch Jobs	8-2
Record Eligibility	8-2
Confidence Code Threshold Facts	8-2
Validating D-U-N-S Numbers	8-2
Scheduling Batch Jobs	8-3
Scheduling New Batch Jobs	8-3
Scheduling Refresh Batch Johs	
Chapter 9: Reviewing Activity Logs, the Admin Review List, and D&B360 Reports	9-1
Chapter 9: Reviewing Activity Logs, the Admin Review List, and D&B360 Reports	9-1 9-1
Chapter 9: Reviewing Activity Logs, the Admin Review List, and D&B360 Reports Expanding Your Reporting Options Viewing Callout Logs	9-1 9-1 .9-2
Chapter 9: Reviewing Activity Logs, the Admin Review List, and D&B360 Reports Expanding Your Reporting Options Viewing Callout Logs Accessing Activity Logs and the Admin Review List	
Chapter 9: Reviewing Activity Logs, the Admin Review List, and D&B360 Reports Expanding Your Reporting Options Viewing Callout Logs Accessing Activity Logs and the Admin Review List Viewing and Processing Failed Batch Records in the Admin Review List	
Chapter 9: Reviewing Activity Logs, the Admin Review List, and D&B360 Reports Expanding Your Reporting Options Viewing Callout Logs Accessing Activity Logs and the Admin Review List Viewing and Processing Failed Batch Records in the Admin Review List Reviewing D&B360 Reports	
Chapter 9: Reviewing Activity Logs, the Admin Review List, and D&B360 Reports Expanding Your Reporting Options Viewing Callout Logs Accessing Activity Logs and the Admin Review List Viewing and Processing Failed Batch Records in the Admin Review List Reviewing D&B360 Reports Duplicate DUNS Report	
Chapter 9: Reviewing Activity Logs, the Admin Review List, and D&B360 Reports Expanding Your Reporting Options Viewing Callout Logs Accessing Activity Logs and the Admin Review List Viewing and Processing Failed Batch Records in the Admin Review List Reviewing D&B360 Reports Duplicate DUNS Report Using the Recertified D-U-N-S Report	
Chapter 9: Reviewing Activity Logs, the Admin Review List, and D&B360 Reports Expanding Your Reporting Options Viewing Callout Logs Accessing Activity Logs and the Admin Review List Viewing and Processing Failed Batch Records in the Admin Review List Reviewing D&B360 Reports Duplicate DUNS Report Using the Recertified D-U-N-S Report	
Chapter 9: Reviewing Activity Logs, the Admin Review List, and D&B360 Reports Expanding Your Reporting Options Viewing Callout Logs Accessing Activity Logs and the Admin Review List Viewing and Processing Failed Batch Records in the Admin Review List Viewing D&B360 Reports Duplicate DUNS Report Using the Recertified D-U-N-S Report Frequently Asked Questions (FAQ's)	
Chapter 9: Reviewing Activity Logs, the Admin Review List, and D&B360 Reports Expanding Your Reporting Options Viewing Callout Logs Accessing Activity Logs and the Admin Review List Viewing and Processing Failed Batch Records in the Admin Review List Viewing D&B360 Reports Duplicate DUNS Report Using the Recertified D-U-N-S Report Appendix A: Troubleshooting Frequently Asked Questions (FAQ's) Tables Created During Installation	





About this Guide

Audience and Purpose

This guide is for Siebel CRM administrators who plan to install the D&B360 software application in their CRM environment.

We assume that you are familiar with how to use a command-line interface and how to download and copy executable files to your local directory.

If you are interested in more training and education about using our products, learning opportunities are available here: D&B Training and Education Opportunities for Admin Users.

Conventions

Note: Notes mean reader take note and provide helpful suggestions.

(!) Important Note: Important Notes mean *reader be careful*. In this situation, you might do something that could result in loss of data.

In sections that include instructions for using the D&B360 and CRM graphical user interface (GUI):

- Text in **bold** indicates the name of a window, tab, field, area, or button that you click or interact with.
- Text in monospace indicates a directory path or a command that you need to type in the command-line interface.

Navigating in the PDF

Note: To download the free, latest version of Adobe Reader, go to this web site: <u>http://get.adobe.com/reader/</u>.

- 1. To return to the page you were on after you click a cross reference link, press Alt + Left Arrow.
- 2. To return to the first page of the document, press the Shift + Home.



3. To navigate in the PDF file or change the Adobe Reader settings, on the Adobe Reader menu, select **View > Page Navigation**, **Page Display**, and **Zoom**.

Related Documentation

For more information about D&B360 from the user perspective, refer to the D&B360 User Guide. For more information about using the Siebel CRM, refer to the CRM documentation.





Chapter 1: Introduction

Welcome to the *D&B360 Administration and Installation Guide*, which instantly connects you to customer and prospective customer data that only D&B can provide – plus relevant rest-of-world content, all within your instance of Siebel CRM.

Product Benefits	1-1
Guide Objectives	1-2
Guide Organization	1-2
Access to Features	1-2

Product Benefits

With D&B360, you get the business insight you need, the D&B data quality you want, and the ease-of-use you deserve.



Now you can see all angles of your prospects and customers within your CRM:

- Know your customers better.
- Acquire new prospects.
- Sell deeper into organizations.
- Improve salesperson effectiveness.

D&B empowers you with relevant and credible information, facilitating your role as a trusted advisor to enable new sales.



SEE NEW OPPORTUNITIES	Seeing your customers and prospects in a new way can uncover new information and new-sale entry points.
ACCELERATE YOUR SALES CYCLE	Once you establish relevance and credibility, customers will trust you with their business.
EXPAND YOUR CUSTOMER FOOTPRINT	Build customer relationships on a foundation that is based on relevance, credibility, and trust.
POSITION YOUR SUCCESS	With D&B360, you have a powerful tool that helps you to better understand your customers pain points, respond to their needs, and ultimately positions you to win more business.
	The D&B360 platform features On-demand access to D&B data, automatic refresh and synchronization with the D&B database, and seamless integration of rest-of-world data.

Guide Objectives

The D&B360 Administration and Installation Guide*for* Siebel CRM provides instructions for general D&B360 Administrator tasks.

Guide Organization

The D&B360 Administration and Installation Guide is organized by tasks groups, which are presented in the sequence in which they occur. For instance, you need to consider the pre-installation requirements before you can install or upgrade the product. Likewise, you need to install the product before you can configure profiles or deploy the application.

Access to Features

D&B360 is a powerful tool. You might find more than one way to do a specific task and learn that you can use a feature or function in more than one area.

For that reason, this guide is organized by functions or tasks you are trying to accomplish. References to links or menu options that help you navigate your CRM are also included.





Chapter 2: Getting Started

2-1
2-2
2-2
2-2
2-2
2-3
2-4
2-8
2-9
2-10

Note: For more information about the user interface and other features of the Siebel CRM, refer the user, getting started, installation, and administrator guides for that CRM.

About D&B360

To find basic information and useful links for interacting with D&B360, click **About D&B360**, located on the D&B360 menu. You will also find a link to the D&B training web sites here.





Considerations for Administrators

You will be working within Siebel CRM to establish the settings that you need. Take time to familiarize yourself with Siebel operations and the location of the Siebel CRM documentation. This information will help you successfully complete tasks as an administrator for D&B360 for Siebel CRM.

Required Siebel User Interface Mode

Siebel has two user interface modes: High Interactivity (HI) and Standard Interactivity (SI). The main differences between the two modes are how users access the features and which browser they use.

High interactivity	 Navigation is located below the D&B360 tab as links Must run using proper settings on an IE 7 or 8 browser
Standard Interactivity	Navigation is located in the top left menuCan run on both IE and Firefox 3.6

User Access Level

To access D&B360, we recommend that users are assigned an SSE role.

Back Up Your Data

We highly recommend that you back up your data before you install D&B360. For more information, see:

http://download.oracle.com/docs/cd/E14004_01/books/AppDeployMgr/AppDeployMgr_DeployPkg13.html



D&B360 Packages

D&B360 is currently available in three packages: Tier 1, Tier 2 and Tier 3. The following table provides an overview of what is available in each package.

Location and Feature	Tier 1	Tier 2	Tier 3
COMPANY		·	
Company Matching	✓	✓	✓
Company Data	·	·	
➢ ▷ D&B360+ - (76 fields)	✓	×	✓
➤ D&B360+ - (100 fields)	not available	~	✓
D&B360 View — (Related Accounts)	not available	~	✓
D&B360 View — (Family Tree Query)	not available	not available	✓
D&B360 View — (Family Tree Hierarchy)	not available	not available	✓
D&B360 Marketing Prescreen — (Accounts)	not available	~	✓
D&B Competitors — (Accounts)	not available	not available	✓
D&B Industries powered by First Research — (Accounts)	not available	not available	✓
D&B Financial – (Accounts)	not available	not available	✓
D&B360 Account Refresh – (Accounts)	✓	✓	~
CONTACTS			
Contact Search — (including Contact Name Search)	✓	✓	✓
Contact Append with smart append & merge	✓	✓	✓
REST OF WORLD (Companies and Contacts)			
Favorites	✓	✓	✓
Alerts	✓	✓	~
➢ ➢ News	✓	~	~
Finance	✓	~	~
Map	✓	✓	✓



Location and Feature	Tier 1	Tier 2	Tier 3
YouTube	✓	~	~
Blogs	✓	~	✓
Facebook	✓	~	1
> > Twitter	✓	~	1
LinkedIn	✓	~	1
Skype	✓	~	1
D&B360 BUILD A LIST		-	
D&B360 Build-A-List	✓	~	1
D&B360 Look-A-Like	not available	~	1
D&B INDUSTRIES POWERED BY FIRST RESEARCH		-	
D&B Industry Search	not available	not available	~

Note: Not all features and content are available in all packages. If you have questions, contact your D&B sales representative.

