D&B360 Administration and Installation Guide

for Siebel CRM

Version 2.2

Table of Contents

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: http://get.adobe.com/reader/.

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

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.

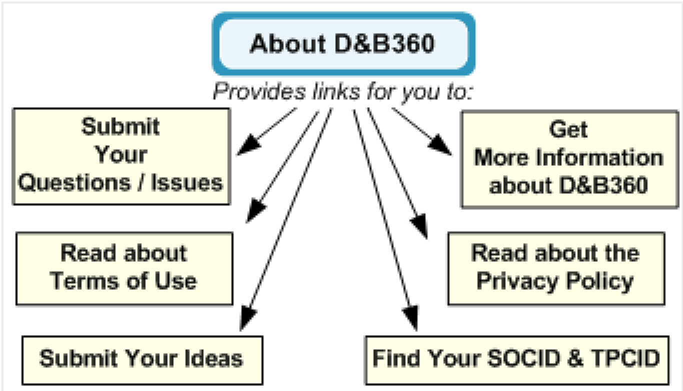
For that reason, this guide is organized by functions or tasks you are trying to accomplish. References to links or menu options that help you navigate your CRM are also included.

Chapter 2: Getting Started

Note: For more information about the user interface and other features of theSiebel 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 menu • Can 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	✓	✓	✓
➢ ➢ Twitter	✓	✓	✓
➢ ➢ LinkedIn	✓	✓	✓
➢ ➢ Skype	✓	✓	✓
D&B360 BUILD A LIST			
➢ ➢ D&B360 Build-A-List	✓	✓	✓
➢ ➢ D&B360 Look-A-Like	not available	✓	✓
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

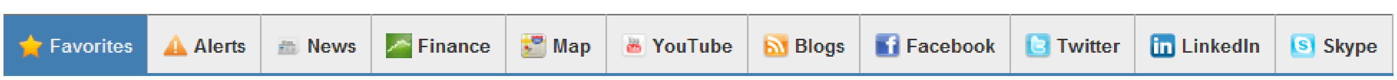
Dnb2	Repository folder: (1) TABLE DNBCOMPANYXR.sif (2) TABLE DNBCOMPANYXR_des.xml (3) TABLE DNBCONTACTXR.sif (4) TABLE DNBCONTACTXR _des.xml (5) TABLE DNBOPPTY2XR.sif (6) TABLE DNBOPPTY2XR_des.xml (7) TABLE DNBOPPTYXR.sif (8) TABLE DNBOPPTYXR _des.xml

Dnb3	Repository folder: (1) 10IO.sif (2) 10IO_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_Service_-_Inbound.xml (8) 1-29QAD_Web_Service_-_Inbound_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:



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

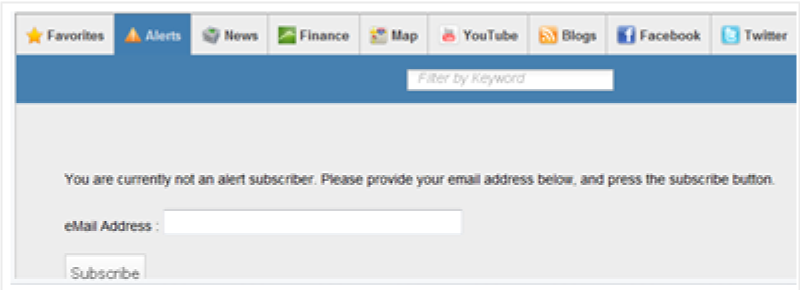
D&B360 currently supports the social and news media applications listed in the following table. From a D&B360 Account page, click **D&B360 ROW** to display the ROW tabs. To navigate through the ROW applications, click the tabs.

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.
Map	The Map icon pre-populates the Account Billing address and connects to Google Maps to show the address location.
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.

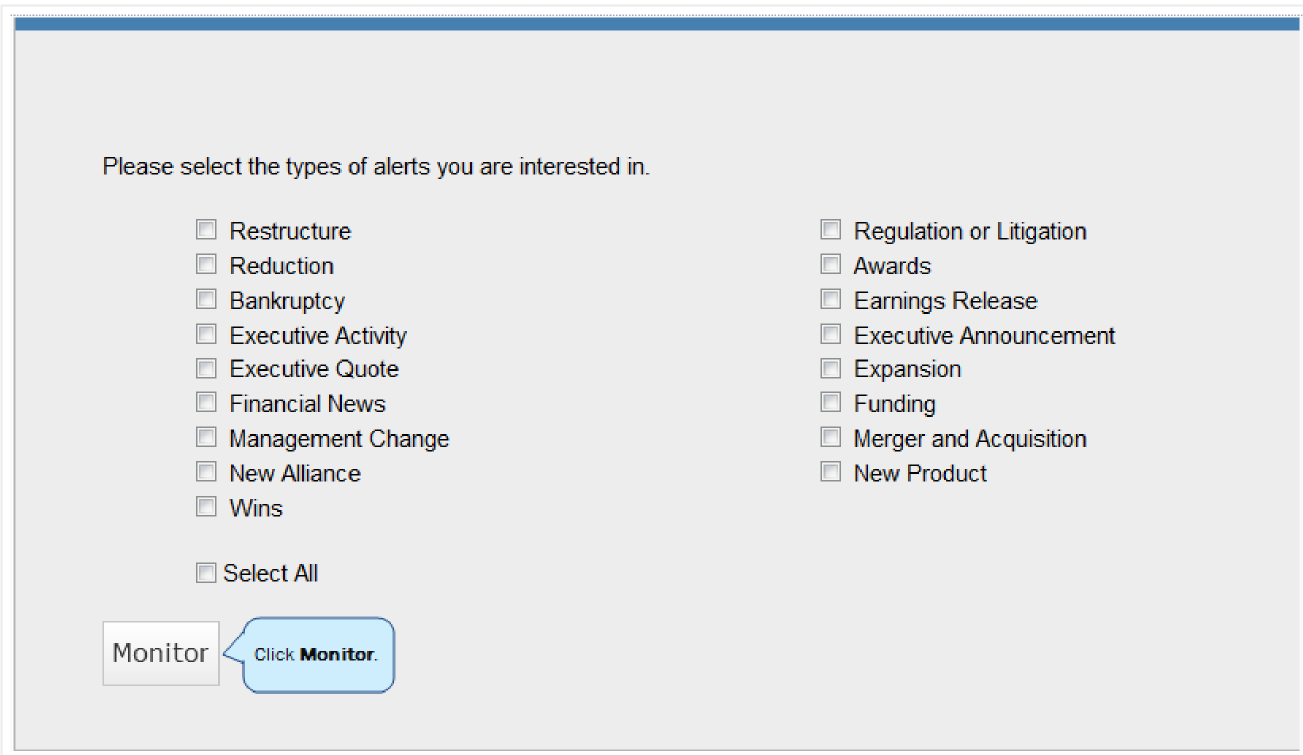
Facebook	Facebook is a social utility that facilitates communication. Only company authorized Facebook pages display for each company. To view Facebook information about people and companies from within D&B360, you need to have a Facebook account. A Facebook window opens to the account page you are currently 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.
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.
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.
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.**



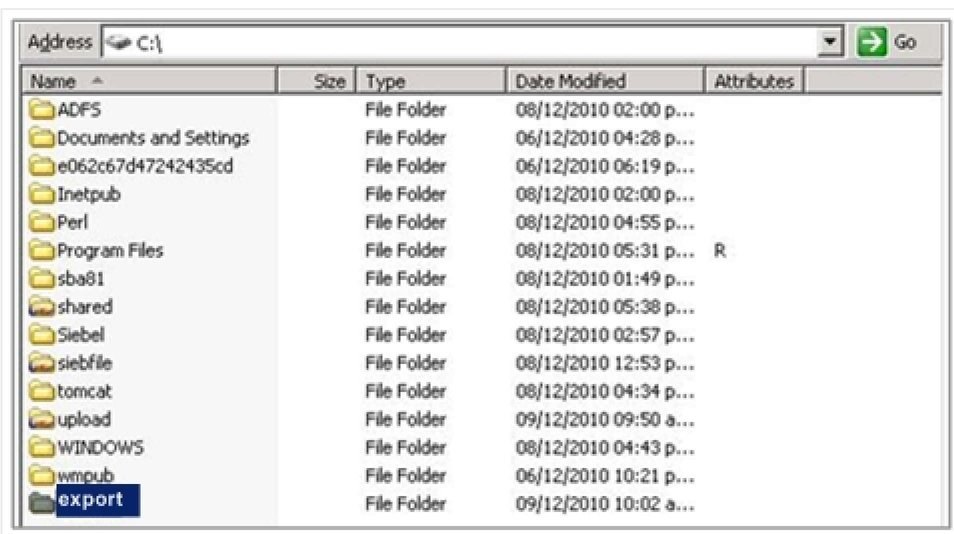
3. Click **Alerts.**
4. Select which type of alerts you are interested in, or click **Select All.**
5. Click **Monitor.**



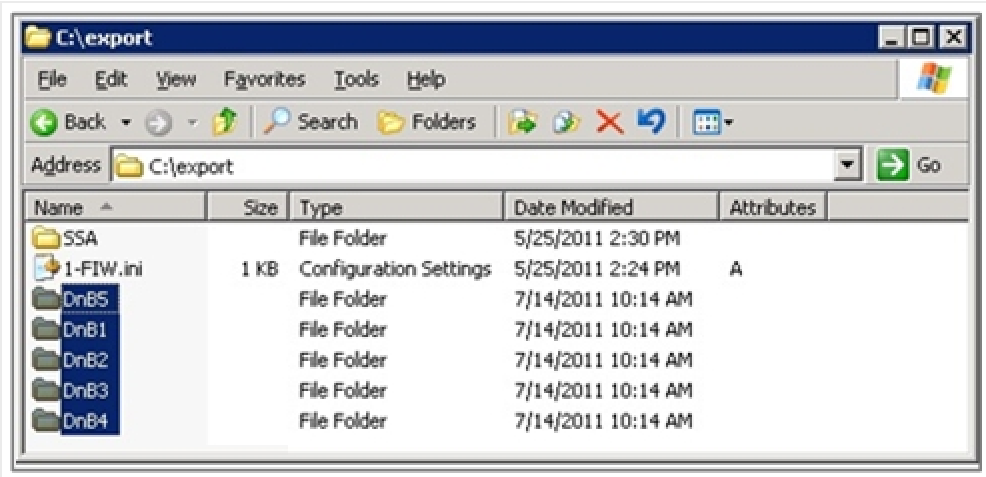
Chapter 3: Preparing Deployment Packages

Copying Folders from the Zipped File

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

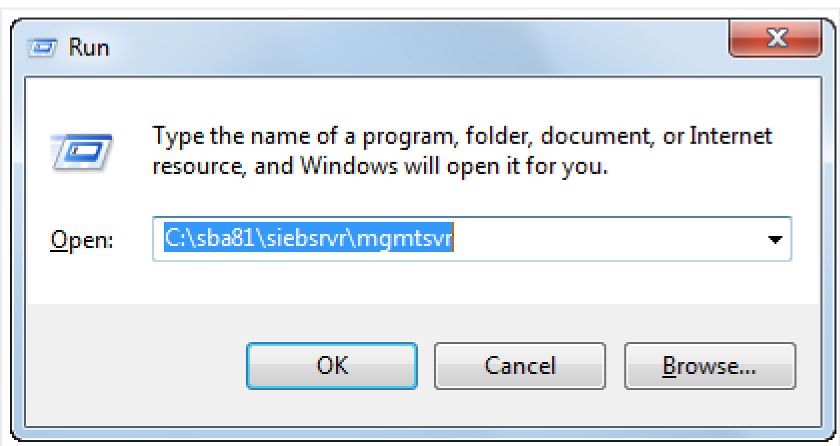


2. From the zipped file you downloaded (see "File Contents" on page 2-4), copy the DnB1, DnB2, DnB3, DnB4 and DnB5 folders to your `C:\export directory`.



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**.



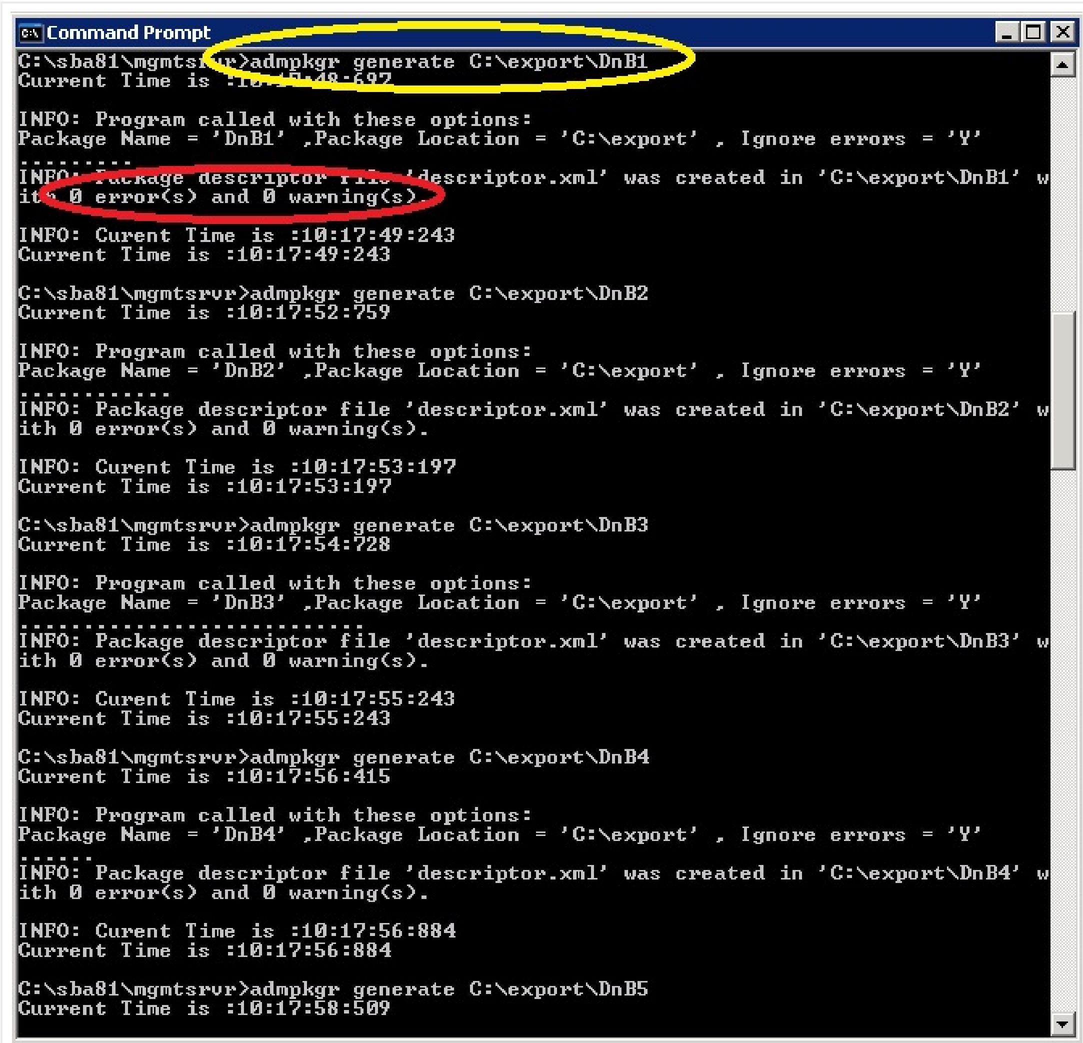
Note: Your directory path might be different depending on your Siebel Installation.

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.

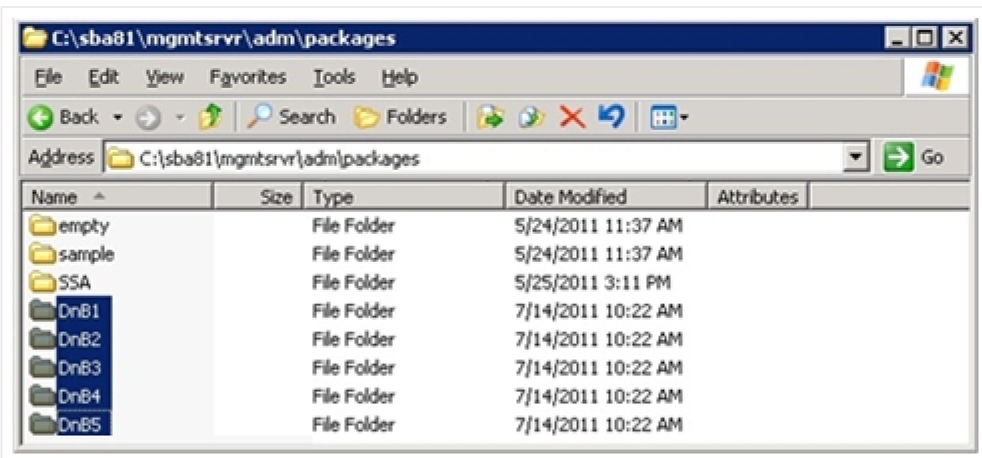


Moving Packages to the Default Package Directory

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.



Chapter 4: Deploying D&B Packages

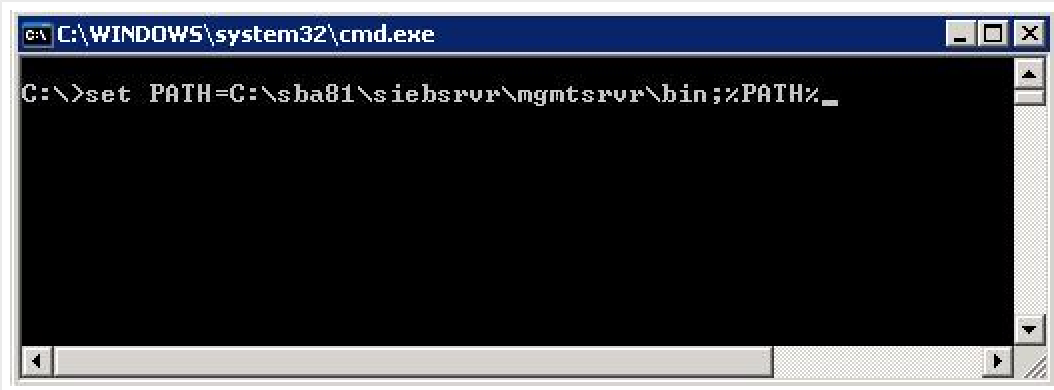
Initiating Package Deployment for DnB1, DnB2, and DnB3

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.



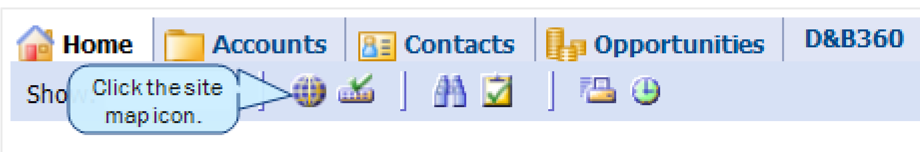
4. To change to the management server directory, type **`cd C:\sba81\siebsrvr\mgmtsrvr`**.

Locating and Validating the Enterprise Server

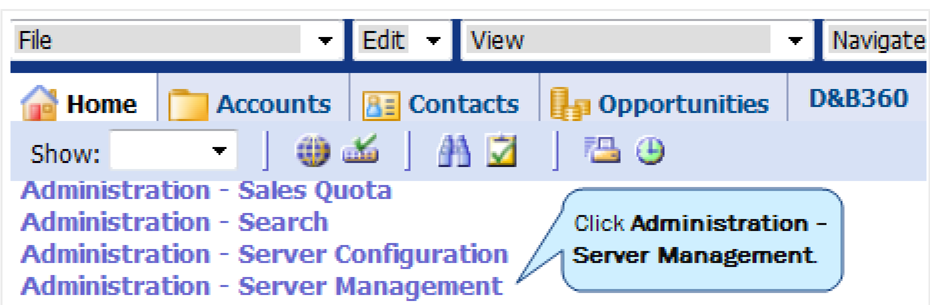
To locate the Enterprise Server, complete the steps in the section that immediately follows. If you do not need these instructions, skip to the see "Validating the Enterprise Profile File" on page 4-4.

Locating the Enterprise Server

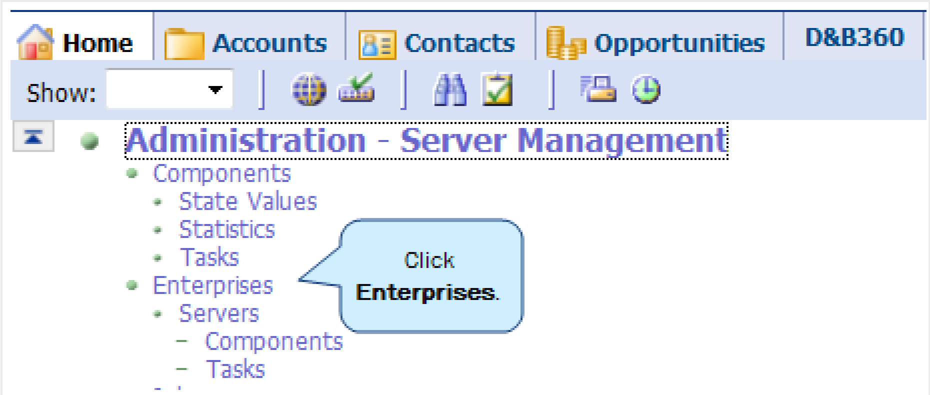
1. To search for Administration - Server Management, click the site map icon.



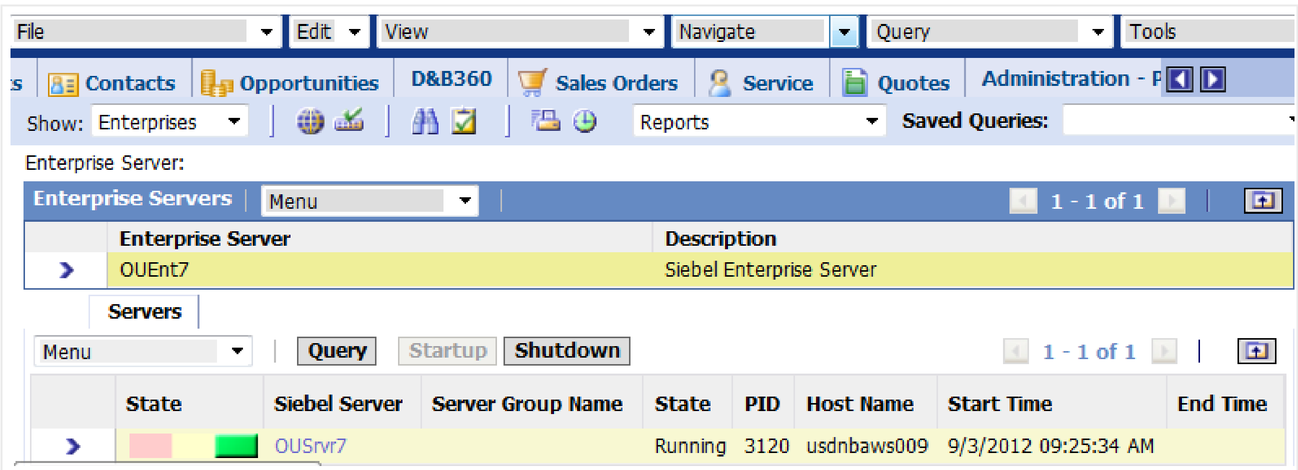
2. In the **Web Services** window, click **Administration - Server Management.**



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.



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

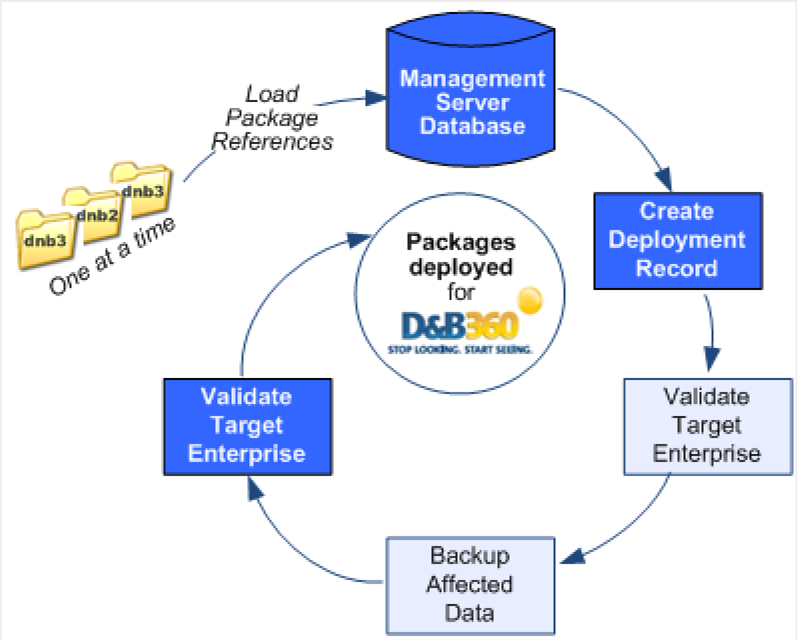
Note: If you have another CRM Enterprise Server Name, you can change QUEnt to your enterprise name.

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.

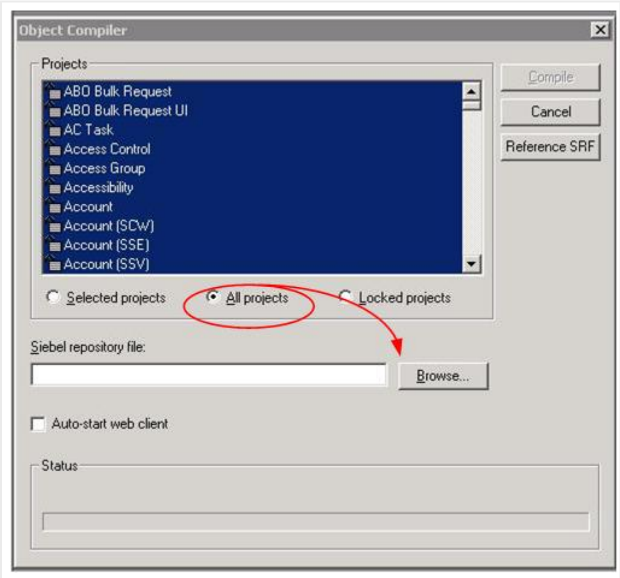
6. For the DnB2 package, repeat each of the steps starting with step 1.

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

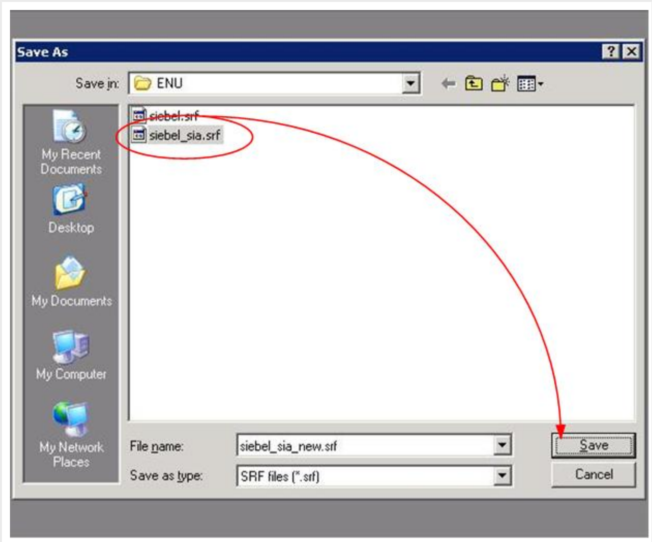
(!) Important Note: Before continuing with the installation,you MUST do a FULL Compile to activate the new changes. If you skip these steps, the installation will generate errors.