File Contents

The zipped file that you downloaded from the D&B360 Registration site includes all of the software you need to add the value of D&B360 to your company's CRM system. Ensure that your file contains the following:



Folder	Contents
Dnb1	Repository folder:
	(1) Table ACCOUNTXT.sif
	(2) Table ACCOUNTXT_des.xml
	(3) TABLE CCODE.sif
	(4) TABLE CCODE_des
	(5) TABLE DNBADMIN.sif
	(6) TABLE DNBADMIN_des.xml
	(7) TABLE DNBCODE.sif
	(8) TABLE DNBCODE_des.xml
	(9) TABLE DNBCOMPANY.sif
	(10) TABLE DNBCOMPANY_des.xml
	(11) TABLE DNBCONTACT.sif
	(12) TABLE DNBCONTACT_des.xml



Dnb2	Repository folder:
	(1) TABLE DNBCOMPANYXR.sif
	(2) TABLE DNBCOMPANYXR_des.xml
	(3) TABLE DNBCONTACTXR.sif
	(4) TABLE DNBCONTACTXR _des.xml
	(5) TABLE DNBOPPTY2XR.sif
	(6) TABLE DNBOPPTY2XR_des.xml
	(7) TABLE DNBOPPTYXR.sif
	(8) TABLE DNBOPPTYXR _des.xml



Repository folder:
(1) 10IO.sif
(2) 10I0_des.xml
(3) Applets.sif
(4) Applets_des.xml
(5) BC.sif
(6) BC_des.xml
(7) BO.sif
(8) BO_des.xml
(9) BS.sif
(10) BS_des.xml
(11) Links.sif
(12) Links_des.xml
(13) Screens.sif
(14) Screens_des.xml
(15) Views.sif
(16) Views_des.xml



Dnb4	Repository folder:
	(1) 11Workflows.sif
	(2) 11Workflows_des.xml
	Database folder:
	(1) 1-1HHPP_View.sif
	(2) 1-1HHPP_View _des.xml
Dnb5	Repository folder:
	(1) 1-1HHQ5_Responsibility.xml
	(2) 1-1HHQ5_Responsibility_des.xml
	(3) 1-24NF_Symbolic_URL.xml
	(4) 1-24NF_Symbolic_URL_des.xml
	(5) 1-28T6P_EAI_Data_Map.xml
	(6) 1-28T6P_EAI_Data_Map_des.xml
	(7) 1-29QAD_Web_ServiceInbound.xml
	(8) 1-29QAD_Web_ServiceInbound_des.xml

Using Rest of World

Rest of World, or ROW, refers to social media applications and news feeds about the companies you are interested in. These applications interact with your CRM and D&B360 to provide useful information related to D&B360 data. D&B360 ROW applications display as follows:

🔶 Favorites 🛕 Alerts 📾 News 🌌 Finance 💱 Map 🐱 YouTube 🔝 Blogs 🖬 Facebook 💽 Twitter in LinkedIn 💽 Sky	🐈 Favorites	🛕 Alerts	💼 News	Finance	🚰 Map	🐞 YouTube	🔊 Blogs	Facebook	🔁 Twitter	in LinkedIn	🕒 Skype
--	-------------	----------	--------	---------	-------	-----------	---------	----------	-----------	-------------	---------

By linking to ROW applications in D&B360, you can get a fully aggregated information view of your customers from several social and news media sources – all within your CRM application.



Rest of World Applications

D&B360 currently supports the social and news media applications listed in the following table. From a D&B360 Account page, click **D&B360 ROW** to display the ROW tabs. To navigate through the ROW applications, click the tabs.

ROW Icons	Description
🔶 Favorites	Allows you to save items of interest to you and stores them in this tab.
	To add an item as a favorite, such as a news story, click the Star icon. When you see your cursor pointer change into a little hand, click Mark as a Favorite .
Alerts	Allows you to track news so you can create customized alerts targeted to your specific areas of interest. These e-mail alerts include relevant news articles, press releases, company Web site updates, and blog posts, and are delivered overnight to your email in-box. Use alerts to stay up-to-date about the most recent company news, reach out to prospects or customers, create sales opportunities, and follow events of both public and private companies. For more information, see "Setting Alerts" on page 2-10
🖮 News	Displays aggregated headlines from many of the world's news sources. In D&B360, the News tab displays overall news about the account name with links to related articles. To open an article, click its link.
Finance	Displays stock feeds and financial news feeds about a company from a variety of sources.
🚰 Мар	The Map icon pre-populates the Account Billing address and connects to Google Maps to show the address location.
ᡖ YouTube	YouTube is a video-sharing website where users can upload, share, and view videos. A list of YouTube videos displays from companies in your D&B360 accounts. Only company-authorized videos display.
Blogs	Blogs display a list of authorized blogs from companies in your D&B360 accounts.



Facebook	Facebook is a social utility that facilitates communication. Only company authorized Facebook pages display for each company. To view Facebook information about people and companies from within D&B360, you need to have a Facebook account.A Facebook window opens to the account page you are currently viewing if it exists in the database. To view the company Facebook information, if you are not already logged in to Facebook, log in to your Facebook account.
E Twitter	Twitter operates a free digital service site that blends social networking with the ability to post short messages (or micro-blogs) limited to 140 characters or less, commonly known by users as Tweets. The Twitter service is designed for use on personal computers and through mobile devices such as smart phones. Tweets are published on a poster's personal web page, and can be restricted to select viewers, or viewed by anyone. In D&B360, when you click the Twitter tab, a list of that company's official tweets displays.
in LinkedIn	LinkedIn is a business-oriented social networking site where you can connect with trusted contacts and exchange knowledge, ideas, and opportunities. If you are not already logged in to LinkedIn, you will need to log in when it opens in a browser window. If the account you are viewing is in the database, a LinkedIn window for that company opens. If that company is not found, a LinkedIn search window opens with that company name pre- populated. Or you can use the LinkedIn search window to define your search.
S Skype	Click to make voice calls over the Internet. If you have Skype installed in on your computer, you can use the Skype icon listed next to phone number to make a Skype call. If phone numbers for companies, contacts, or leads/opportunities are in your D&B360 account information, you can make Skype calls to them.

Setting Alerts

- 1. When you click the **Alerts** tab for the first time, in the **eMail Address** field that displays, type the email address where you want your alerts digest email to be sent.
- 2. Click Subscribe.



📩 Favorites	🔺 Alerts	🏐 News	Finance	🞦 Map	😸 YouTube	🔝 Blogs	Facebook	C Twitte
				F	iter by Keyword			
You are	currently no	t an alert sut	bscriber. Pleas	e provide yo	ur email addres	s below, and	press the subscr	ibe button.
You are eMail Ad	currently no	t an alert sut	bscriber. Pleas	e provide yo	vur email addres	s below, and	press the subscr	ibe buffon.

- 3. Click Alerts.
- 4. Select which type of alerts you are interested in, or click Select All.
- 5. Click Monitor.

Please select the types of alerts you are interested in	ı.
Restructure	Regulation or Litigation
Reduction	Awards
Bankruptcy	Earnings Release
Executive Activity	Executive Announcement
Executive Quote	Expansion
Financial News	Funding
Management Change	Merger and Acquisition
New Alliance	New Product
Wins	
Select All	
Monitor Click Monitor.	







Chapter 3: Preparing Deployment Packages

Copying Folders from the Zipped File	3-1
Creating Descriptor Files	3-2
Moving Packages to the Default Package Directory	3-5

Copying Folders from the Zipped File

1. In your C:\ directory, create a new folder and name it export.

Name A	Size	Туре	Date Modified	Attributes
ADES		File Folder	08/12/2010 02:00 p	
Documents and Settings		File Folder	06/12/2010 04:28 p	
e062c67d47242435cd		File Folder	06/12/2010 06:19 p	
Inetpub		File Folder	08/12/2010 02:00 p	
Perl		File Folder	08/12/2010 04:55 p	
Program Files		File Folder	08/12/2010 05:31 p	R
🚞 sba81		File Folder	08/12/2010 01:49 p	
shared		File Folder	08/12/2010 05:38 p	
Siebel		File Folder	08/12/2010 02:57 p	
a siebfile		File Folder	08/12/2010 12:53 p	
tomcat		File Folder	08/12/2010 04:34 p	
pload		File Folder	09/12/2010 09:50 a	
WINDOW5		File Folder	08/12/2010 04:43 p	
duqmw		File Folder	06/12/2010 10:21 p	
export		File Folder	09/12/2010 10:02 a	



2. From the zipped file you downloaded (see "File Contents" on page 2-4), copy the DnB1, DnB2, DnB3, DnB4 and DnB5 folders to your C:\export directory.

Eile Edit Yiev	Favorite	es <u>T</u> ools <u>H</u> elp			4
3 Back 🔹 🕤 🕚	- 🌮 🔎	Search 🜔 Folders	😼 🔊 🗙 🍤	3-	
Address 🛅 C:\e:	port				💌 🔁 G
Name 🔶	Size	Туре	Date Modified	Attributes	
🚞 SSA		File Folder	5/25/2011 2:30 PM		
💁 1-FIW.ini	1 KB	Configuration Settings	5/25/2011 2:24 PM	A	
DnBS		File Folder	7/14/2011 10:14 AM		
DnB1		File Folder	7/14/2011 10:14 AM		
DnB2		File Folder	7/14/2011 10:14 AM		
DnB3		File Folder	7/14/2011 10:14 AM		
DnB4		File Folder	7/14/2011 10:14 AM		

Creating Descriptor Files

- 1. In your Windows Start menu command prompt, type cmd.
- 2. In the **Run** window **Open** field, to change the directory to the management server directory, type C:\sba81\siebsrvr\mgmtsrvr, then click **OK**.

🖅 Run	×
	Type the name of a program, folder, document, or Internet resource, and Windows will open it for you.
Open:	C:\sba81\siebsrvr\mgmtsvr
	OK Cancel <u>B</u> rowse

Note: Your directory path might be different depending on your Siebel Installation.



Your command window might look like this:



- 4. Return to the command prompt and type the following commands:
 - admpkgr generate C:\export\DnB1
 - admpkgr generate C:\export\DnB2
 - admpkgr generate C:\export\DnB3
 - admpkgr generate C:\export\DnB4
 - admpkgr generate C:\export\DnB5



These commands create the package descriptor files, which are a manifest of the customizations in the packages. After you execute these commands, they should complete with 0 errors and 0 warnings.

🖾 Command Prompt
C:\sba81\mgmtsfir>admpkgr generate C:\export\DnB1 Current Time is :10:10:49:692
INFO: Program called with these options: Package Name = 'DnB1' ,Package Location = 'C:\export' , Ignore errors = 'Y'
INFO: Tackage descriptor rile (descriptor.xml' was created in 'C:\export\DnB1' w it 0 error(s) and 0 warning(s)
INFO: Curent Time is :10:17:49:243 Current Time is :10:17:49:243
C:\sba81\mgmtsrvr}admpkgr generate C:\export\DnB2 Current Time is :10:17:52:759
INFO: Program called with these options: Package Name = 'DnB2' ,Package Location = 'C:\export' , Ignore errors = 'Y'
INFO: Package descriptor file 'descriptor.xml' was created in 'C:\export\DnB2' w ith 0 error(s) and 0 warning(s).
INFO: Curent Time is :10:17:53:197 Current Time is :10:17:53:197
C:\sba81\mgmtsrvr>admpkgr generate C:\export\DnB3 Current Time is :10:17:54:728
INFO: Program called with these options: Package Name = 'DnB3' ,Package Location = 'C:\export' , Ignore errors = 'Y'
INFO: Package descriptor file 'descriptor.xml' was created in 'C:\export\DnB3' w ith 0 error(s) and 0 warning(s).
INFO: Curent Time is :10:17:55:243 Current Time is :10:17:55:243
C:\sba81\mgmtsrvr}admpkgr generate C:\export\DnB4 Current Time is :10:17:56:415
INFO: Program called with these options: Package Name = 'DnB4' ,Package Location = 'C:\export' , Ignore errors = 'Y'
INFO: Package descriptor file 'descriptor.xml' was created in 'C:\export\DnB4' w ith 0 error(s) and 0 warning(s).
INFO: Curent Time is :10:17:56:884 Current Time is :10:17:56:884
C:\sba81\mgmtsrvr>admpkgr generate C:\export\DnB5 Current Time is :10:17:58:509



Moving Packages to the Default Package Directory

Before your packages are ready for deployment, you need to move them to the default package directory.

• From your C: \export directory, copy the following directories to

C:\sba81\siebsrvr\mgmtsrvr\adm\packages.

- DnB1
- DnB2
- DnB3
- DnB4
- DnB5

Your path might be different depending on your Siebel Installation.

Ele Edit View	Favorites I	ools <u>H</u> elp			<u></u>
🔾 Back 🝷 🕥 🕚	🤌 🔎 Searc	th 🜔 Folders	🛛 😼 💓 🗙 🍤 🖽 🖬		
Address 🛅 C:\sb	a81\mgmtsrvr\ad	m\packages			💌 🔁 Go
Name	Size T	уре	Date Modified	Attributes	
empty	F	ile Folder	5/24/2011 11:37 AM		
🚞 sample	F	ile Folder	5/24/2011 11:37 AM		
SSA	F	ile Folder	5/25/2011 3:11 PM		
DnB1	F	ile Folder	7/14/2011 10:22 AM		
EnB2	F	ile Folder	7/14/2011 10:22 AM		
EmB3	F	ile Folder	7/14/2011 10:22 AM		
EDnB4	F	ile Folder	7/14/2011 10:22 AM		
Dn85	F	ile Folder	7/14/2011 10:22 AM		







Chapter 4: Deploying D&B Packages

Initiating Package Deployment for DnB1, DnB2, and DnB3	4-1
Locating and Validating the Enterprise Server	
Processing DnB1, DnB2, DnB3 Packages	4-4
Compiling the Application	4-6
Processing the DnB4 and DnB5 Packages	4-9
Applying Table Changes	4-11
Adding the D&B360 Window to the Application	4-12

Initiating Package Deployment for DnB1, DnB2, and DnB3

You must configure a command prompt path that includes the management server's executables directories. An alternative is to edit the global PATH environment variable, but this would affect all command prompts.

- 1. If you closed the command window, in your Windows Start menu, type run.
- 2. At the command prompt, type cmd.
- 3. To add the management server's bin directory to the PATH environment variable, type this command:

```
set PATH=C:\sba81\siebsrvr\mgmtsrvr\bin;%PATH%
```

Note: Your directory path might be different depending on your Siebel Installation.





4. To change to the management server directory, type **cd** C:\sba81\siebsrvr\mgmtsrvr.

Locating and Validating the Enterprise Server

To locate the Enterprise Server, complete the steps in the section that immediately follows. If you do not need these instructions, skip to the see "Validating the Enterprise Profile File" on page 4-4.

Locating the Enterprise Server

1. To search for Administration - Server Management, click the site map icon.



2. In the Web Services window, click Administration - Server Management.





3. In the Enterprise Server window, Administration - Server Management area, click Enterprises.



The Enterprise Servers window opens. In our example, the Siebel enterprise server is named OUEnt7.

File	▼ Edit ▼ Viev	N	👻 Naviga	te 🔽	Query		▼ Tools	
s 🔠 Contacts 惧 O	pportunities [0&B360 🦼 Sale	s Orders 🛛 🤱	Service	Quotes	Administ	ration - F 🚺 🗋]
Show: Enterprises -	- 🙂 🍏 🖌	ት 💆 📇 🕒	Reports		- Saved	d Queries:		•
Enterprise Server:								
Enterprise Servers	Menu	-				1	- 1 of 1 📐	1
Enterprise Se	rver		Descrip	tion				
> OUEnt7			Siebel E	nterprise Sen	ver			
Servers								
Menu 🔻	Query	Startup Shutdow	wn			1 -	1 of 1 📄	
State	Siebel Server	Server Group Na	me State	PID Host	Name S	Start Time	End	Time
>	OUSrvr7		Running	3120 usdn	baws009 9	/3/2012 09:	25:34 AM	



Validating the Enterprise Profile File

In the command line, type the following command:

deploy OUEnt valent SADMIN SADMIN

where:

This	IS
Your CRM Enterprise Server	QUEnt
Your User Name	1st SADMIN
Your Password	2nd SADMIN

Note: If you have another CRM Enterprise Server Name, you can change QUEnt to your enterprise name.

SADMIN is the default user administrator for Siebel, but you can change this name. Any user name you replace with must have the SSE role.

This validation should succeed without errors.

Processing DnB1, DnB2, DnB3 Packages

Complete the steps in this section for each of the first 3 packages – DnB1, DnB2, and DnB3 – one at a time. In the following illustration, the steps in darker blue are mandatory. The steps in lighter blue are optional but highly recommended because a data integrity link is associated with them.





For these steps, we use *QUEnt* as the CRM enterprise server name and *SADMIN* as the user name and password. When you complete these steps, substitute any revised names you used (see "Locating and Validating the Enterprise Server" on page 4-2).

1. To load package references and verify the load, in the command line, type this command: this is the step based on paragraph style that Lori helped me set up.

deploy_OUEnt load SADMIN SADMIN DnB1

After a few seconds, a message displays to inform you that this command executed successfully.

2. To create a deployment session for your package and check the status of the session, type this command:

deploy_OUEnt create SADMIN SADMIN DnB1

This command creates a deployment record in the database in preparation for the data migration.

After a few seconds, a message displays to inform you that this command executed successfully.

Note: The next two steps are optional. However, it is strongly recommended that you complete these steps before deploying your package.

3. (Optional): To validate the target enterprise, type this command:

deploy_OUEnt validate SADMIN SADMIN DnB1

This process takes about two minutes. Although this step is optional, it is strongly recommended, as it verifies schema versions and that the target agents are online. Verify that the validation succeeds.



4. (Optional): To back up data that will be affected, type this command:

deploy_OUEnt backup SADMIN SADMIN DnB1

Note: Although this backup should run automatically when you enter the copy command, doing it here ensures that the backup exists and decreases the time required for the copy command.

5. To deploy the customizations to the target enterprise, type this command:

deploy_OUEnt copy SADMIN SADMIN DnB1

After a few minutes, a message displays to inform you that this command executed successfully.

- 6. For the DnB2 package, repeat each of the steps starting with step 1.
- 7. For the DnB3 package, repeat each of the steps starting with step 1..

(!) Important Note: Before continuing with the installation, you MUST do a FULL Compile to activate the new changes. If you skip these steps, the installation will generate errors.

Compiling the Application

- 1. From the Siebel menu, click Tools -> Compile Projects.
- 2. In the Object Compiler window, select All projects, then click Browse.



3. In the Save As window, select the directory path of your Siebel Server Installation, then click Save.



Save in	ENU		• E 💣 📰	•
My Recent Documents	siebel.srf			
Desktop				
y Documents				
y Documents				
y Documents	File <u>pame</u> :	siebel_sia_new.stf		Save

4. In the **Object Compiler** window, click **Compile**.

Decision				
Projects				Compile
ABU Bulk Request				Cancel
AC Task				
Access Control				Reference SF
Access Group				
Account (SCW)				
Account (SSE)				
Account (SSV)				
C Selected projects	All projects	C Locked pro	jects	
iebel repository file:		E	rowse	
Auto-start web client				
1				

5. When the process has completed, go to your computer **Start** menu, type **Run**, then type **services.msc**.



	Services				_	
	<u>File Action ⊻iew</u>	Help				
	← → 💽 😭 [3 🗟 😭 🖬 🕨 🔳 💷 🖦				
	Services (Local)	🍇 Services (Local)				
		Siebel Gateway Name Server	Name A	Description	Status	
		and any approximation of the second second second	Shell Hardware Det	Provides n	Started	
		Stop the service	Siebel Gateway Na	Siebel Gate	Started	
		Restart the service	Siebel Management	Siebel Man	Started	
			🖏 Siebel Management	Siebel Man	Started	
		Description:	Siebel QuickStart S			
		Service to mapage enterprise	Siebel Server [OUE		Started	
lun		Service to manage encerprise	hart Card	Manages a		
			becial Administrati	Allows adm		
			QL Server (MSSQL	Provides st	Started	
-	Type the name of a	program, folder, document, or	QL Server Active	Enables int		
	Internet resource,	and Windows will open it for you.	QL Server Agent (Executes j	Started	
			QL Server Browser	Provides S		
Open	corvices mes		QL Server FullTex	Quickly cre	Started	
Oberr.	Senvicesmise		L Server VSS Wri	Provides th	Started	
			stem Event Notifi	Monitors s	Started	
			sel Cahadular	Earthly	Charlad	
		Creat L Creater				
	OK	Cancel Browse				
					1	

- 6. In this order, stop all of the Siebel services:
 - a. Siebel Management Agent
 - b. Siebel Management Server
 - c. Siebel Server
 - d. Siebel Gateway Name Server
- 7. Open a Windows Explorer window and navigate to:
 - C:\sba81\siebsrvr\OBJECTS\ENU\
- 8. To replace the $\verb"siebel_sia_srf"$ file with the new versions, rename both fields as follows:
 - a. Rename $siebel_sia.srf-to-siebel_sia_old.srf$
 - b. Rename $siebel_sia_new.srf to siebel_sia_old.srf$
- 9. Return to the Services window and in this order, start the Siebel services:



- a. Siebel Management Agent
- b. Siebel Management Server
- c. Siebel Server
- d. Siebel Gateway Name Server

Processing the DnB4 and DnB5 Packages

Note: Before you start this section, make sure your repository compiled successfully. For more information, see "Compiling the Application" on page 4-6.

Complete the steps in this section to each of the last 2 packages – DnB4 and DnB5 – one at a time. In the following illustration, the steps in darker blue are mandatory. The steps in lighter blue are optional but highly recommended because a data integrity link is associated with them.



For these steps, we use *QUEnt* as the CRM enterprise server name and *SADMIN* as the user name and password. When you complete these steps, substitute any revised names you used (see "Locating and Validating the Enterprise Server" on page 4-2).

1. To load package references and verify the load, in the command line, type this command:

deploy_OUEnt load SADMIN SADMIN DnB4

After a few seconds, a message displays to inform you that this command executed successfully.


2. To create a deployment session for your package and check the status of the session, type this command:

deploy_OUEnt create SADMIN SADMIN DnB4

This creates a deployment record in the database in preparation for the data migration.

After a few seconds, a message displays to inform you that this command executed successfully.

Note: The next two steps are optional. However, it is strongly recommended that you complete these steps before deploying your package.

3. (Optional): To validate the target enterprise, type this command:

deploy_OUEnt validate SADMIN SADMIN DnB4

This process runs for about two minutes. Although this step is optional, it is strongly recommended, as it verifies schema versions and that the target agents are online. Verify that the validation succeeds.

4. (Optional): To back up data that will be affected, type this command:

deploy_OUEnt backup SADMIN SADMIN DnB4

Note: Although this backup should run automatically when you enter the copy command, doing it here will ensure that the backup exists and decrease the time required for the copy command.