Compiling the Application

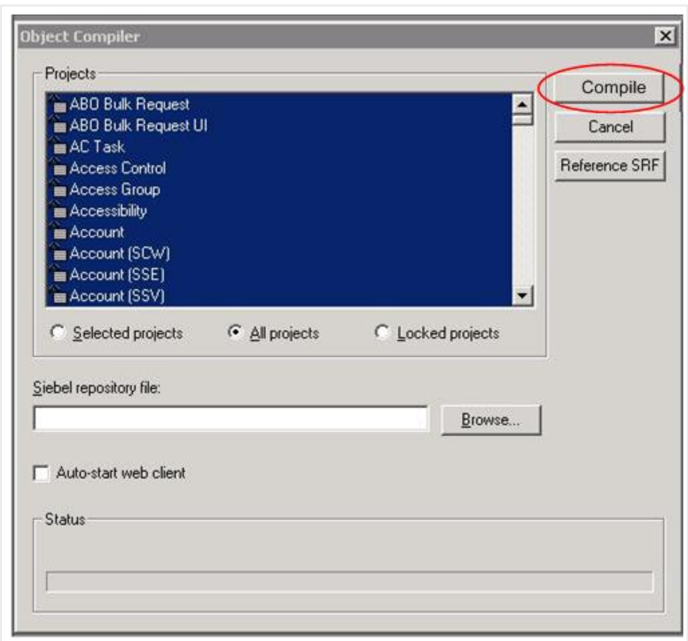
1. From the Siebel menu, click **Tools** -> **Compile Projects**.
2. In the **Object Compiler** window, select **All projects**, then click **Browse**.



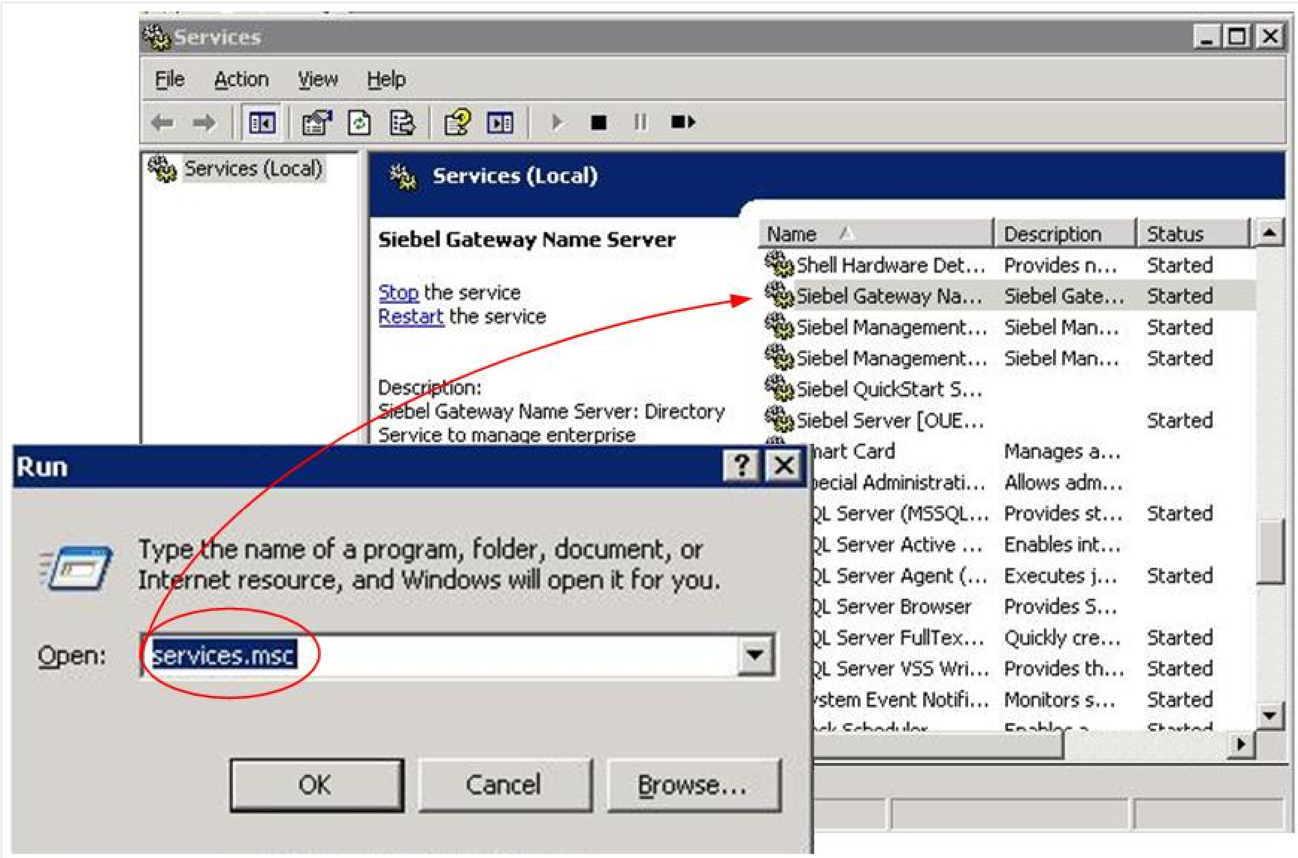
3. In the **Save As** window, select the directory path of your Siebel Server Installation, then click **Save.**



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



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



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 `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

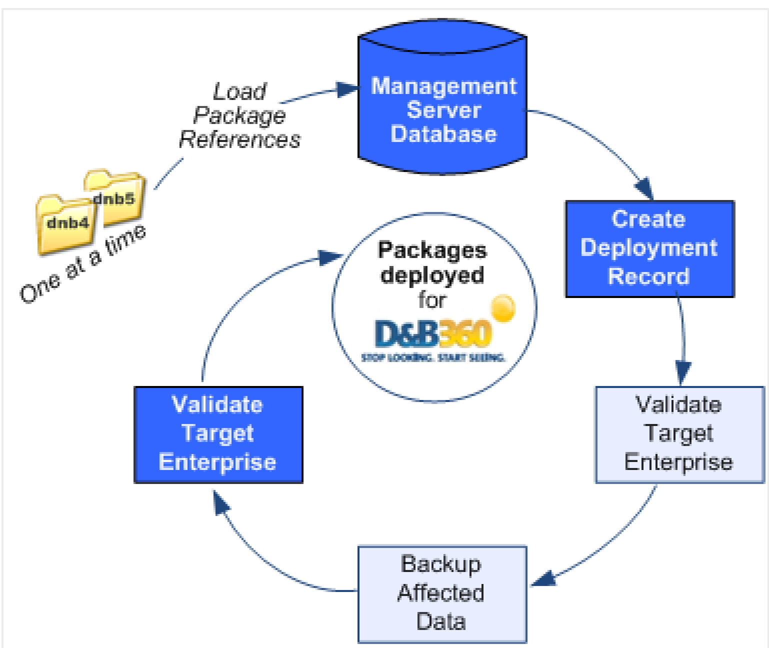
c. Siebel Server

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.

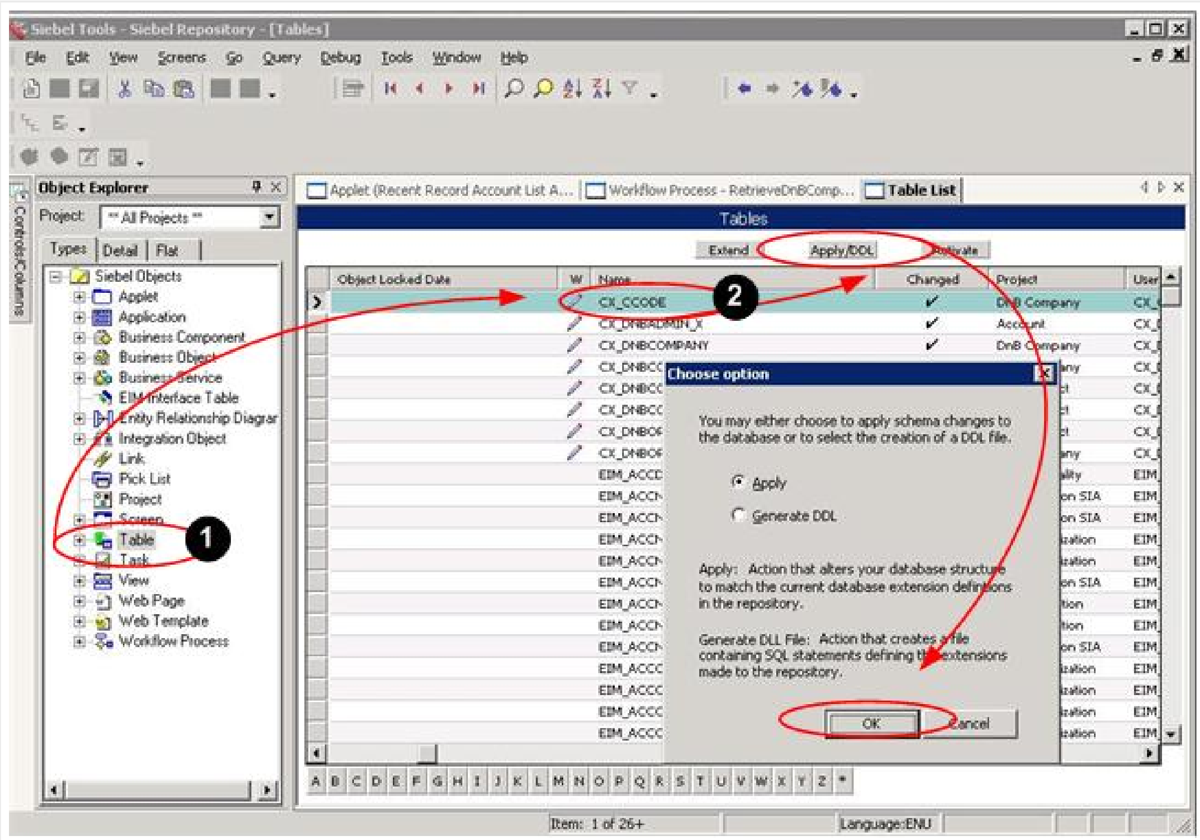
7. For the DnB5 package, repeat each of these steps starting with step 1.

8. When you have completed each package, run a full compile to activate the new changes.

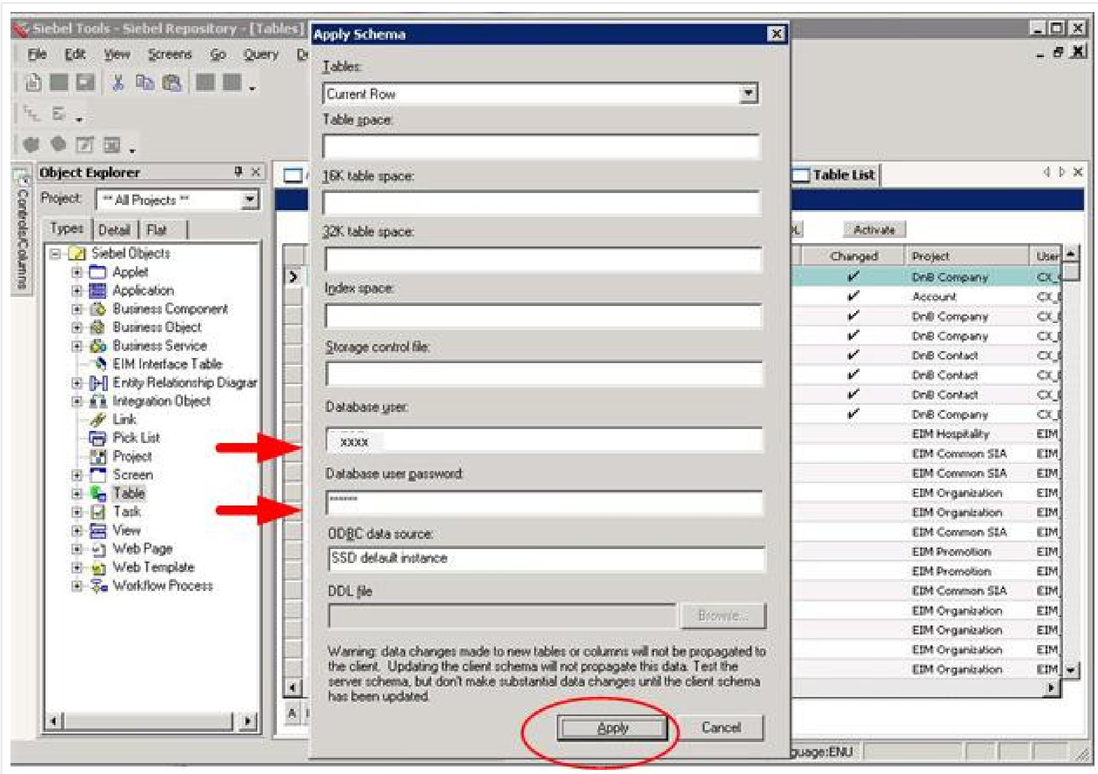
> **(!) Important Note:** Before continuing with the installation,you MUST do a FULL Compile to activate the new changes. If you skip these steps, the installation will generate errors.