5. To deploy the customizations to the target enterprise, type this command:

deploy OUEnt copy SADMIN SADMIN DnB4

After a few seconds, a message displays to inform you that this command executed successfully.

6. To activate the database WorkFlows and Applets, type this command:

deploy_OUEnt activate SADMIN SADMIN DnB4

After a few seconds, a message displays to inform you that this command executed successfully.

- 7. For the DnB5 package, repeat each of these steps starting with step 1.
- 8. When you have completed each package, run a full compile to activate the new changes.

(!) Important Note: Before continuing with the installation, you MUST do a FULL Compile to activate the new changes. If you skip these steps, the installation will generate errors.



Applying Table Changes

- 1. In the Seibel Tools Siebel Repository window, Siebel Objects area, select Table.
- 2. In the Name column, select the first table that starts with the letters CX.
- 3. In the Change Option window, click Apply and then OK.





4. In the **Apply Schema** window, **Database user** and **Database user password** fields, type your user ID and password, and then click **Apply**.

Siebel Loois - Siebel Repository - LTable	Apply Schema		_	
Ble Edit Yew Screens Go Query	₽ Iables			- 0
	Current Bow			
сБ.	Table mane			
a da 121 mi	Land Thana			
Object Europerer B. V		Trational		
Project Explorer + A	/ 16k table space:	Table List		
Typet David Elia	20% Julie server	Articula		
C C Sinhel Objects	jen rabe space.	Channel	Designed	1000
Applet		Changed	Project	Use
E Application	Index space:		Line Company	~
E 🚯 Business Component		5	Paß Campuny	~
🕑 🎲 Business Object			DeB Company	~
🗈 💑 Business Service	Storage control file:		DeB Contraty	~
- S EIM Interface Table			DeB Contact	CY.
Entity Relationship Diagram		2	Dell Contact	a
E A Integration Object	Database yser:	2	DoB Company	CX
- Ay Link	Press Aug		FIM Homitality	FIM
IN Price List	XXXX		EIM Common SIA	EIM
E Screen	Database user password		EIM Common SIA	EIM
+ Con Table			EIM Organization	EIM
E-F Task			EIM Organization	EIM
E S View	ODBC data source		EIM Common SIA	EIM
B 🔄 Web Page	CCD data & subsect		EIM Promotion	EIM
🕑 🚮 Web Template	220. derank lutrance		EIM Promotion	EIM
E Se Workflow Process	DDL file		EIM Common SIA	EIM
	Route		EIM Organization	EIM
			EIM Organization	EIM
	Warning: data changes made to new tables or columns will not be propagated to		EIM Organization	EIM
	the client. Updating the client schema will not propagate this data. Test the server schema, but don't make substantial data changes until the client schema has been updated.		EIM Organization	EDM.
	Apply Cancel			-

5. For all tables that start with CX, repeat these steps.

Adding the D&B360 Window to the Application

- 1. In the Siebel Tools Siebel Repository window, Object Explorer, Siebel Objects area, select Application.
- 2. In the Applications window, **Name** column, select the application for your environment. In this example, where Siebel Call Center is being used, Siebel Universal Agent is selected.
- 3. Right-click the application and click Lock Object.



🐇 Siebel Tools - Siebel Re	pository - [App	lications]			-	
Ele Edit View Screen	ns Go Query	Debug Tools Window	Help		-	8
				a la ta Ra I I	ERINE	
	10 0 01			Arrest Array and a set of the		
	868	10 dia 123 litil 123 tot 1	에헤헤움고	12 12 2 00 图	(S) 2 (m m)	*
Object Explorer	9 × 🗖	Application List				4 Þ
Project ** All Projects**	-		Applicatio	ns		
Types Detail Flat		Mi Mara	Churrent	Derted	11	
Cal Sishel Objects		W Name	Changed	Project	Menu	
Sieber Objects		Stebel Service		Siebel Service Enterpr	Generic WEB	-
Annipation		Siebel Service Wireless		SWLS Service	Generic Generic	
KEL Passion		Siebel Service for CE		SHCE Service	ServiceCE Generic	
Screen Mers	altern 2	Siebel Toolt		Siebel Local	Generic	-
🖲 🚯 Business Compor	nent	Siebel Universal Agent		Siebel Universal Agent	Generic WEB	-
Business Object		Siebel eApparel & Pootwear		CS Siebel Consumer C	Generic WEB	_
the de puiser carrie		Siebel eBanking		FINS eBanking - Appl	Generic	
	Siebel eBar Siebel eCh Siebel eCh	Copy Record	FII Sie CS			
	Siebel eCh	Columns Displayed	CS			
	Siebel eCh	Sort Order	CU			
	Siebel eCo	Sarraran	eCi		/	
	Siebel eCo	Compile Selected Objects	LS	/		
	Siebel eCu	Edit Server Scripts	eO			
	Siebel eCu	Edit Browser Scripts	CU			
	Siebel eDe	en genne se po	eA/			
	Siebel eEv+	Compare Objects	eEv	/		
	Siebel eMa	View Web Hierarchy	eM			
	Siebel eMa	new <u>m</u> eet net di city	eM			
	Siebel ePh-	Add to Archive	HH			
	Siebel ePrc	Add to Hot-Fix	15			
	Siebel eRet	¥alidate	CS			
	Siebel eSal	charles (3) and	eSi			
	Siebel e	Lock Object	CU			

- 4. With the application still selected, in the **Object Explorer** area, select **Application**, and then **Page Tab**.
- 5. In the Page Tab List area, right-click any of the records and select New Record.



	QQK★★★ M [1]	21 X1 V . · 1 16 16 호 12	• • * * * . 12 12 2 00	元日、 ② 限合调←→
Object Explorer 🕴 🕴	Page Tab List			
Project: *** All Projects **		Applicatio	ns	
Types Detail Flat	W Name	Changed	Project	Menu
🖃 📝 Siebel Objects	Siebel Service Wireless		SWLS Service	Generic
Applet	Siebel Service for CE		SHCE Service	ServiceCE Generic
E Confection	Siebel Tools		Siebel Tools	Generic
Page Tab	Siebel Universal Agent	~	Siebel Universal A	gen1 Generic WEB
Business Component Business Object				
🕑 💩 Business Service	\	Page Tab	IS	
EIM Interface Table	W Secon	đ	anged Sequence	Text
P Entity Relationship Diagram	Accounts Screen]	2	Accounts
1 Integration Ubject	Content Streen		3	Contacts
		Pa	ge Tabs	
	W Screen)	Changed :	Sequence
	>			2
	New Record			3
	Delete Deserve			

- 6. Populate the New Record with the following values:
 - Screen: DnB Screen
 - Text String Override: D&B360
- 7. In the **Sequence** field, type a number not used in the list.

Because this value determines the tab order in the user interface, make sure each record has a unique value.

	Page Tabs								
	W	Screen	Changed	Sequence	Text	Text - String Reference	Text - String O	Inactive	Comments
	1	Accounts Screen		2	Accounts	SBL_ACCOUNTS-1004224419-01			
	1	Contacts Screen		3	Contacts	SBL_CONTACTS-1004224924-40			
>	1	DnB Screen	1	5	D&B360		D8:B360		
	1	ISS Unified Administration Screen	1	9	Administration - Product	SBL_ADMINISTRATIONPROI			ISS Administration
	1	Opportunities Screen	1	4	Opportunities	SBL_OPPORTUNITIES-10042250			
	1	Oustar Carson	1	0	Ouster	CBL OLIOTEC-1004225057-4711			

8. Run a full compile.





Chapter 5: Generating the Org ID

Completing the Installation Setup	5-1
Activating the Installation	5-2
Completing the D&B360 Registration	5-4

Completing the Installation Setup

1. To open the **Installation Setup** window, open a browser window and enter this URL in the address line (or click it here):

https://dnb360.dnb.com/siebel/Installation/DnBSiebelInstaller.aspx

- 2. In the Welcome to the Siebel/D&B360 Installation window, fill in this information:
 - a. Siebel Server Web Service URL
 - b. Siebel Server User
 - c. Siebel Server Password
 - d. Use Secure Web Services (WS-Security UserName Token Profile click to select.



3. Click Generate.

DSB Installation Setup
Welcome to the Siebel/D&B360 Installation
Your Siebel installation it's almost completed. Provide the following information :
Siebel Server Web Service URL (e.g: "http://server/eai_anon_enu"):
Siebel Server User:
Siebel Server Password:
Use Secure Web Services (WS-Security UserName Token Profile)
Click the "Generate" button to create your new ORGID Click Generate.

A message displays to inform you that Siebel D&B has been installed on your CRM.

Activating the Installation

- 1. From the D&B360 menu, click About D&B360.
- 2. In the **D&B Licensing** area, click **Configure**.



3. In the D&B Administration Wizard window, click Begin.



D&B Admin	istration Wizard
D&B Administration W	fizard
If this is your first install, Trial should start today: service will continue acc	the Trial term will begin when you complete this configuration. Select Begin to indicate that your Select Cancel to end configuration and begin your trial at a later date. If this is not you first instal cording to your initial Trial term. Select Begin to continue configuration or Cancel to end.
	Click Begin Cancel

Note: Trial customers—Your 60-day trial period begins at the point of installation, as noted in the trial terms. If you are not yet ready to configure D&B360,we recommend that you click **Cancel** and configure your software when you are ready to start using it. This will allow you to take full advantage of your trial period.

4. In the D&B360 Terms & Conditions window, click to select the Terms of Agreement, then click Next.

D&B 360 Terms & Conditions	
Trial Terms and Conditions for D&B 360	^
Trial Terms and Conditions (the "Agreement")	
PLEASE READ THE FOLLOWING TERMS AND CONDITIONS BEFORE CONTINUING. BY CONTINUING, YOU AGREE TO THE TERMS AND CONDITIONS SET OUT B IF YOU HAVE ENTERED INTO A SEPARATE ORDER WITH D&B FOR THE D&B360 SERVICE, THEN THESE TRIAL TERMS AND CONDITIONS DO NOT APPLY.	ELOW
Pursuant to the free trial (the "Trial") for which you have registered, Dun & Bradstreet, Inc. ("D&B") shall make available to you, the customer ("Customer") business information ("Information") and services (the Information and services together, the "Services"). The following terms and conditions shall apply to Customer's use of the Services, provided that if Customer has a currently effective master agreement with D&B, the conflicting and additional terms and conditions of such master agreement shall control.	
1. User Acknowledgment You agree that, when prompted during this registration, you will accurately select or identify your company as the Customer who will be receiving the Services, that you are an authorized representative of Customer, and that Customer is an existing and operating business. You agree not to register in this Trial more than one time for Customer, or for more than one company. You agree that this Trial allows Customer to evaluate the Services for use in the sales and marketing functions of Customer's business, and does not permit Customer to perform searches, create lists, extract Information or otherwise use the Services at a volume inconsistent with the ordinary performance of Customer's sales and marketing functions.	
2. License DBB grants to Customer a non-exclusive, non-transferable license ("License") to use the Services subject to the limitations contained in this Agreement. Customer may use the Services during the term of the Trial only. Customer may use the Services for internal use only, specifically for sales and marketing purposes, including lead generation, mailing lists, segmentation analysis, sales channel management, campaign management, sales force automation and customer acquisition and order entry. The Services may only be accessed by Customer's employees who currently have an account with the CRM. The Services may only be accessed through the CRM, and may not be exported, copied, transferred or otherwise used or accessed outside of the CRM. Customer will not provide any Information or access to the Services to third parties. The Services may be accessed by Customer shall not share Canada, based upon the country in which the Customer is based, to support its business in such country. Customer shall not share its user IDs and passwords outside such country, nor may it share Information with persons located outside such country. Customer will not use any Information as a factor in establishing an individual's eligibility for (i) credit or insurance to be used primarily for personal, family, or household purposes, or (ii) employment. In addition, Customer will not use any Information to engage in any unfair or deceptive practices and will use the Information only in compliance with applicable state, local, federal or foreign laws or regulations, including but not limited to laws and regulations promulgated by the Office of Foreign Asset Control, applicable export restrictions, and/or these laws and regulations remarketion, outcomer solicitation (including fay and/or eumail)	
Click Next	





Completing the D&B360 Registration

- 1. In the D&B Install Key window, License Information area:
 - a. In the Install Key field, type the install key that you were provided in the confirmation email.
 - b. In the other fields, type your information and select your country.
- 2. In the Siebel Account Information area, type your information, then click Next.

D&B Install Key			
License Information			
Install Key			
Company Name	Country	•	
First Name			
Last Name			
Siebel Account Information			
Siebel Server Web Service URL (e.g: "http://server/eai_anon_enu"):			
Username			
Password			Confirm Password
Siebel Application URL (only for internal use e.g: " <u>http://server/callcenter_enu</u> "): Use Secure Web Services (WS-Security UserName Token Profile)	V		
Source			
	Who provided you this package? D&B		
	Cancel Next		

A window displays a message to confirm that you have successfully finished the setup of D&B360 for Siebel CRM.

3. Click Finish.





Chapter 6: Installing and Configuring the Informatica Cloud Secure Agent

This chapter applies only if your account includes batch processing. If it does not, go to this chapter: **Establishing Permissions for Roles Within D&B360**.

Preparing for Administration of Batch Jobs	6-1
Installing the Informatica Cloud Secure Agent	6-3
Configuring Connectivity Between the Informatica Cloud Secure Agent and the Siebel Database OBDC	6-6
Creating the OBDC Data Source for Windows Platforms	6-7

Preparing for Administration of Batch Jobs

If your account includes batch processing, before you can schedule and run batches, you need to install and configure the Informatica Cloud Secure Agent. For information about see "Managing Batches" on page 1.

The first time you open the Siebel CRM application, the system creates and displays an Informatica account, allowing you to download the secure agent.

1. In the D&B360 Administration window, Batch Processing Setup area, click Batch Setup.

Duplicate D-U-N-S Identification	Recertified D-U-N-S Report	
Batch Processing Setup Click Batch Processing	atch Setup.	
Batch Setup Admin Review	List	
D&B Callout Logs		
Call Out Logo		



The Batch Setup window includes three areas: User Credentials, New Batch Schedule, and Refresh Batch Schedule.

Batch Setup				
DAB Back to DSB Administration				
Dack to Dac Administration				
DSP260 batch susceptranizes data batwass Siskel and DSP. The bate	supplie the background to	make ourse you have access to the latest	DPR data at your finger tipe. So	asify askadula far susaina katak iaka
D&B360 batch synchronizes data between Siedel and D&B. The batch	runs in the background to	make sure you have access to the latest	Deb data at your ringer tips. Sp	ecity schedule for running batch jobs.
	w Batch Activity Logs	Refresh Batch Activity Logs	Admin Review List	
User Credentials				
		Username SADMIN		
		Change Credentials		
- New Batch Schedule				
New Batch Schedule				21
Start Time: 03/20/12 10:	20 PM 03/22/1	12 05:30 PM	Confidence	ce Code: 08 👻
Repeat Frequency: Daily	÷			
Refresh Batch Schedule				
Start Time: 03/20/12 08	15 PM			
Start Time: 00/2012 00.	03/22/	12 05:30 PM		
Repeat Frequency: Weekly	-		Repea	at Every: Thursday -
		Save Batch Settings		
		ouro outor ocurrigo		

Note: To schedule and run a batch, the credentials you use are your Siebel user name and password. If you want to allow another user the rights to run a batch, you can update that user's information in the Batch Setup User Credentials area.

2. To allow another user to run batch processing, in the User Credentials area, click Change Credentials.

User Credentials		
	Click Change	Username SADMIN
	Credentials.	Change Credentials

- 3. In the **D&B360 Update Informatica Connection Credentials** window, type the following information, and then click **Update**:
 - Username
 - Password
 - Confirm Password
 - Database
 - Schema
 - CodePage



D&B36) Update Informatica Connection Credentials
Back to D&B Batch Se	itup
Enter your new Sieb	el username and password to change credentials successfully
Username	
Password	
Confirm Password	
Database	
Schema	
CodePage	UTF-8 Click Update.

Installing the Informatica Cloud Secure Agent

You can install the Secure Agent on any computer that is running Linux or Windows and is inside the enterprise firewall. For more information, refer to the Informatica Cloud hardware requirements.

- 1. Open a browser window and enter this URL in the address line (or click it here): https://icosp2.informaticacloud.com/saas
- 2. Type your User Name and Password to log in to the Informatica Cloud application. If you do not have your log in information, contact D&B support.



formatica Cloud -	Windows Internet Explorer				
🕑 👻 🕛 htt	ps://icosp2.informaticacloud.com/saas	;/displayLogin.do	•	A Soogle	م
Favorites 88	🔹 🌈 Siebel Ca 🌈 Siebel Ca 통	D&B360 🖸 Bookshe	🛈 Infor 🗙	👌 🕶 🖾 🔹 🖶 🝷 Page 🕶	Safety 🕶 Tools 👻 🔞
	ch Cloud				
NFORMATIO	CACIOUU				
_					
User Name:	(Data	Synchronization	aren and filer
Password:			Includ	les add-on functionality such as custor	m sources and
	Login		- pilg i	The second s	
	Don't have an account?		Conta Valida	act Validation ate postal addresses, email addresses,	, and phone
	Forgot your password?		numb	ers in your CRM environment or a loc	al database.
Resources			Data	Assessment	
a with st			Measu Conta	ure and monitor data quality of the Lea act, and Opportunity objects within Sal	ad, Account, esforce CRM.
See What's	New in Informatica Cloud Winte	r 2012			
Check Syste	em Status at the Informatica Clo	ud Trust Site	Data	Replication	
Participate i	in the Informatica Cloud Commu	unity	Auton	nate the movement of data from cloud	and on-premise

3. Click the **Configuration** tab, and in the **Agents** area, click **Download Agent**.

Home	Data Services	Configurat	tion
Agents	Connections	Schedules	Task Flows
Agents			
List of all In	formatica Secure A	gents in your o	rganization An Informatic
List of all In database or Agents	formatica Secure A file located on you	gents in your or Ir network. The	rganization. An Informatic page automatically refrest

Note: Steps 4 to 7 apply to Windows users only.

- 4. In the installation wizard window, follow the instructions.
- 5. Select Windows Administrative Tools -> Services.
- 6. In the Services window, Services (Local) area, stop the Informatica Cloud Secure Agent service.



-	Services				N 🔍	
	File Action View	Help				
	🔶 🔿 🔝 🖛	🗼 🛛 📷 📄 🔹 🖬 🔢 🕪				
ľ	Services (Local)	Name	Description	Startup Type	Log On As	
		强 Informatica Cloud Secure Agent		Automatic	INFORMA	

- 7. In the Informatica Cloud Secure Agent Properties window, click the Log On tab
- 8. In the **Log On** tab, **This account** field, make sure the NT account belongs to Administrator group on your computer, and then type and confirm your password.

Informatica Cloud Secure Agent Properties (Local Computer)						
General Log On Recovery Dependencies						
Log on as:	Log on as:					
CLocal System accour	nt					
Allow service to in	nteract with desktop					
O This account:	DOMAIN\login	Browse				
Password:	Password:					
Confirm password:						
Help me configure user account log on options.						

9. In the Windows Services window, start the Informatica Cloud Secure Agent service.

🔍 Services					c
File Action View	Help				
	🗟 🛛 🖬 🕨 🔲 🖬 🕩				
🤹 Services (Local)	Name	Description	Status	Startup Type	Log On As
	GInformatica Cloud Secure Agent		Started	Automatic	Local Syste





Configuring Connectivity Between the Informatica Cloud Secure Agent and the Siebel Database OBDC

The Secure Agent connects to Siebel database through DataDirect CLOSED open database connectivity (ODBC) drivers, which are packaged with the Secure Agent.

1. Obtain Siebel Database connectivity details from the Siebel administrator.

Parameters depend on the database type. The User Name associated with the Database must have proper permissions to read and write from the Siebel table through an ODBC connection.

Type of Server	Required Parameters
SQL	Siebel Database Host Name (or IP address)
	Database Name
	User Name
	Password
	Schema Owner
	Port Number
Oracle	Siebel Database Host Name (or IP address)
	• SID
	Service Name
	User Name
	Password
	Port Number
IBM DB2	Siebel Database Host Name (or IP address)
	Database Name
	User Name
	Password
	Port Number

2. To store your Informatica Cloud Organization ID and Siebel database user name, configure the Batch job initialization file:

Informatica Cloud Secure Agent\main\rdtmDir\parameters\Dnb360_Initialize_ Siebel.txt.



- 3. Log in to Informatica Cloud.
- 4. Click the Administration tab, and then the Organization tab.

Your Organization ID displays in the Organization Properties area.

	ΑΤΙCΑ	Cloud			
Home	Data S	ervices	Configuration	n Administra	ation
Organizat	tion (Jser Groups	Users	Audit Log	
My Orga	nization				
You can v	iew your or	ganization p	rofile. It displays	s organization prop	perties and
Edit					
Organiza	tion Prope	erties			
Organizati	on ID:		Org15		

The Organization ID displays under Organization Properties.

ſ	Di	nb360_	Initialize_	Siebel.t	xt - Note	epad	
L	File	Edit	Format	View	Help		
	0rg1	5 ,IN	FORMAT:	ICA			

Creating the OBDC Data Source for Windows Platforms

Note: If you are running in a Linux environment, you must install the iODBC driver manager. For more information, refer to the Linux documentation for your version of Linux.

- 1. Log in to your computer as the Administrator.
- 2. From the Start menu, open the Administrative Tools window.
- 3. Click Data Sources (OBDC).
- 4. In the ODBC Data Source Administrator window, select the dBASE Files and click Add.