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.**



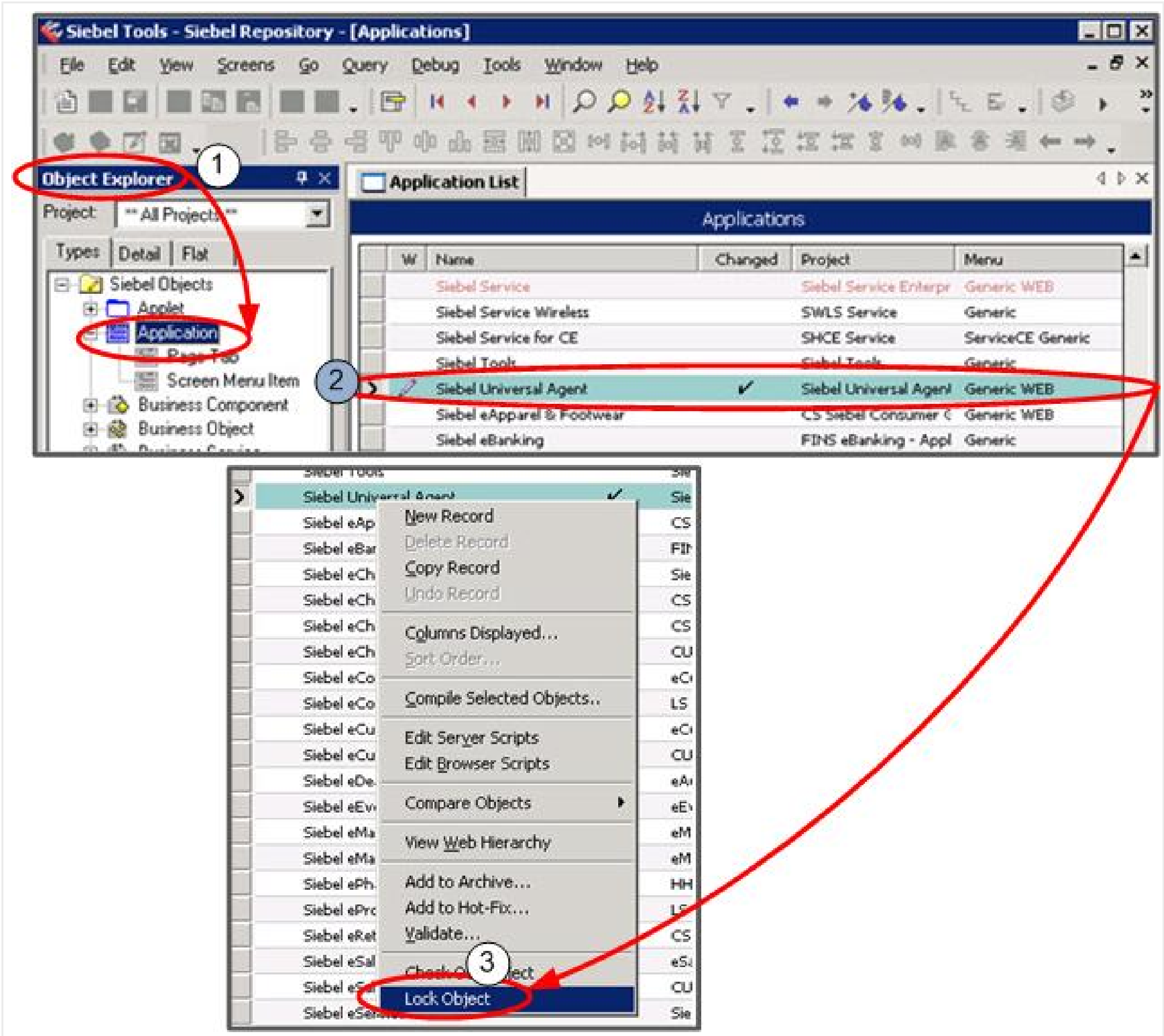
4. In the **Apply Schema** window, **Database user** and **Database user password** fields, type your user ID and password, and then click **Apply.**



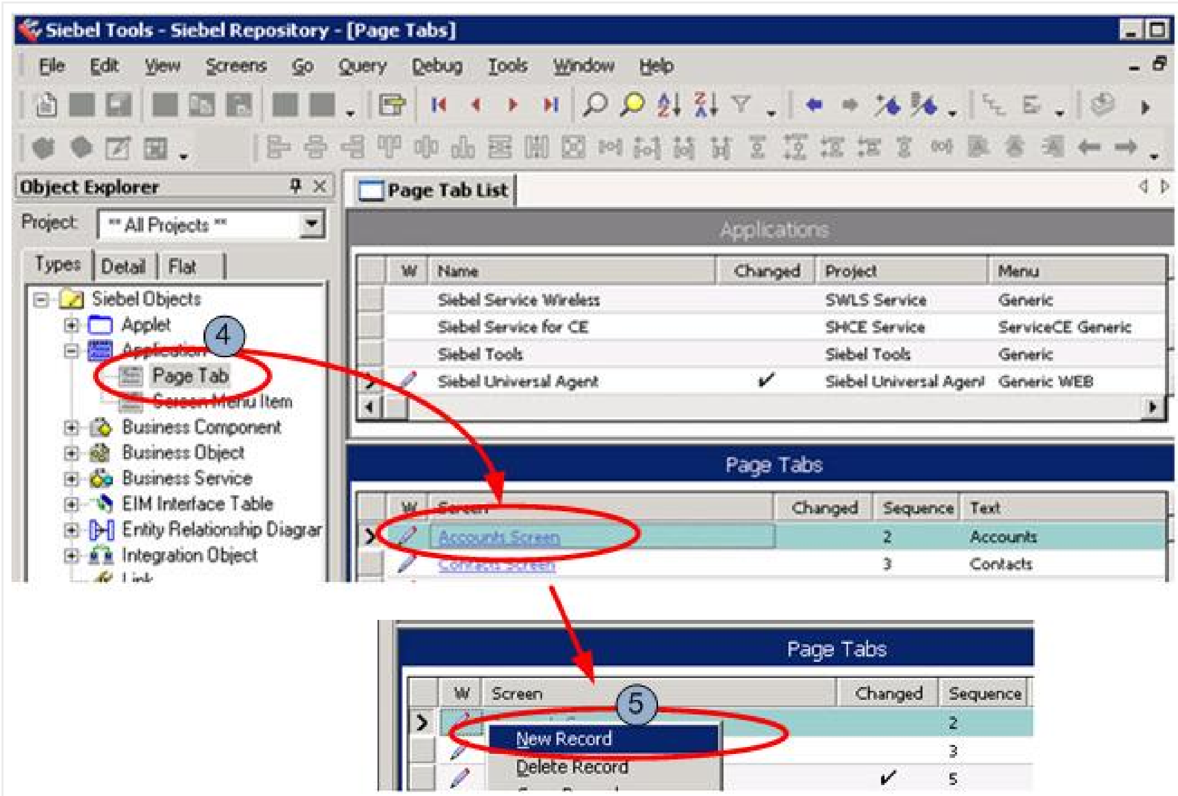
5. For all tables that start with CX, repeat these steps.

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.**



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.**

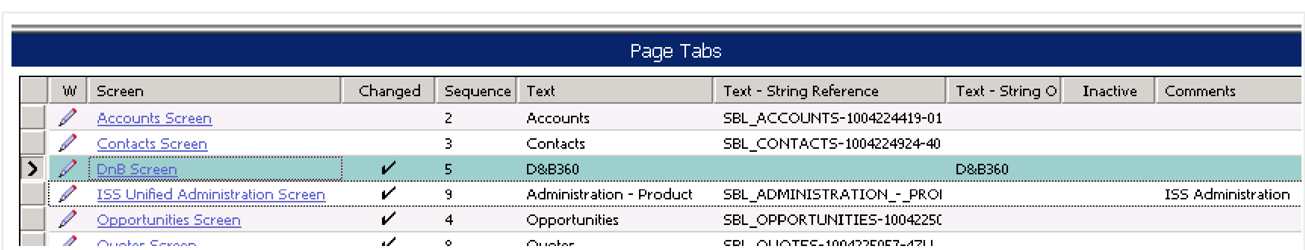


6. Populate the New Record with the following values:

   - 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.



8. Run a full compile.

Chapter 5: Generating the Org ID

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:

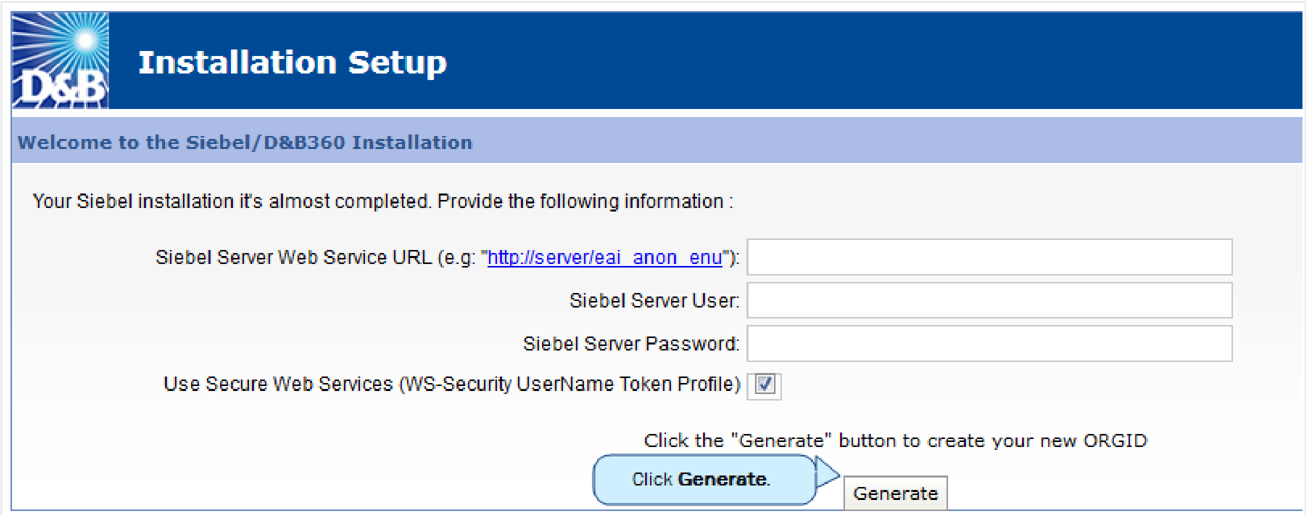
   a. Siebel Server Web Service URL

   b. Siebel Server User

   c. Siebel Server Password

   d. Use Secure Web Services (WS-Security UserName Token Profile — click to select.

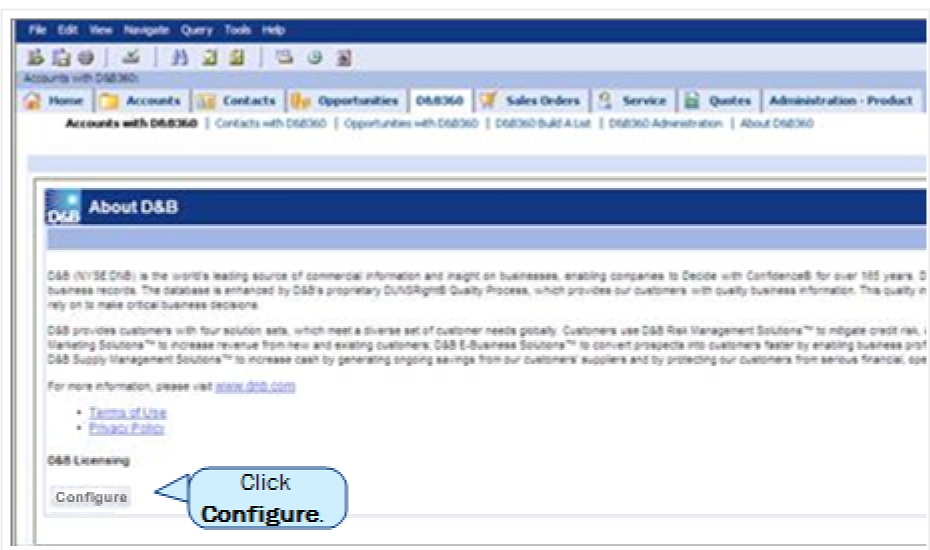
3. Click **Generate.**



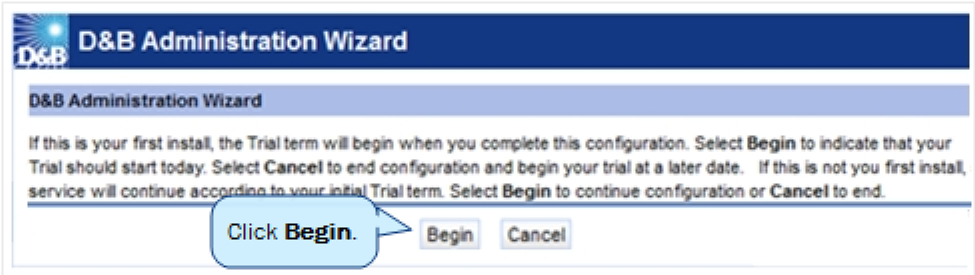
A message displays to inform you that Siebel D&B has been installed on your CRM.