ODBC Da	ta Source Ad	ministrato	r		4 Sugara in	
User DSN	System DSN	File DSN	Drivers	Tracing	Connection	Pooling About
User Data	Sources:					
Name		Driver				Add
dBASE F	iles	Microsoft	Access d	BASE Driv	ver (*.dbf, *.n	Remove
Excel File	es	Microsoft	Excel Dri	ver (* xls, *	*xlsx, *xlsm,	Hemove
MS Acce	ess Database	Microsoft	Access [Driver (*.mo	db, *.accdb)	Configure
Visio Dat	abase Samples	s Microsoft	Access [Driver (*.mo	lb, *.accdb)	
•		ш			4	
	An ODBC Use the indicated and can only I	er data sour data provide be used on	ce stores er. A Use the currer	informatior er data sou nt machine	n about how to irce is only vis	o connect to ible to you,

-OR-

If you are on a Windows 64-bit platform, click **Start** -> **Run** and run the following executable file: %windir%\SysWOW64\odbcad32.exe. For more information, refer to http://support.microsoft.com/kb/942976.

🖅 Run	23
s 💷	Type the name of a program, folder, document, or Internet resource, and Windows will open it for you.
Open:	%windir%\SysWOW64\odbcad32.exe 👻
	This task will be created with administrative privileges.
	OK Cancel Browse



- 5. To connect to the Siebel database, in the **Create New Data Source** window, depending on your platform, select either one of these DataDirect CLOSED Wire Protocol for Informatica drivers:, and then click **Finish**.
 - DB2
 - Oracle
 - SQL Server

Create New Data Source	×
	Select a driver for which you want to set up a data source.
	Click Finish. < Back Finish Cancel

- 6. To complete the data source configuration, In the OBDC Data Source Administrator window, click the System DSN tab
- 7. Select System Data Source name DNB360_Siebel_32, and then click Add.

ODBC Data Source	Administrator	_	×	
User DSN System D	SN File DSN Drivers	Tracing Connection	n Pooling About	
System Data Sources:				
Name	Driver	Cilck Add.	Add	
DNB360_Siebel_32	DataDirect CLOSED	5.2 SQL Server Wire	Remove	
			Configure	

8. In the ODBC SQL Server Wire Protocol Driver Setup window, click Test Connect.



General Advanced	About	\$
Data Source Name:	DNB360_Siebel_32	Help
Description:]
Server Name:	<server_name></server_name>]
Database Name:	siebeldb]

- 9. For more information about the Informatica Cloud, click Help.
- 10. Click Apply, and then click OK.





Chapter 7: Establishing Permissions for Roles Within D&B360

You can specify whether application-specific features such as buttons, links, and check boxes can be turned on or off for specific roles by enabling or disabling features in the user interface windows .

Setting Permissions for Users

- 1. From the main menu, select the **D&B360** tab.
- 2. In the Show area, select D&B360 Administration.



Note: After you have completed setting the following features, click Save.

3. In the **D&B360 Administration** window, **Button Configuration** area, click the tab whose features you want to set.

These menu items will display on the user interface

	More Info	D&B3	60 D&B360 Ro	w D&B Cr	edit Account	Hierarchy Acc	ount Opportunities	Account Profile	Activities	Activities - Roll-up	Addre
Chan	ge Remove]I 🔘 [D&B360 Refresh	D&B360 +	D&B Contacts	D&B360 View	D&B Look-A-Like	D&B Competitors	D&B Industr	ry D&B Financials	
D&B36	0 Information										



4. In the **D&B System Settings** area, select the **Enable D&B360 Permissions** check box.

Note: All features are enabled by default. To remove a feature, clear its check box. D&B System Settings Allow Account Edit : When chosen Allow Callout Log : When chosen, Allow Account Edit: 📝 section. Create an Account when Creating Opportunities: Allow Duplicates : When chosen, Allow Callout Log: Allow Contact Creation: Allow Contact/Opportunity Dupli Allow Duplicates: duplication is not allowed. Allow Contact/Opportunity Duplicates : Allow Contact Creation : When cl Allow Account/Opportunity Duplicates: Select Enable D&B360 Wh Allow Opportunity Creation: Permissions. Enable D&B360 Permissions: Enable D&B360 Permissions : WI access the functions through the D&

5. In the **D&B360 Button Configuration** area, to specify which features to display, select the corresponding check boxes.

— or —

To prevent a button from displaying, clear its check box.

D&B360 Button Configuration	
D&B360 Button Configuration D&B360 +: ♥ D&B360 View: ♥ D&B Contacts: ♥ D&B Look-A-Like: ♥ D&B360 Refresh: ♥ D&B Competitors ♥ D&B Industry ♥	 D&B360 + button allows users to view all of the D&B data licen D&B360 View button allows users who have licensed the Precoss-sell opportunities. D&B Contacts button allows users to search for contacts ass D&B Look-A-Like button allows users to search for other con D&B360 Refresh button allows users to pull in the most curren compared to the D&B360 object. D&B Competitors allows users to access a list of competitor Accounts, Contacts, or Opportunities from them. D&B Industry Allows a user to view Industry profiles associa
D&B Financials	Industry profiles are powered by First Research industry expe D&B Financials Allows a user to view financial data such as I



6. In the D&B360 **ROW Annotation Configuration** area, to specify which ROW features to display, select the corresponding check boxes.

```
— or —
```

If you want to remove a ROW item, clear its check box.

RO	W Annotation Configuration	
	Alerts	V Blogs V
	Facebook	Finance
	LinkedIn	Map 🔽
	Skype 🖉	✓ Twitter ✓
	Youtube	V

7. In the Siebel Administration window, User Role Configuration area, select Configure User Roles.

Siebel Administration					
					About D&B350
Siebel Administration					
Welcome to D&B360! This tab allows you, as the	D&8360 Administrator, to set up portions of	the application to	meet the policies of your company.		
The D&B Licensing section allows you to see the	Terms and Conditions of your trial or control	ect with D&B360 at	t any time. It also allows you to see w	hat functionality and data you	ur company is entitled to access.
The System Settings section is where you control	0.058360. The types of actions you can tak	e are:			
Decide if you want the State and Country fill Choose which System Settings, or function Choose which D&B360 buttons you want th Configure which Rest of World icons you w	Decide if you want the State and Country fields within D&B360 to be the 2 byte alpha ISO codes or full text descriptions. Choose which System Settings, or functionality, the users are allowed to access. Choose which D&B360 buttons you want the users to access. Configure which Rest of World icons you want the users to access.				
The Reports section contains a report that helps	you identify accounts that have the same D	-U-N-S Numbers a	nd may be candidates for the Siebel N	lerge process.	
The Batch Processing Setup section is where yo records that did not meet the minimum data requir	u schedule your initial and subsequent Nev ements for batch processing, matched at a	Batch and Refres Confidence Code	h jobs as well as set your Confidence below your designated threshold or h	e Code threshold. It is also wit ad a change in D-U-N-S Numb	here you do your data stewardship on the ber during a Refresh process.
The following sections allow you, as the D&B360 values that will be utilized throughout the applicat	he following sections allow you, as the D&B360 Administrator, to setup portions of the application, show you the entitlements for your company pertaining to D&B360, allow you to choose system preferences and load static alues that will be utilized throughout the application.				to choose system preferences and load static
Oracle Administration	Show Terms and Conditions				
Update User Data	Update API Connection Credentials		Select Configure		
User Role Configuration	Configure User Roles	4	User Roles		
Edition	Entitle	ment Type			
Ter3	Custor	n			
Product Name	License Activ	•	Metering Limit	Trial Indicator	Expiry Date

8. In the Role List window, select the role you want to edit and click Edit.

DKB Role List		
Back to Administration page		
Click Edit.	Role Name	Description
Edit 04-HKCSE	Siebel Administrator	Siebel Administrator



9. In the **Role Management** window, **Has Access** column, select the check box for each role you want users to have permissions for.

— or —

Clear the check box for roles you want to block from the user.

Show: D&B360 Administration 🛛 👻 🎽 🕮 🎿 🗍 🔀 🕘	Reports	✓ Saved Queries: * All Contacts
Back to Role List		
Role Management: Siebel Administrator Cancel Save		
Page	Control	Has Access?
Accounts with D&B360	Add Account	V
Contacts with D&B360	Select Contact	
Contacts with D&B360	Select Opportunity	
Contacts with D&B360	Create Button	
Contacts with D&B360	Merge	
D&B Competitors	People Drill Down	
D&B Competitors	Create Account	
D&B Industries	Add Industry	
D&B Industries	Remove Industry	
D&B380 Build A List	Save Current Search	
D&B360 Build A List	People Search / People Results	
D&B360 Build A List	Company Search / Company Results	
D&B380 Build A List - Company Results	Create Account	
D&B380 Build A List - Company Results	Create	
D&B360 Build A List - Person Results	Create Contact	
D&B360 Build A List - Person Results	Create Opportunity	
D&B360 Build A List - Person Results	Create	
D&B360 Company Summary	Change	
D&B360 Company Summary	Remove	
D&B360 Company Summary	D&B360 Refresh	
D&B360 Company Summary	D&B360+	
D&B360 Company Summary	D&B Contacts	
D&B360 Company Summary	D&B360 View	
D&B360 Company Summary	D&B Look-A-Like	
D&B360 Company Summary	Add D&B Data	
D&B360 Company Summary	D&B Industry	
D&B360 Company Summary	D&B Competitors	
D&B360 Company Summary	D&B Financials	
D&B360 Credit	Add D&B Data	
Opportunities with D&B360	Select Opportunity on Person Results	
Opportunities with D&B360	Create Opportunity Manually	
Match Info	Add Account	
ROW	Add D&B Data	



10. In the Role List window, click Save.



11. For roles other than User Roles that you want to configure, repeat these steps (see this step on page 7-3.)

Stare and Compare Configuration	1	
A	utomatically select detected differences for update	
Select Fields for Update in Stare and	d Compare	
Field Name		Selected
Account Nam	e	
Account Desc	cription	
Billing City		V
Billing State		V
Billing Count	гу	∇
Billing Street	i i i i i i i i i i i i i i i i i i i	
Billing Zip/Po	ostal Code	
Phone		
Annual Reve	nue	
Site		Save.
Number of Er	nployees	
		Save



12. In the **Stare and Compare Configuration** window, **Select Fields for Update in Stare and Compare** area, select the check boxes for the fields you want to display, and then click **Save**.

Stare and Compare Configuration	
Automatically select detected differences for up	date 🔽
Select Fields for Update in Stare and Compare	
Field Name	Selected
Account Name	
Account Description	
Billing City	
Billing State	
Billing Country	
Billing Street	
Billing Zip/Postal Code	
Phone	
Annual Revenue	
Site	
Number of Employees	Save Click Save.