Activating the Installation

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

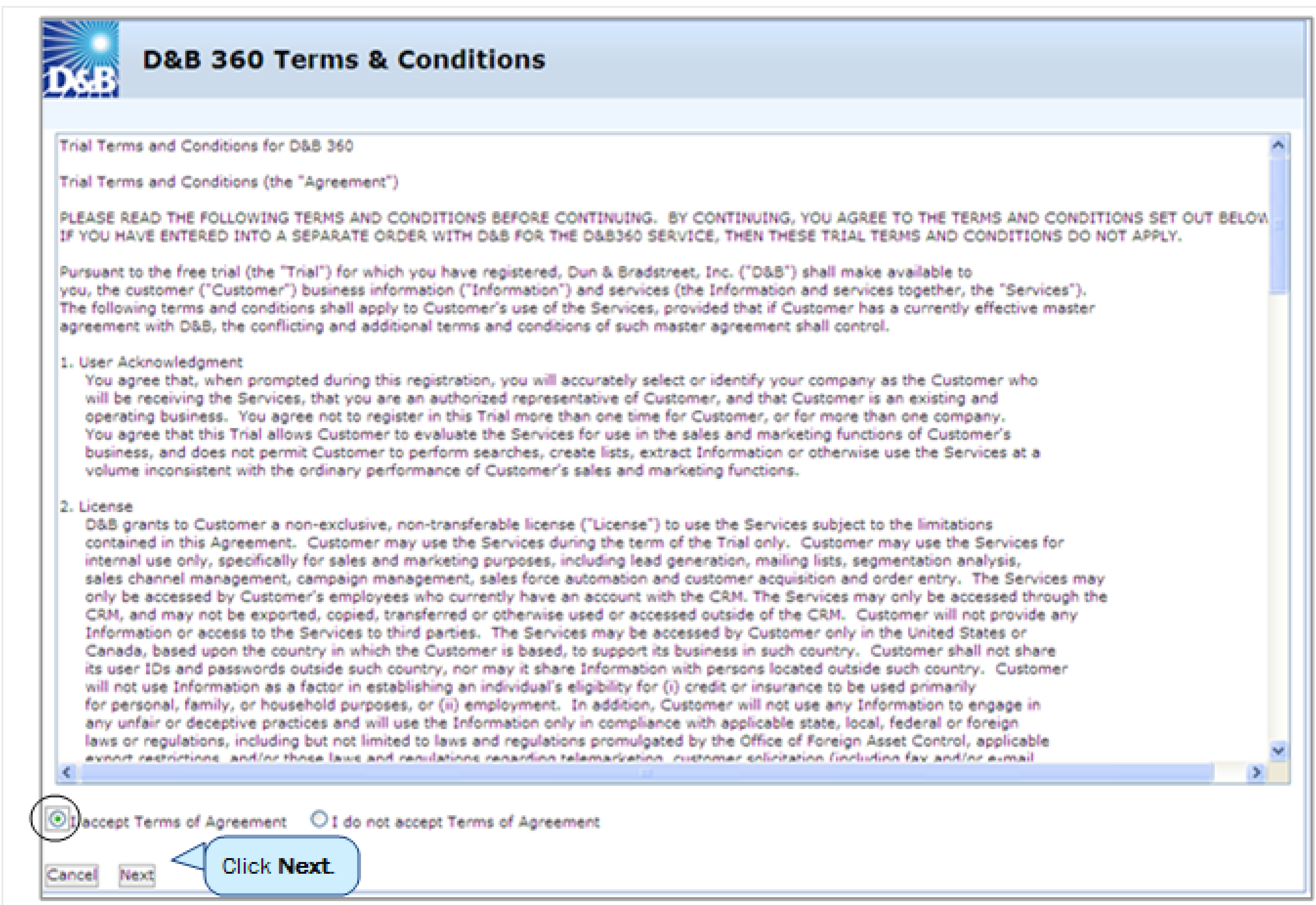


3. In the **D&B Administration Wizard** window, click **Begin.**



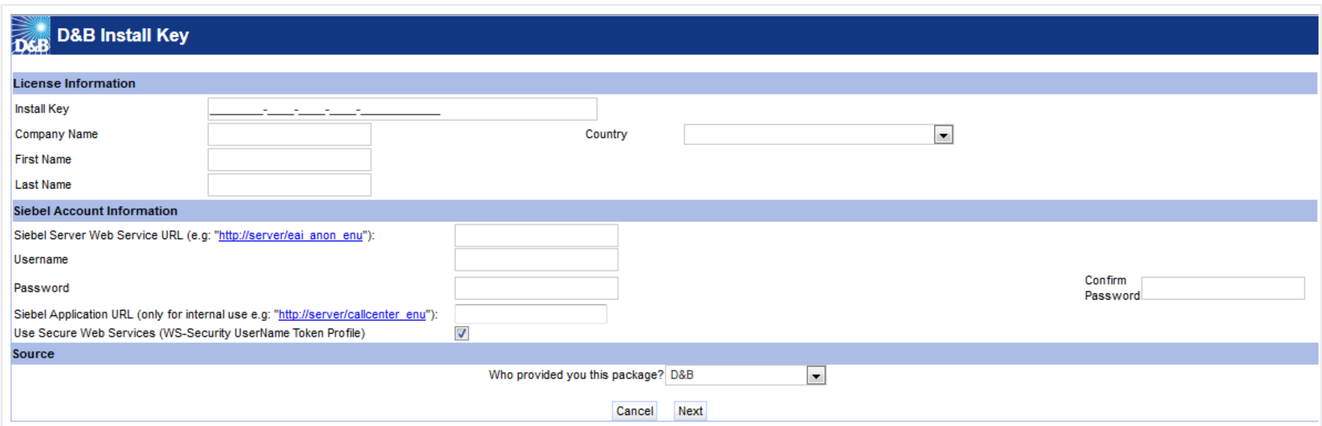
Note: Trial customers—Your 60-day trial period begins at the point of installation, as noted in the trial terms. If you are not yet ready to configure D&B360,we recommend that you click **Cancel** and configure your software when you are ready to start using it. This will allow you to take full advantage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

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



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.**



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

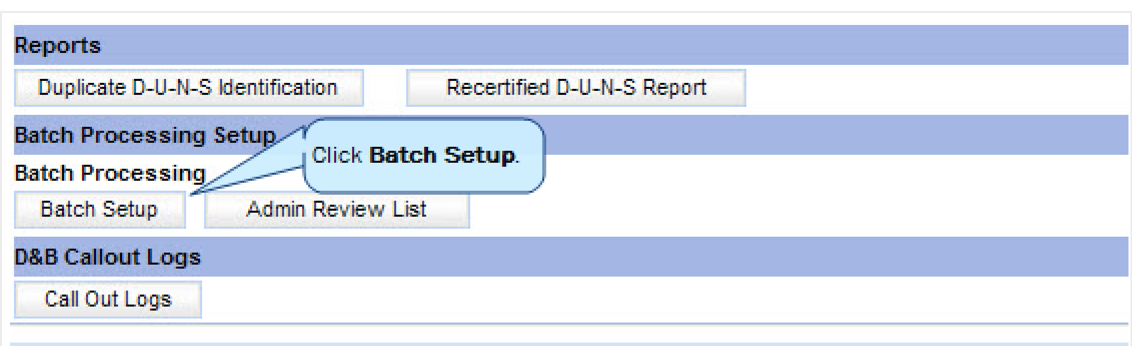
This chapter applies only if your account includes batch processing. If it does not, go to this chapter: **Establishing Permissions for Roles Within D&B360**.

Preparing for Administration of Batch Jobs

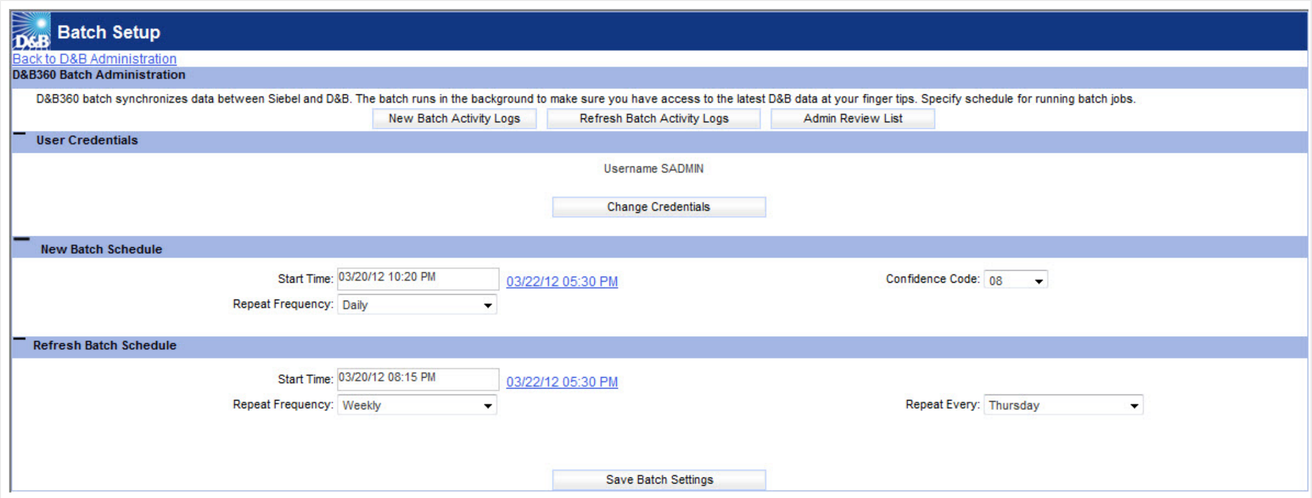
If your account includes batch processing, before you can schedule and run batches, you need to install and configure the Informatica Cloud Secure Agent. For information about see "Managing Batches" on page 1.

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**.

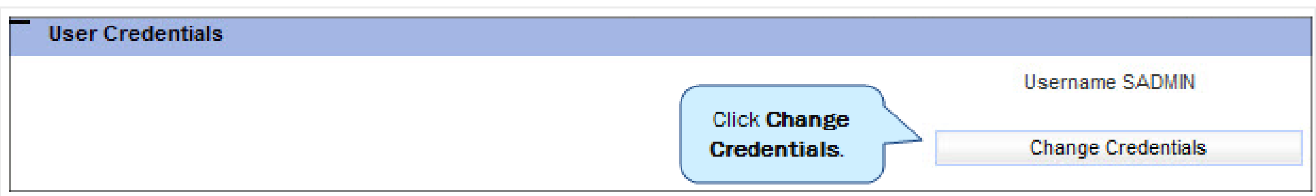


The **Batch Setup** window includes three areas: **User Credentials**, **New Batch Schedule**, and **Refresh Batch Schedule.**



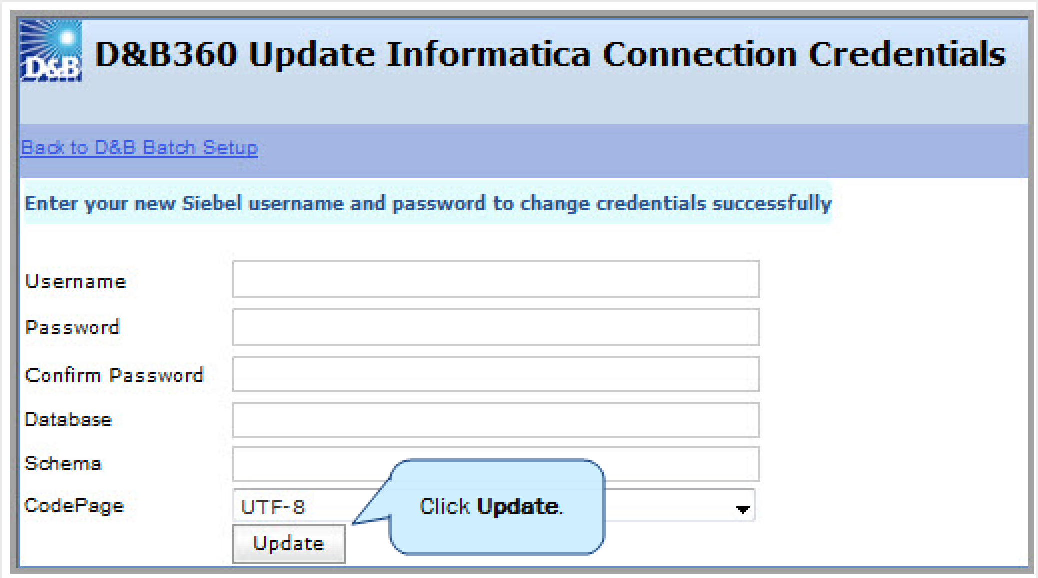
Note: To schedule and run a batch, the credentials you use are your Siebel user name and password. If you want to allow another user the rights to run a batch, you can update that user's information in the Batch Setup User Credentials area.

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



3. In the **D&B360 Update Informatica Connection Credentials** window, type the following information, and then click **Update**:

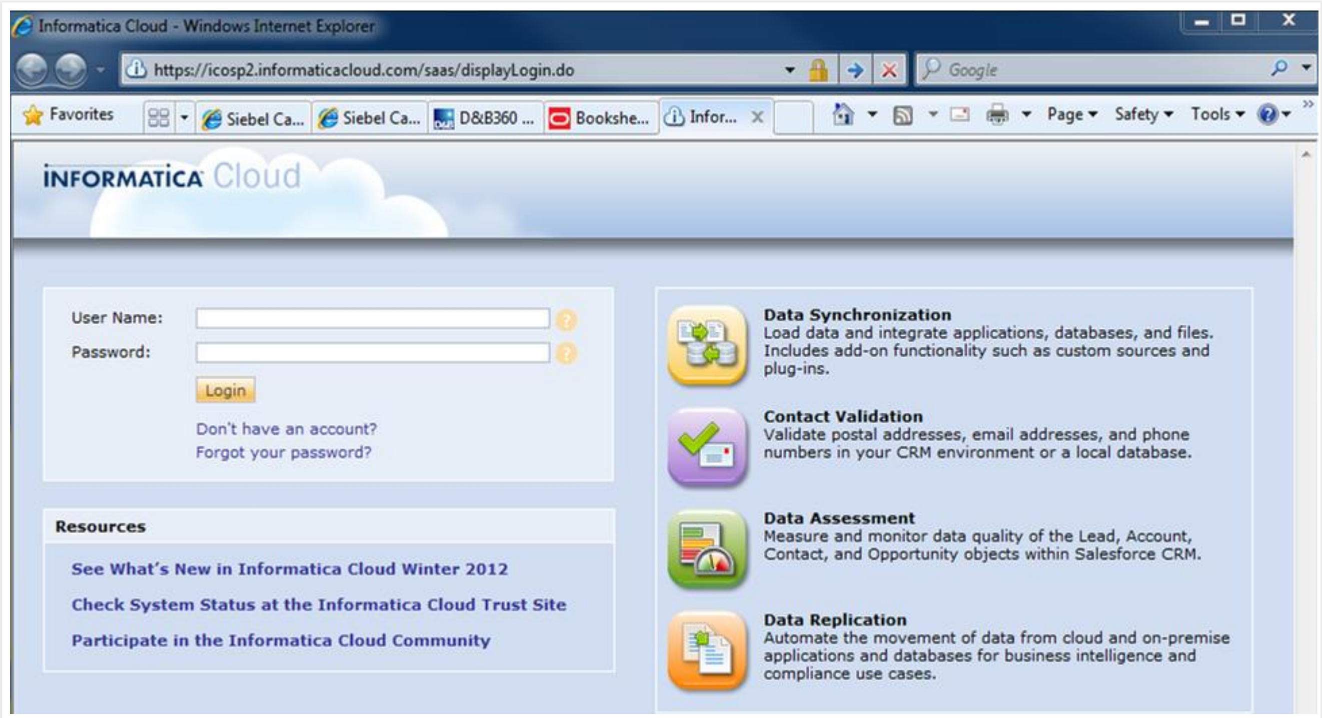
   - Username
   - Password
   - Confirm Password
   - Database
   - Schema
   - CodePage



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.

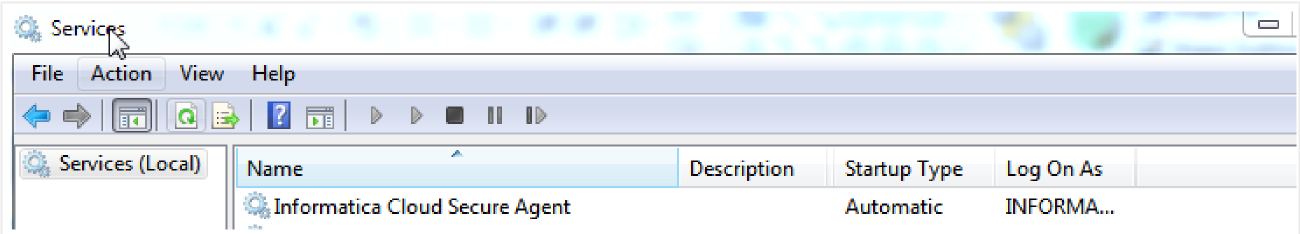
1. Open a browser window and enter this URL in the address line (or click it here): https://icosp2.informaticacloud.com/saas
2. Type your User Name and Password to log in to the Informatica Cloud application. If you do not have your log in information, contact D&B support.



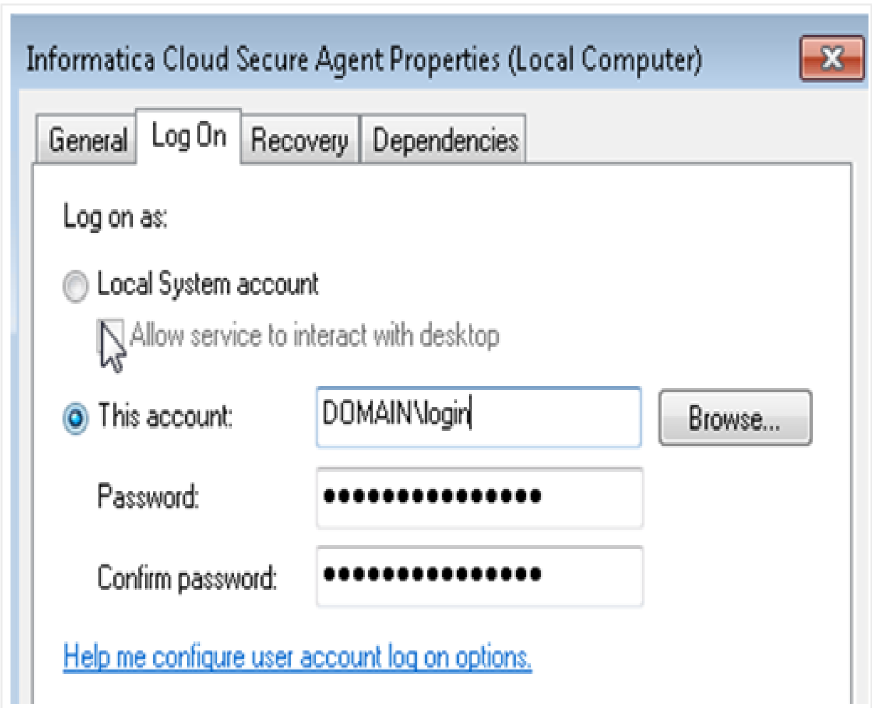
3. Click the **Configuration** tab, and in the **Agents** area, click **Download Agent.**

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

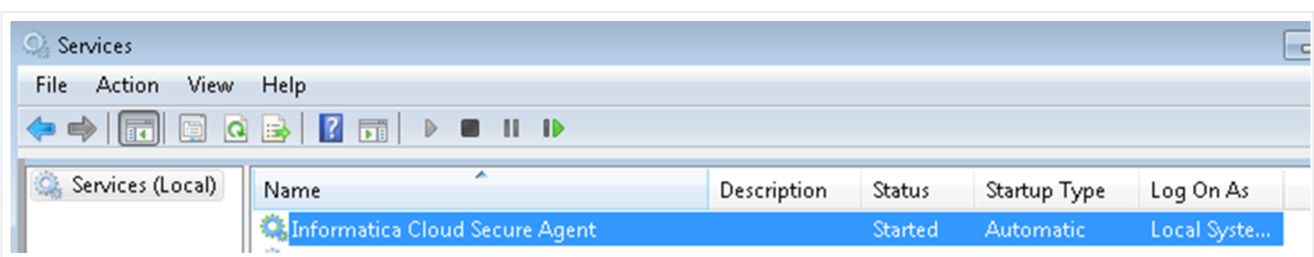
4. In the installation wizard window, follow the instructions.
5. Select **Windows Administrative Tools** -> **Services.**
6. In the **Services** window, **Services (Local)** area, stop the Informatica Cloud Secure Agent service.



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.



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



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.

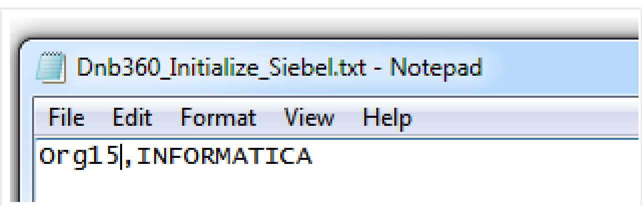
Type of Server	Required Parameters
SQL	• Siebel Database Host Name (or IP address) • Database Name • User Name • Password • Schema Owner • Port Number
Oracle	• Siebel Database Host Name (or IP address) • SID • Service Name • User Name • Password • Port Number
IBM DB2	• Siebel Database Host Name (or IP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

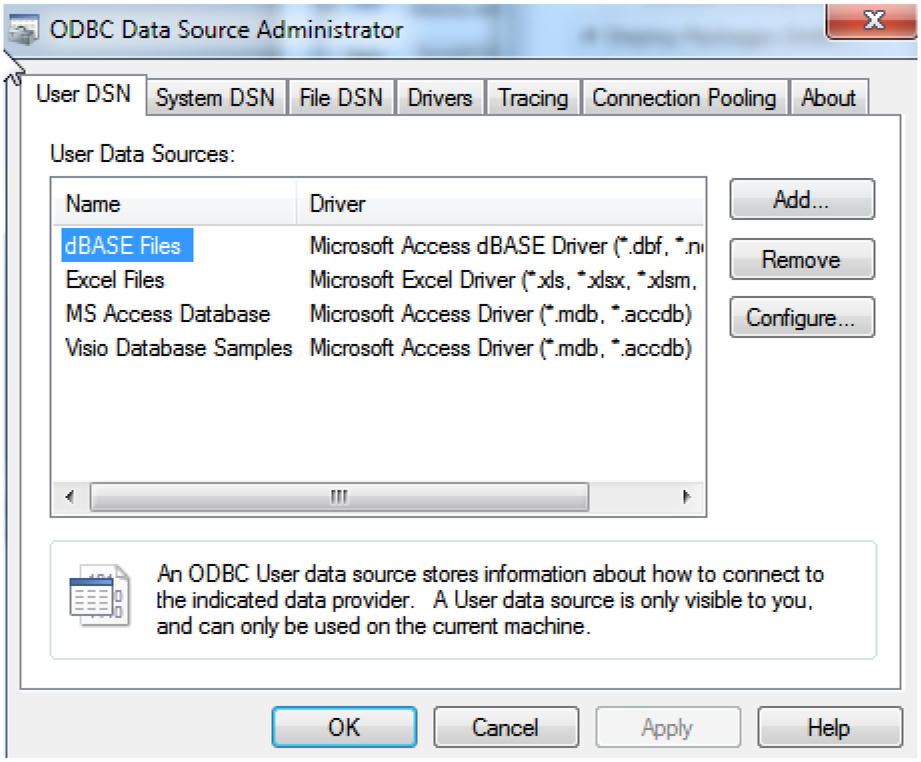
   The Organization ID displays under Organization Properties.



Creating the OBDC Data Source for Windows Platforms

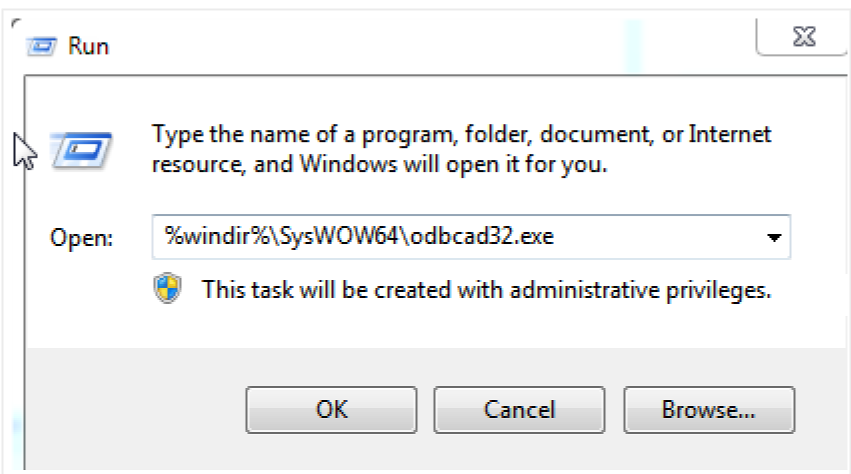
Note: If you are running in a Linux environment, you must install the iODBC driver manager. For more information, refer to the Linux documentation for your version of Linux.

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.**



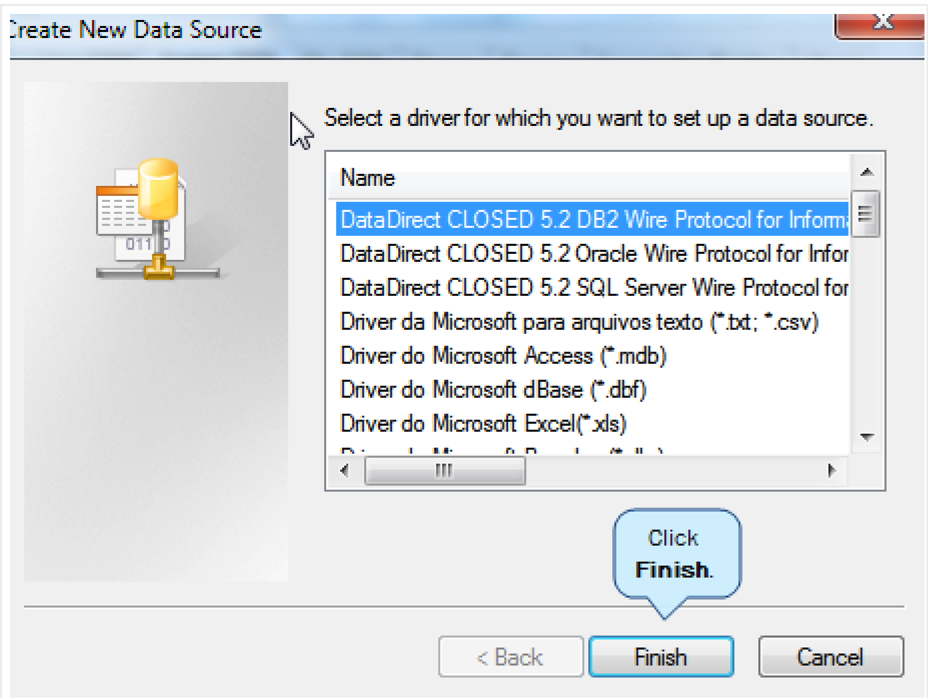
— OR —

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.



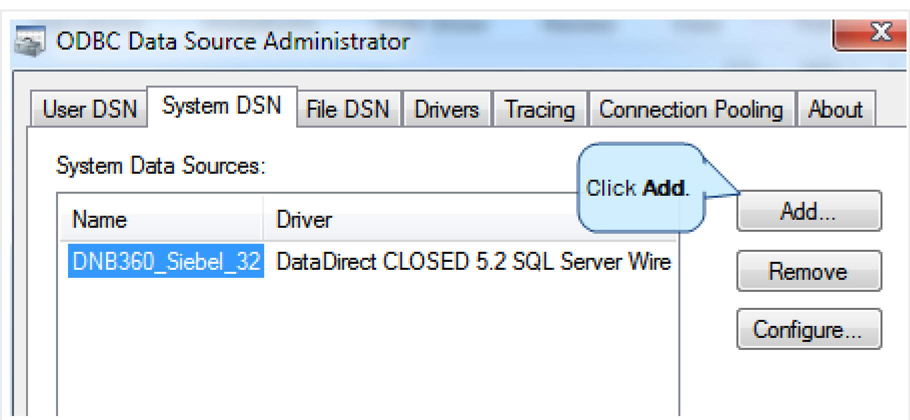
5. To connect to the Siebel database, in the **Create New Data Source** window, depending on your platform, select either one of these DataDirect CLOSED Wire Protocol for Informatica drivers:, and then click **Finish.**

   - DB2
   - Oracle
   - SQL Server

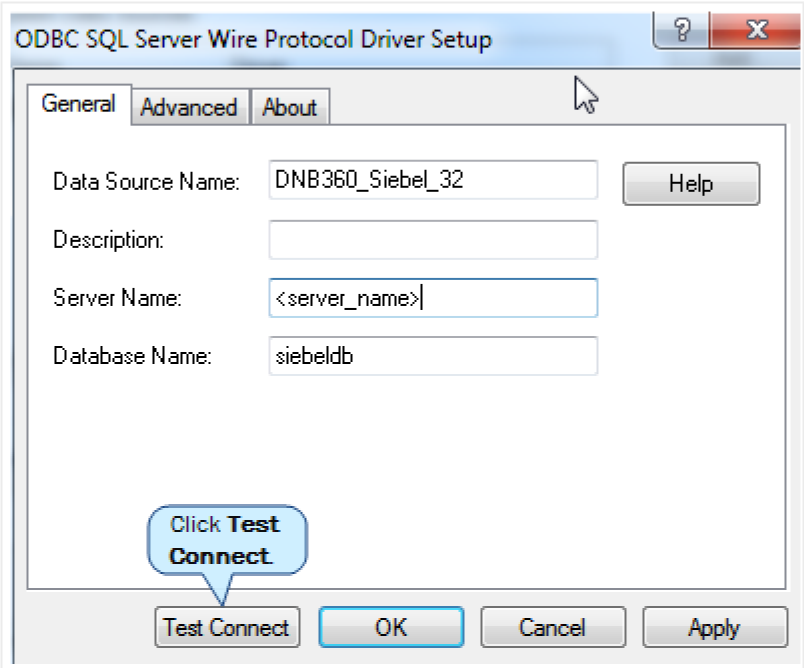


6. To complete the data source configuration, In the **OBDC Data Source Administrator** window, click the **System DSN** tab

7. Select **System Data Source** name **DNB360_Siebel_32**, and then click **Add.**



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



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

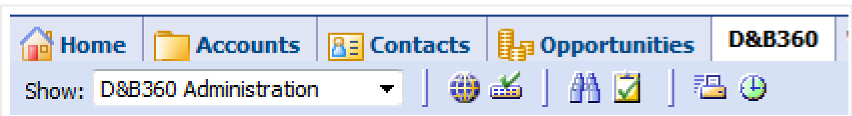
Chapter 7: Establishing Permissions for Roles Within D&B360

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.