Chapter 8: Managing Batches

Overview of Batch Jobs	8-1
Understanding Key Features of D&B360 Batch Jobs	8-2
Record Eligibility	8-2
Confidence Code Threshold Facts	8-2
Validating D-U-N-S Numbers	8-2
Scheduling Batch Jobs	8-3
Scheduling New Batch Jobs	8-3
Scheduling Refresh Batch Jobs	8-4

Overview of Batch Jobs

Two batch jobs are available through D&B360:

- New Batch Use to associate existing Siebel accounts with a valid D-U-N-S record. New Batch chooses accounts from Siebel and sends the account name and address to D&B for potential cleanse, match, and append processes. After D&B returns the batch records, the accounts in Siebel are associated with a valid D-U-N-S number.
- **Refresh Batch** After Siebel accounts are associated with a D-U-N-S number, a Refresh Batch is used once a month, or once a week, to refresh the D-U-N-S data stored in D&B360 Siebel tables.



Understanding Key Features of D&B360 Batch Jobs

The three key features of D&B360 Batch jobs are:

- Record Eligibility
- Confidence Code Threshold Facts
- Validating D-U-N-S Numbers

Record Eligibility

Every record picked for New Batch processing goes through a data quality check procedure. To pass this quality check, a record must have a Company Name and one of the following:

This field:	Phone
2 of these fields:	Billing City, Billing State, Billing Postal Code
5 of these fields:	Billing Address, Billing City, Billing State, Billing Postal Code, Billing Country, Phone

Note: If none of the three criteria is met, the records will get pushed to the Admin Review List.

Confidence Code Threshold Facts

- The range of Confidence Code is: 1 to 10
- Any number above 8 is considered to result in accurate match records.
- The setting can be adjusted by a D&B360 Administrator in the Batch Setup screen.

Records from D&B that fail to meet the defined Confidence Code Threshold are moved to the Admin Review List. They are not automatically re-processed in the next batch run. As the Administrator, you must manually process these records.

Validating D-U-N-S Numbers

An event such as a merger or acquisition can result in changes to the D-U-N-S number for a record.

Note: A Recertified D-U-N-S has occurred when we send records to D&B in a Refresh Batch job, and the returned records have a new D-U-N-S Number.



In the case of a Merger or Acquisition, re-certified D-U-N-S records will be updated within the D&B360 table with the following:

- Re-cert reason code
- Re-cert description
- DATS date when the new DUNS Number was assigned

Scheduling Batch Jobs

Each batch job has its own distinct schedule:

New Batch	When you are ready to execute a batch job for the first time, you must run the New Batch Job.
Refresh Batch	You can run Refresh Batch only after you have run New Batch at least once.

Scheduling New Batch Jobs

Make sure that you type your user credentials before you schedule a new batch. Complete the following:

- 1. In the New Batch Schedule area, enter the Start Time (date and time) for a new batch.
- 2. In the **Confidence Code** field, select from 1 to 10. The default is **8**. We recommend using a relatively high confidence code.
- 3. In the **Repeat Frequency** area, use the menu to specify how often you want to run the batch job, either **Does Not Repeat, Daily, Weekly**, or **Monthly**
- 4. Click Save Batch Settings.

New Batch Schedule			
Start Time Repeat Frequency	12/12/12 03:20 PM Daily	12/14/12 11:25 AM	Confidence Code: 04 💌
Refresh Batch Schedule			
Start Time Repeat Frequency	11/28/12 12:20 PM Does Not Repeat	12/14/12 11:25 AM	
		Save Batch Settings	Click Save Batch Settings.





		Repeat	Frequency	
	Does Not Repeat	Daily	Weekly	Monthly
Run the Task	Select Start Time and Date	Select Every day or Every weekday	Select the day of the week	 Select Day of the month, or Select the first, second, third, fourth, or last day of every month
Repeat Options	N/A	Select Repeat inRepeat until and	definitely or I choose the date a	and time.

Note: Depending on the number of records a batch job is processing, results will be available 24 to 72 hours after you submit the job. Smaller files typically take 24 to 48 hours to finish processing.

Scheduling Refresh Batch Jobs

Make sure that you type your User Credentials before you schedule a refresh batch. Complete the following:

- 1. In the Refresh Batch Schedule area, enter the Start Time (date and time) for a refresh batch.
- 2. In the **Confidence Code** field, select from 1 to 10. The default is **8**. We recommend using a relatively high confidence code.
- 3. In the **Repeat Frequency** area, use the menu to specify how often you want to run the batch job, either **Does Not Repeat, Daily, Weekly**, or **Monthly**
- 4. Click Save Batch Settings.

New Batch Schedule			
Start Tim Repeat Frequency	: 12/12/12 03:20 PM	<u>12/14/12 11:25 AM</u>	Confidence Code: 04 💌
Refresh Batch Schedule			
Start Tim Repeat Frequency	:: 11/28/12 12:20 PM :: Does Not Repeat ▼	<u>12/14/12 11:25 AM</u>	
		Save Batch Settings	Click Save Batch Settings.





Chapter 9: Reviewing Activity Logs, the Admin Review List, and D&B360 Reports

Expanding Your Reporting Options	9-1
Viewing Callout Logs	9-2
Accessing Activity Logs and the Admin Review List	9-3
Viewing and Processing Failed Batch Records in the Admin Review List	9-5
Reviewing D&B360 Reports	9-7
Duplicate DUNS Report	9-7
Using the Recertified D-U-N-S Report	9-8

Expanding Your Reporting Options

In the Siebel CRM, you can design reporting features based on specific information. D&B360 includes two fields that you can add to a record – the Association Date and the Association Status. These are shown in the following illustration.



										110
ell Inc.										1.1
enu	New Delete	Save Query				-				
Account Nar	me;* Dell Inc.	Site: 114315195		Account Tea	m: SADMIN		Association Dat	e:	12/8/2011	
Addr	ress: 1 Dell Way	State: TX		Main Phone	#; (512) 338-440	0	Association Status		с	
	City: Round Rock	Country: USA		Main Fax	#:	L				
Zip C	ode: 786827000			UF	tL:					
ons Notes Asso	ortment Profile Attachme	nts Bill To/Ship To Billing Accounts	Billing Items	Bilino Portal	Business Plans	Buying Groups	Call Reports (Calls Case	s Call Summary	Category CI
			Constant Sector Sector	Contraction of the second		and the construction		100		Contraction of the local division of the loc
		00000 010 0-1-1- 04000011			0.00					
unange Remove	D&B360 Refresh D	\$B360 + D&B Contacts D&B360 View	D&B Look-A-I	Like D&B Comp	etitors D&B Ind	lustry D&B F	inancials			
\$B360 Information	D&B360 Refresh D	\$B360 + D&B Contacts D&B360 View	D&B Look-A-I	Like D&B Comp	etitors D&B Ind	lustry D&B F	inancials			
B360 Information	D&B360 Refresh D	\$B360 + D&B Contacts D&B360 View	D&B Look-A-I	Like D&B Comp Headquarters	etitors D&B Ind	lustry D&B F	inancials ation Ownership (ow	vns / rents):	Owns	
B360 Information D-U-N-S Number: Primary Name:	088360 Refresh Di 114315195 Dell Inc.	8B360 + D&B Contacts D&B360 View Loc	D&B Look-A-I cation Status: al Employees:	ike D&B Comp Headquarters 0	etitors D&B Ind	Lustry D&B F	inancials ation Ownership (ow Telepho	vns / rents): one Number:	Owns (512) 338-4400	_
SB360 Information D-U-N-S Number: Primary Name: Primary Address:	D&B360 Refresh DA 114315195 Dell Inc. 1 Dell Way	88360 + D&B Contacts D&B360 View Loc	D&B Look-A-I cation Status: al Employees: Tradestyle 1:	Ke D&B Comp Headquarters	ettors D&B Ind	lustry D&B F	inancials ation Ownership (ow Telepho International D	vns / rents): one Number: Dialing Code:	Owns (512) 338-4400 0001	
Base Remove Base Information D-U-N-S Number: Primary Name: Primary Address: State / Province:	D&B360 Refresh DA 114315195 Dell Inc. 1 Dell Way Texas	SB360 + D&B Contacts D&B360 View Loc	D&B Look-A-I cation Status: al Employees: Tradestyle 1: Sales:	Headquarters	etitors D&B Ind	Loc	inancials ation Ownership (ow Telepho International D Empli	vns / rents): one Number: Dialing Code: loyees Here:	Owns (512) 338-4400 0001 2750	
BB360 Information D-U-N-S Number: Primary Name: Primary Address; State / Province: City:	D&B360 Refresh Du 114315195 Dell Inc. 1 Dell Way Texas Round Rock	SB360 + D&B Contacts D&B360 View Loc Total Globy	D&B Look-A-I cation Status: al Employees: Tradestyle 1: Sales: al Employees:	Like D&B Comp Headquarters 0 \$61,494,000,00 100300	ettors D&B Ind	Loc	inancials ation Ownership (ow Telepho International D Empli Major Industi	vns / rents): one Number: Dialing Code: loyees Here: ry Category:	Owns (512) 338-4400 0001 2750 Manufacturing	
Unange Remove 88360 Information D-U-N-S Number: Primary Name: Primary Address: State / Province: City: Country:	D&B360 Refresh Di 114315195 Dell Inc. 1 Dell Way Texas Round Rock USA	SB360 + D&B Contacts D&B360 View Loc Total Globe	D&B Look-A- cation Status: al Employees: Tradestyle 1: Sales: al Employees: Primary SIC:	Ke D&B Comp Headquarters 0 \$61,494,000,00 100300 3571	10.00	Loc	inancials ation Ownership (ow Telepho International D Empi Major Industr Prir	vns / rents): one Number: Dialing Code: loyees Here: ry Category: mary NAICS:	Owns (512) 338-4400 0001 2750 Manufacturing 334111	

Viewing Callout Logs

The callout log tracks all web service definition language (WSDL) calls that occur between your CRM system and D&B.

1. In the D&B360 window, Siebel Administration area, click D&B360 Call Out Logs.

Reports		
Duplicate D-U-N-S k	dentification	Recertified D-U-N-S Report
Batch Processing S	etup	
Batch Processing		
Batch Setup	Admin Review	List
D&B Callout Logs		
Call Out Logs	Click Call O	ut Logs.

In the D&B Callout Log column, select the transaction ID link for the Callout Log you want to view.
 In the following example, the callout log for a DNB Refresh Check is selected.



Recent DNB Callout Logs		
Back to D&B Administration		
DNB Callout Log	Callout Operations	Created Date
1F69125D-2D3F-4863-87E2-EB612119A5B3	DNB Refresh Check	10/26/2011
121D4BC9-75B1-48F6-AE83-1C4E8B319FBB	DNB Company Append	10/26/2011
36AEF673-8D7F-4B57-91AD-2A1C890EB904	DNB Cleanse Match	10/26/2011
C70FCD6F-42B7-422B-987E-4F8D0D29DA33	DNB Contact Search	10/25/2011
0DBB9E37-D15A-41F9-B97E-8513F189EACD	DNB Contact Search	10/25/2011
BEE5A56B-86EF-4A88-809B-BEC0587589AE	DNB Contact Search	10/25/2011
39DFC9EA-B32D-4F3D-8C41-947813E832FD	DNB Find Person by Keyword Search	10/25/2011
67195F80-ED00-4CC5-A7AC-9ACF0069F92B	DNB Company Append	10/25/2011
DA80BBAC-D1FA-49E9-B427-41068F3925F3	DNB Contact Append	10/25/2011
DDBB1ABB-2C94-47AD-AD81-D4A2482DBEAC	DNB Find Person by Keyword Search	10/25/2011
Show 25 items		

An example of the information that displays for a callout log is shown in the following illustration. Callout logs often help Customer Support resolve any issues about that operation.

DNB Callout Log Detail		
Back to D&B Callout Log		
Delete		
DNB Callout Log 1F6	9125D-2D3F-4863-87E2-EB612119A5B3	Owner 8a319767-f477-4eb4-8c71-7c5013d3d01f
DNB Callout Logs		
Callout Operations DN TransactionId 1F6 SO TP(TP) TP TP TP TP TP TP TP TP TP TP TP TP TP	B Refresh Check 59125D-2D3F-4863-87E2-EB612119A5B3 quest: 	
Ret Co Det Created By 10/	sponse: de:1 scription:Success - good call 26/2011 11:13:04 AM	

Accessing Activity Logs and the Admin Review List

- 1. In the D&B Administration window, scroll down to the Batch Setup area.
- 2. Click Batch Setup.
- 3. In the Batch Setup window, click the logs you want to view:
 - To monitor new batch jobs, click New Batch Activity Logs.
 - To monitor refresh jobs, click Refresh Batch Activity Logs.
 - To review records that process only manually, click Admin Review List.



4. To return to the Batch Setup area after you have opened a specific report, click Back.

DeB Batch Setup
Back to D&B Administration
D&B360 Batch Administration
D&B360 batch synchronizes data between Siebel and D&B. The batch runs in the background to make sure you have access to the latest D&B data at your finger tips. Specify schedule for running batch jobs.
New Batch Activity Logs Refresh Batch Activity Logs Admin Review List

In both New Batch and Refresh Batch Activity Logs, two entries display for each job submitted:

- Submit type that displays the number of accounts sent to D&B.
- Receive type that displays the number of accounts D&B returns.

You can use pagination and sort capabilities to quickly locate the information you are looking for. The activity logs columns are described in the following table:

Column Name	Displays				
Start Time	Job start time.				
End Time	Job end time.				
Status	Submit task type for records sent to D&B.Receive task type for records returned from D&B.				
Total Accounts Processed	Number of records involved in a Submit or Receive task.				
# of Accounts Updated	Number of accounts sent to D&B for the Submit task type. For the Receive task type, displays the number of records that were updated with D&B data in the D&B360 table.				
# Accounts that Failed DQ Check	Number of records that failed initial data quality check and only for New Batch Submit type task.				
# Accounts below Confidence Code	Number of records with a confidence code below the organization's set threshold value and only for a New Batch Receive type task.				
# Failure Rows	Number of errors found.				
Error Message	Last error message.				
# Records Refreshed	Number of records that were refreshed with D&B data in the D&B360 table and only for a Refresh Batch Receive type task.				
# Recertified Records	Number of records that had new D-U-N-S Numbers assigned and only for a Refresh Batch Receive type task.				



The following illustrations show examples of the batch logs:

	Dee New Batch Activity Logs								
	Back to Batch Setup								
	Start Time	End Time	Status	Total Accounts Processed	# of Accounts Updated	# of Accounts that Failed DQ Check	# of Accounts below Confidence Code	# of Failure rows	Error Message
I	3/26/2012 6:36:39 PM	3/26/2012 7:53:36 PM	Received	214	0	214	0	0	
I	3/20/2012 8:11:32 PM	3/23/2012 8:03:30 PM	Received	433	4	428	0	0	
l	3/22/2012 10:21:38 PM	3/22/2012 11:56:57 PM	Received	214	0	214	0	0	

Refresh Batch Activity Logs								
Back to Batch Setup								
Start Time	End Time	Status	Total Accounts Processed	# of Accounts Refreshed	# of Failures	Error Message		
3/26/2012 6:36:39 PM	3/26/2012 7:25:01 PM	Received	970	947	0			
3/20/2012 8:16:38 PM	3/23/2012 7:25:49 PM	Received	1907	1867	0			
3/22/2012 8:16:38 PM	3/22/2012 9:03:00 PM	Received	960	937	0			

Viewing and Processing Failed Batch Records in the Admin Review List

Accounts without a D-U-N-S Numbers are batched and sent to D&B for matching with D&B's D-U-N-S data. Some accounts cannot be sent because they don't meet 80% completeness. These accounts are listed in the Admin Review List for review and resolution.

When the information is returned from D&B, most of the accounts will have been matched with D-U-N-S Numbers. Some accounts will be sent to the Admin Review List for one of the following reasons:

- They were unable to be matched.
- They were matched, but the confidence code is below the default.

Whenever accounts are on the Admin Review List, you must review the information and correct it so that these accounts can be successfully processed.





Refresh batch results can also produce items that you must manually review and resolved. For example, you need to change or accept the modified data.





Reviewing D&B360 Reports

The two D&B360 reports that are valuable in the review and resolution of some common situations include:

- Duplicate DUNS Report
- Recertification Report

Duplicate DUNS Report

If more than one account with the same D-U-N-S Number exists, it is listed on the Duplicate DUNS report.7

The tier level of your license agreement determines the type of access you have:				
Tier 1	Access to report, but unable to merge accounts.			
Tier 2	Access to report, and can merge accounts.			
Tier 3	Access to report, can merge accounts, and can prevent duplicates from being created at all (see "Considerations for Administrators " on page 2-2).			

Note: The tier level of your license agreement determines the type of access you have: Tier 1: Access to report, but cannot merge accounts.

To resolve duplicates, you need to review the information in each of the duplicates and then:

- Decide which one is the master that is, which one should be the primary selection.
- Select an account with information you want to merge into the master.

Note: If you have three or more accounts with the same D-U-N-S Number, you can merge the information from more than one account into the master. However, you must do the merge operations one at a time since the merge function merges information from two sources at a time.

Duplicate D-U-N-S							
Back to D&B Administration							
Specify the order in which to merge these accounts. Accounts will be merged in the order specified with popluated values in first account retained over values in second, popluated values in second over third, and continuing until account merge is complete.							
D-U-N-S	Account Name	Owner	Merge				
114315195	Dell Inc.	SADMIN	ø				
	Dell	SADMIN	P				
081466849	Microsoft Corporation	SADMIN	P				
	Microsoft Corporation	SADMIN	I				
	Microsoft Corporation	SADMIN	ø				
	Microsoft Corporation	SADMIN	I				




Using the Recertified D-U-N-S Report

Periodically, a company's information will change, which triggers a change in the D-U-N-S Number. Use this report to identify these issues, so that you understand – and if necessary – can modify your account information.

Recertified D-U-N-S Report				
Back to D&B Administration				
D-U-N-S Number	Account	DATS Date	Recertified Reason Code	Recertified Reason
222121	Disneyworld	01/01/2011	D	D-U-N-S Number changed due to the Headquarters moving to a branch location.
222121	Lol	01/01/2011	м	D-U-N-S Number changed due to a Merger or Acquisition.
222121	NICO SRL	01/01/2011	с	D-U-N-S Number changed due to a branch location becoming a separate legal entity.
222121	Rosa Mesa Restaurant	01/01/2011	E	D-U-N-S Number changed due to being identified as a duplicate in D&B's database.





Appendix A: Troubleshooting

Frequently Asked Questions (FAQ's)	A-1
Tables Created During Installation	A-2

Frequently Asked Questions (FAQ's)

Question	Answer
Can D&B360 for Siebel CRM be installed once and accessed by multiple instances (or ORGs) of Siebel CRM?	No. During the installation, the Siebel CRM ORG ID is used to create a unique key to access our DaaS platform. A separate D&B360 for Siebel CRM installation will be needed for each Siebel CRM instance (or ORG) that needs access to D&B360.
What steps should I take if our existing implementation of D&B360 for Siebel CRM has expired?	 Follow these steps to re-install D&B360 after it has expired: 1. Verify that the existing D&B360 application has expired. 2. If expired, contact D&B360 Support and ask them to re- activate your Siebel CRM ORGID (Administration Setup / Company Profile / Company Information)
	 Note: If there's a reason D&B Support is unable to comply immediately, they will let you know at that time and assist you in getting the issue resolved as quickly as possible. 3. Install the latest D&B360 application

Dun and Bradstreet is committed to a high level of customer satisfaction. An efficient support process is combined with a communication service level agreement to give our customers quality support.



The communication SLA (Service Level Agreement) is as follows:

Initial Response	The maximum timeframe for initial response for all inbound issues is 4 hours.
Ongoing	SLA Determined with the customer.
Communication	Based on mutual agreement of the severity of the issue.

The communication SLA is based on normal business hours, which are considered to be:

- 8 A.M. 6 P.M. local time, Monday through Friday
- Excluding D&B holidays

To submit a ticket, go to this URL: <u>http://dnbus.force.com/support?prod=dnb360</u>. You will be prompted to enter your e-mail address and then fill out a form.

Tables Created During Installation

Installation of D&B 360 creates the following ta	ables in your database:
--	-------------------------

Table Name	Purpose	Туре
CX_ACCOUNTXT_X	An extension of the standard Account table. Holds D&B record related data.	Extension
CX_CCODE	Holds the Confidence code configuration for Batch process.	Batch
CX_DNBADMINT	Holds failed record details resulting from the batch jobs	Batch
CX_DNBCODE	Holds D&B360 for Siebel installer version information.	Installer Data
CX_DNBCOMPANY	Holds a copy of the D&B Company Data and is joined to the Siebel Account table through the CX_DNBCOMPANYXR table.	Data
CX_DNBCOMPANYXR	Holds the relationship between the Account and D&B Company Record.	Xref
CX_DNBCONTACT	Holds a copy of the D&B Person Data and is joined to the Siebel Contact table through the CX_DNBCONTACTXR table.	Data
CX_DNBCONTACTXR	Holds the relationship between the Contact and D&B Person Record.	Xref



CX_DNBOPPTY2XR	Holds the relationship between the Opportunity and the D&B Contact Record.	Xref
CX_DNBOPPTYXR	Holds the relationship between the Opportunity and the D&B Company Record.	Xref

(!) Important Note: If you cancel the product license or it expires, you must remove or truncate all data in the tables of type Data. These tables hold a copy of D&B's data within the CRM system.







ndex	I
	installing D&B360
Α	first time 8-3
about D&B360 2-1	L
alerts 2-9	linkedin 2-10
В	М
blogs, from companies 2-9	maps 2-9
C	Ν
CRM	news, financial, feeds 2-9
user interface 2-1	R
D	rest of world 2-8
D&B360	S
packages 2-3	setting alerts 2-10
tiers 2-3	skype 2-10
F	social media applications 2-8
facebook, for companies 2-10	stocks, news 2-9
favorites 2-9	т
finance, news 2-9	tiers, description 2-3
G	twitter 2-10
graphical user interface for CRM 2-1	U
GUI see graphical user interface 2-1	user interface 2-1



۷

videos 2-9

Y

YouTube 2-9