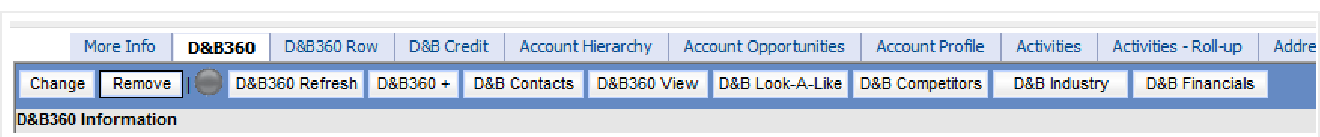
2. In the **Show** area, select **D&B360 Administration**.



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

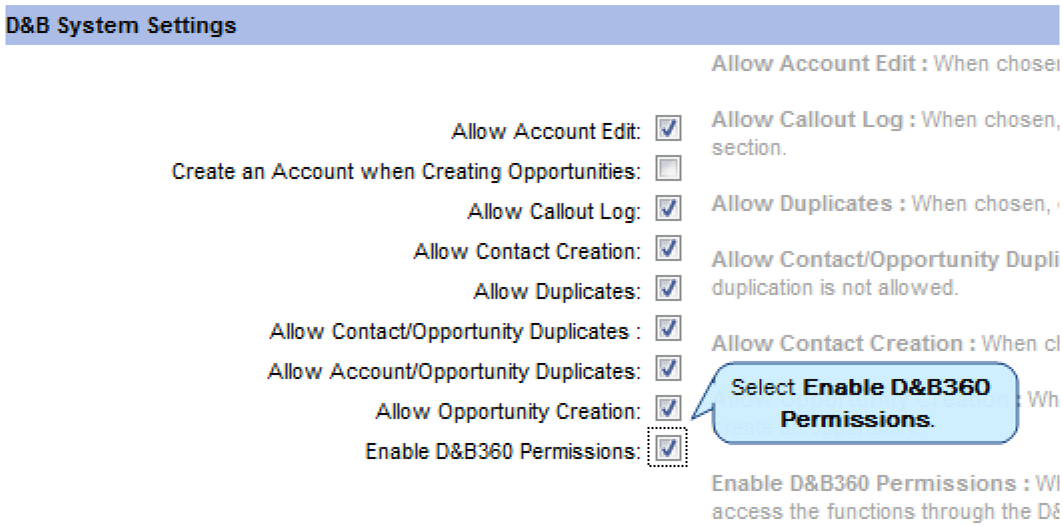
3. In the **D&B360 Administration** window, **Button Configuration** area, click the tab whose features you want to set.

These menu items will display on the user interface



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

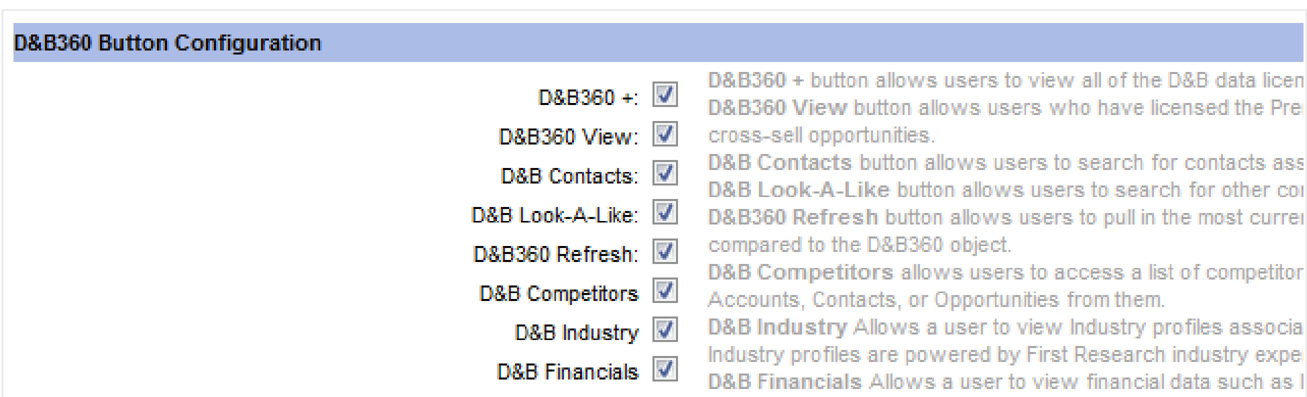
Note: All features are enabled by default. To remove a feature, clear its check box.



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

   — or —

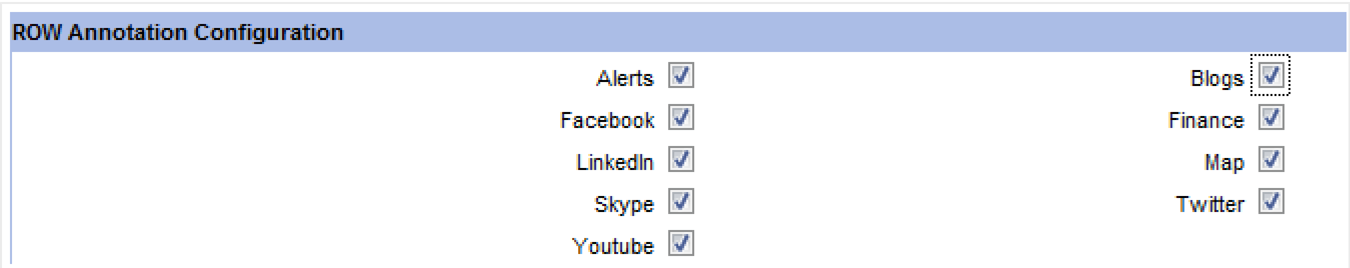
   To prevent a button from displaying, clear its check box.



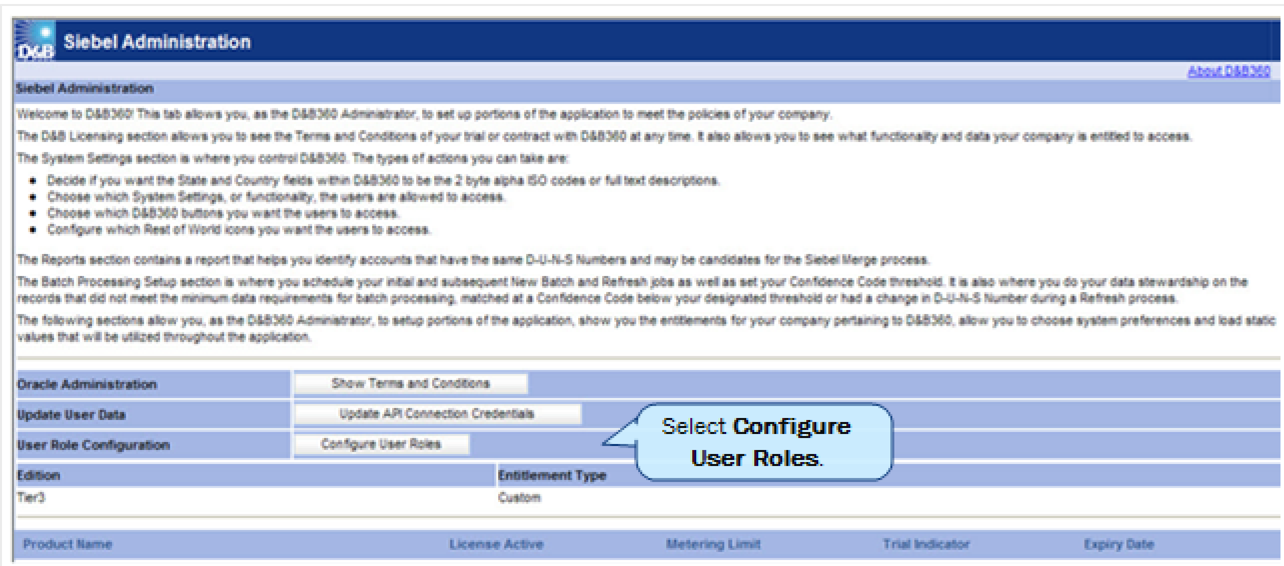
6. In the D&B360 **ROW Annotation Configuration** area, to specify which ROW features to display, select the corresponding check boxes.

   — or —

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



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

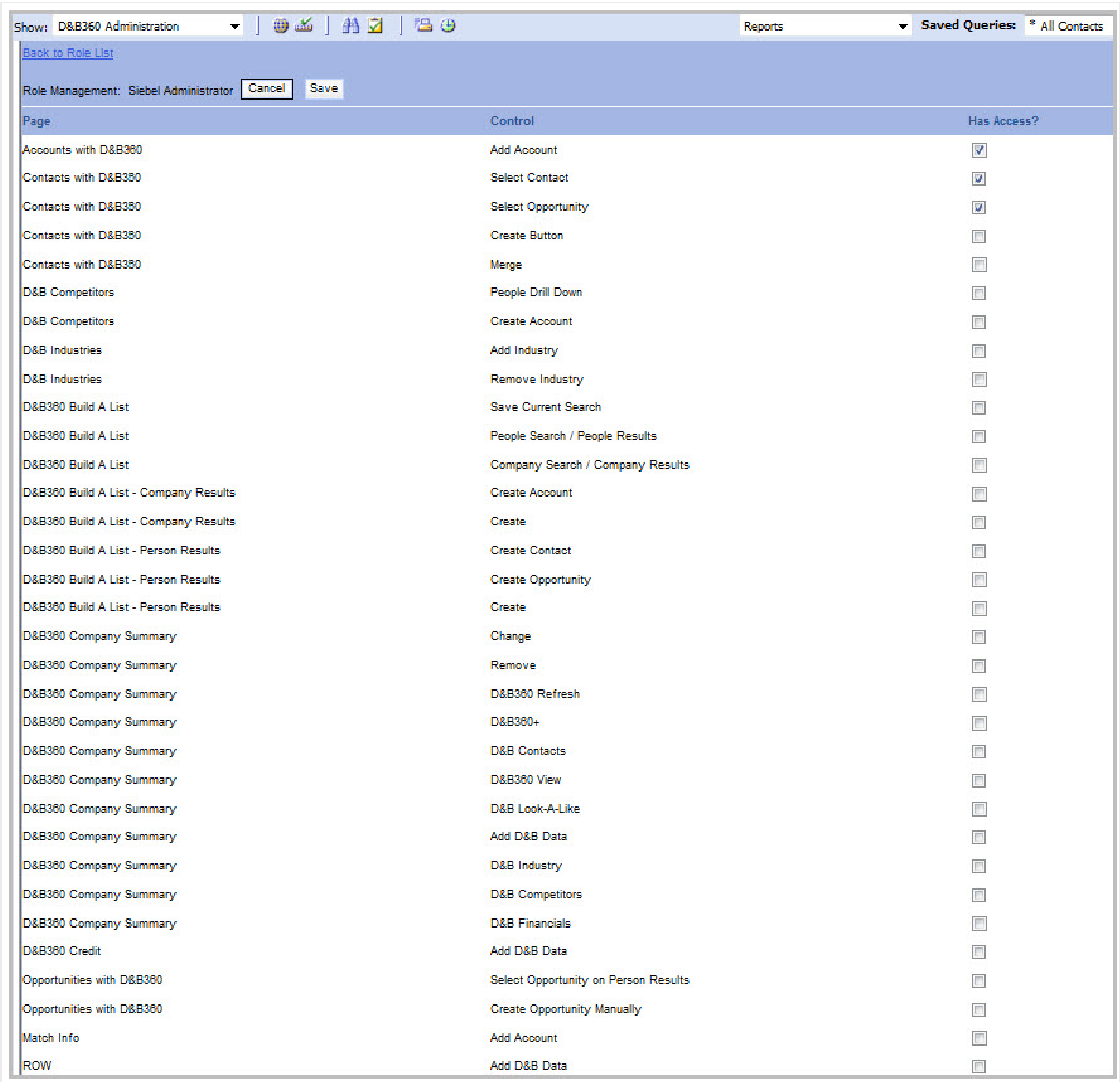


8. In the **Role List** window, select the role you want to edit and click **Edit.**

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

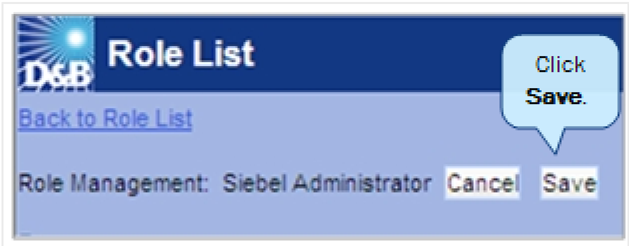
   — or —

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

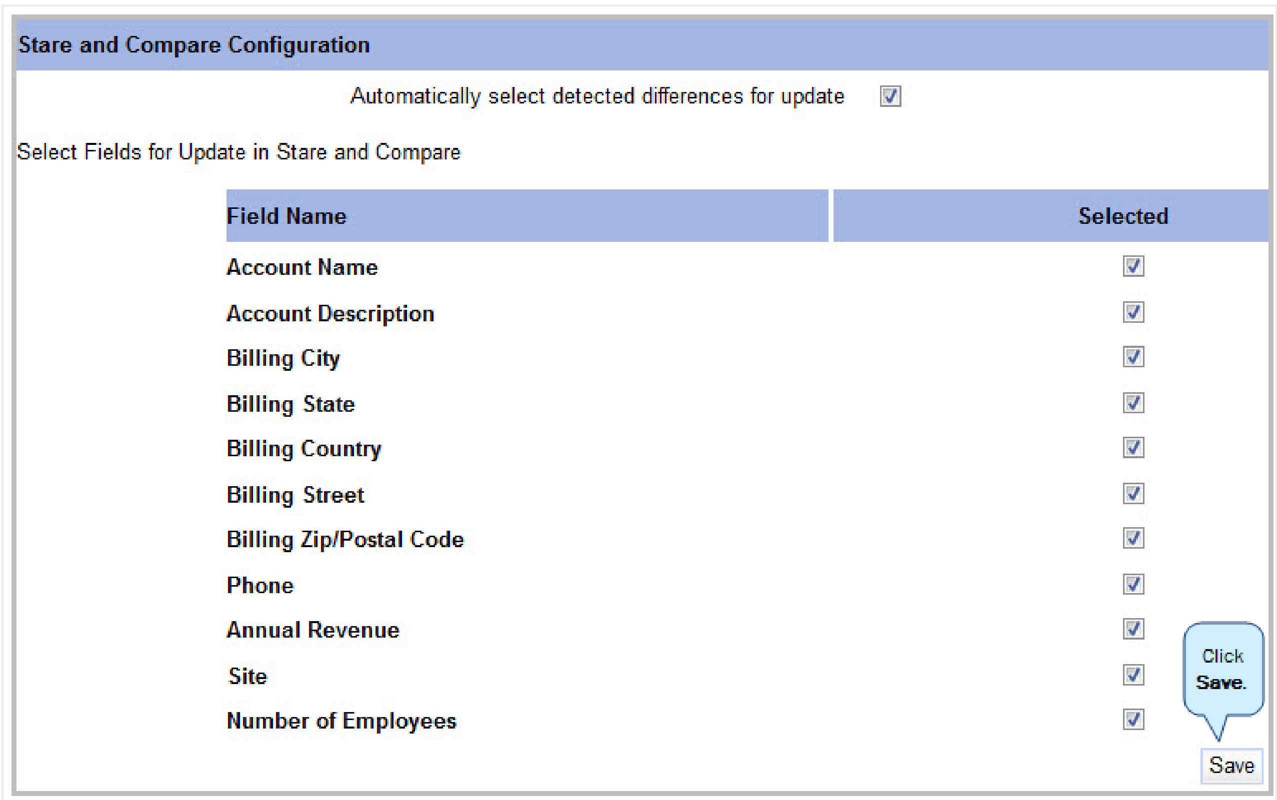


Page	Control	Has Access?
Accounts with D&B360	Add Account	☑
Contacts with D&B360	Select Contact	☑
Contacts with D&B360	Select Opportunity	☑
Contacts with D&B360	Create Button	☐
Contacts with D&B360	Merge	☐
D&B Competitors	People Drill Down	☐
D&B Competitors	Create Account	☐
D&B Industries	Add Industry	☐
D&B Industries	Remove Industry	☐
D&B360 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&B360 Build A List - Company Results	Create Account	☐
D&B360 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	☐

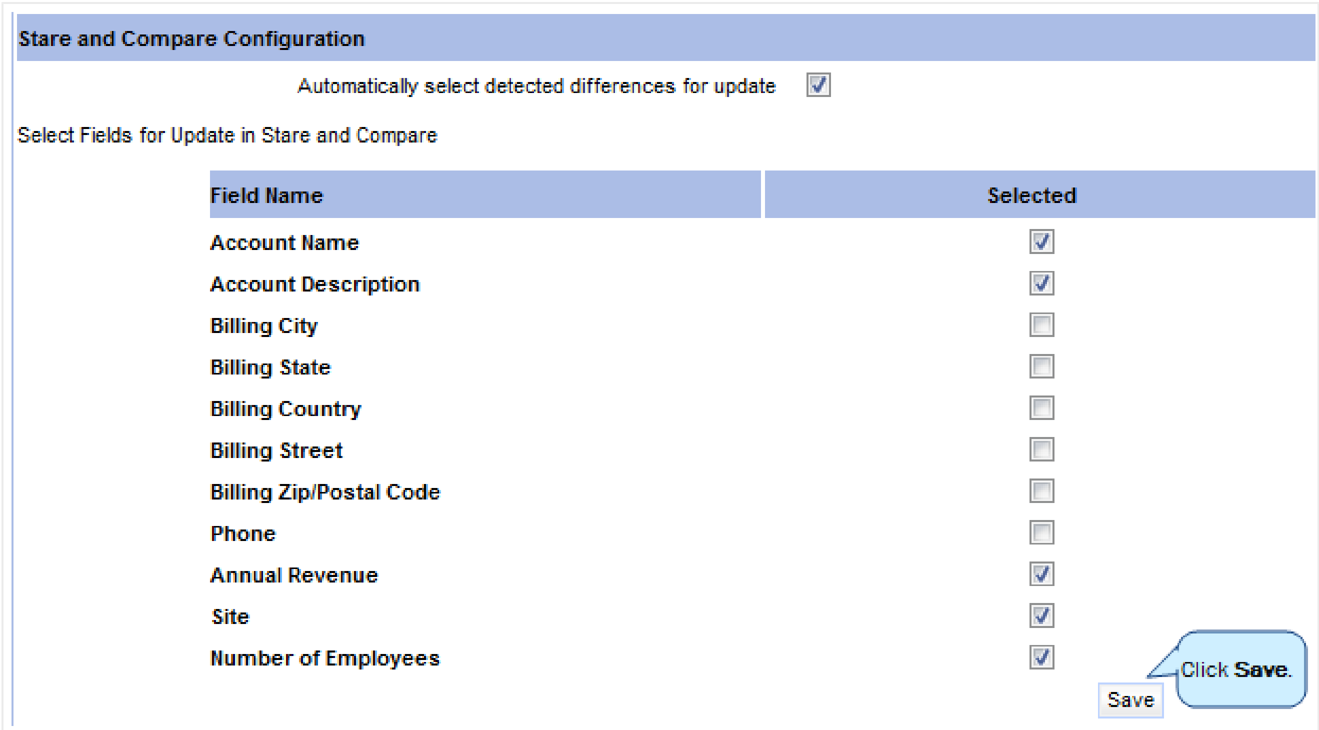
10. In the **Role List** window, click **Save**.



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



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.**



Chapter 8: Managing Batches

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

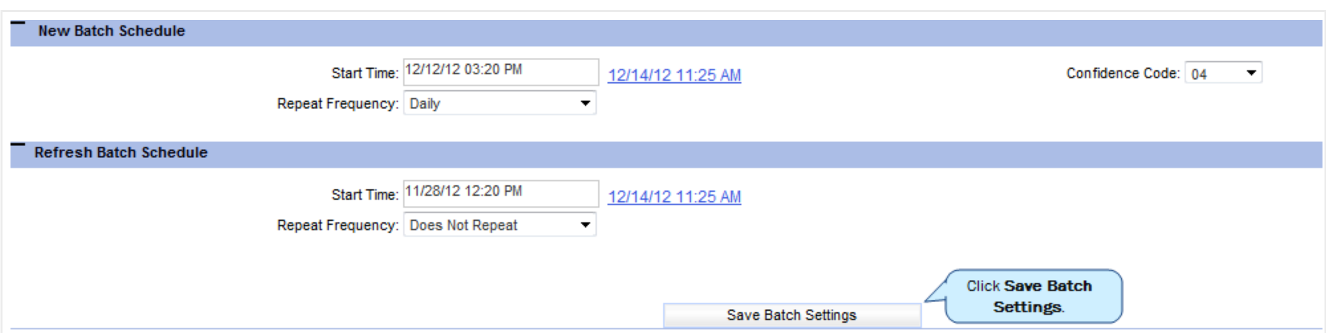
Each batch job has its own distinct schedule:

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**.



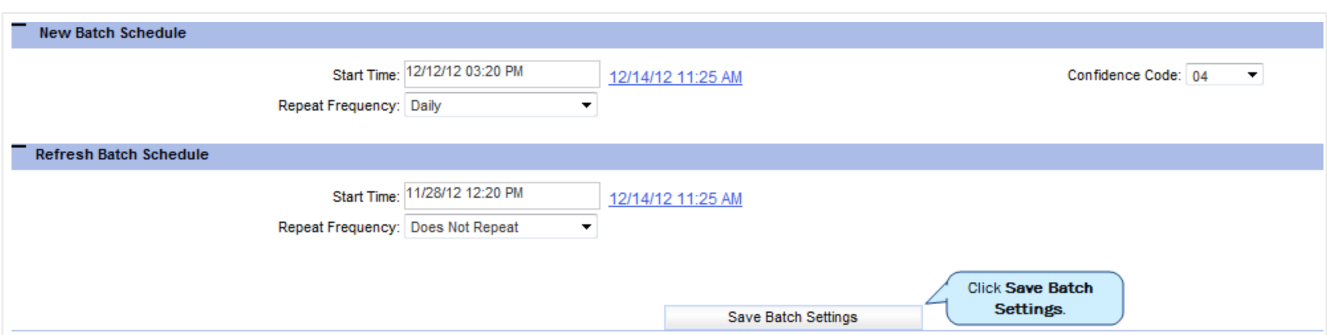
Repeat Frequency				
	Does Not Repeat	Daily	Weekly	Monthly
Run the Task	Select Start Time and Date	Select Every day or Every weekday	Select the day of the week	• Select Day of the month, or • Select the first, second, third, fourth, or last day of every month
Repeat Options	N/A	• Select Repeat indefinitely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

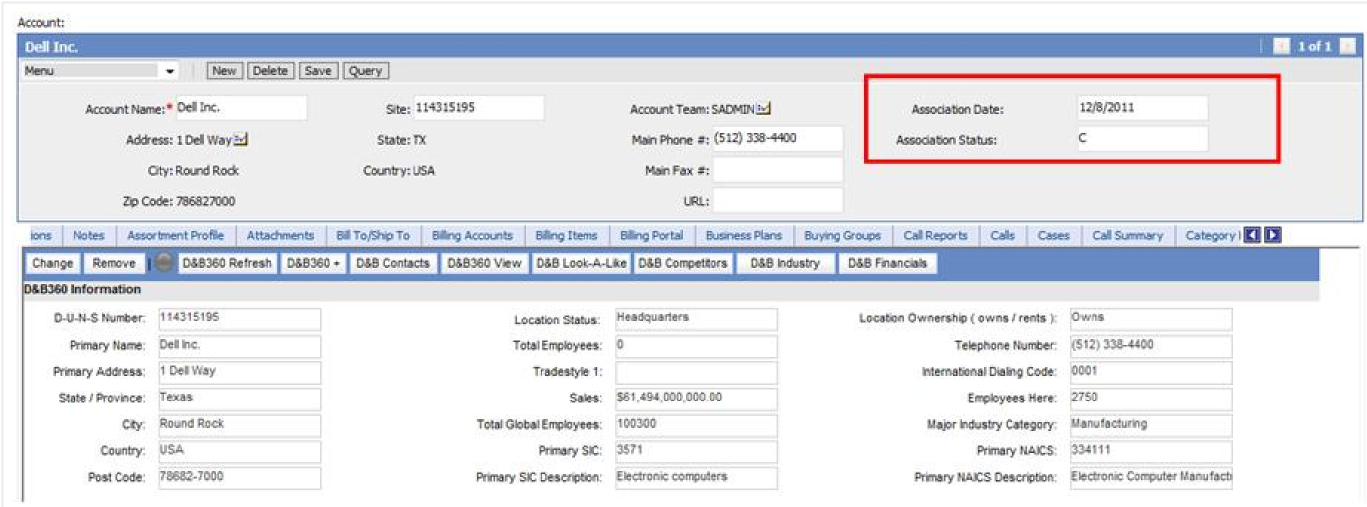
1. In the **Refresh Batch Schedule** area, enter the **Start Time** (date and time) for a refresh batch.
2. In the **Confidence Code** field, select from 1 to 10. The default is **8.** We recommend using a relatively high confidence code.
3. In the **Repeat Frequency** area, use the menu to specify how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



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

Expanding Your Reporting Options

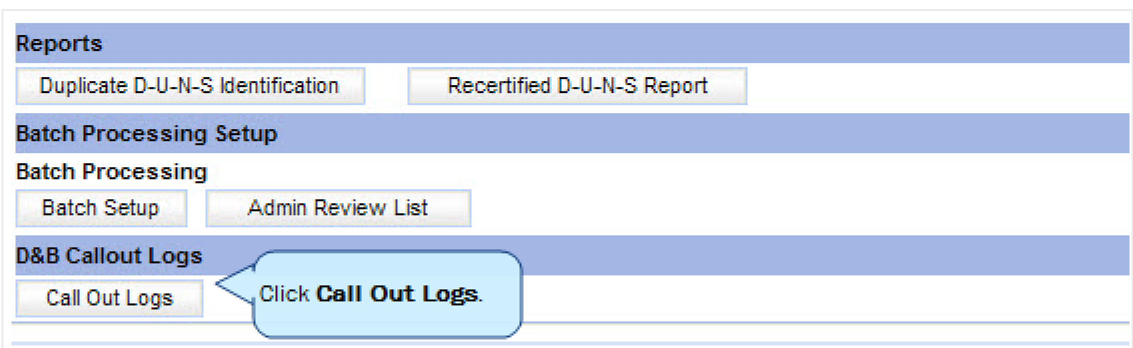
In the Siebel CRM, you can design reporting features based on specific information. D&B360 includes two fields that you can add to a record — the Association Date and the Association Status. These are shown in the following illustration.



Viewing Callout Logs

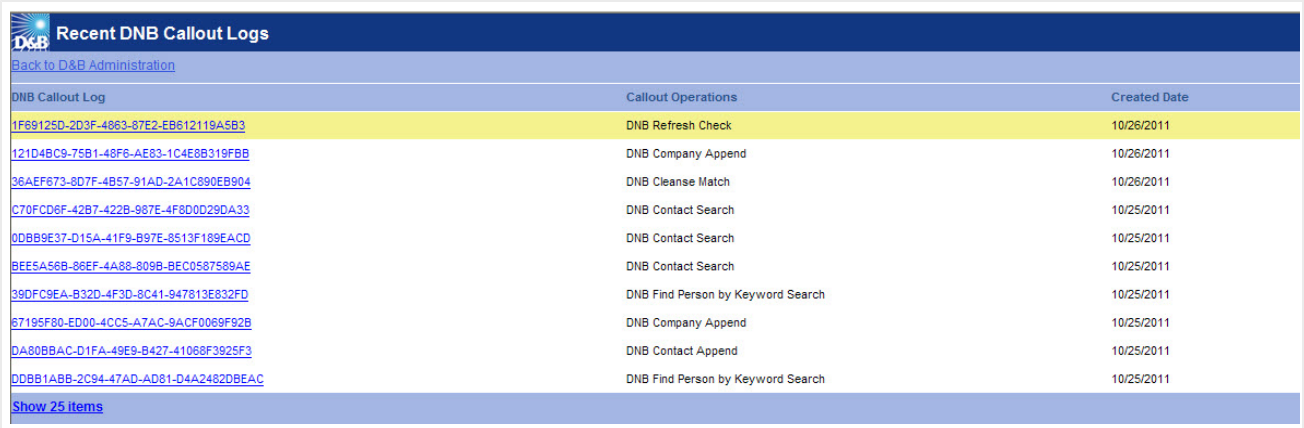
The callout log tracks all web service definition language (WSDL) calls that occur between your CRM system and D&B.

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



2. 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.



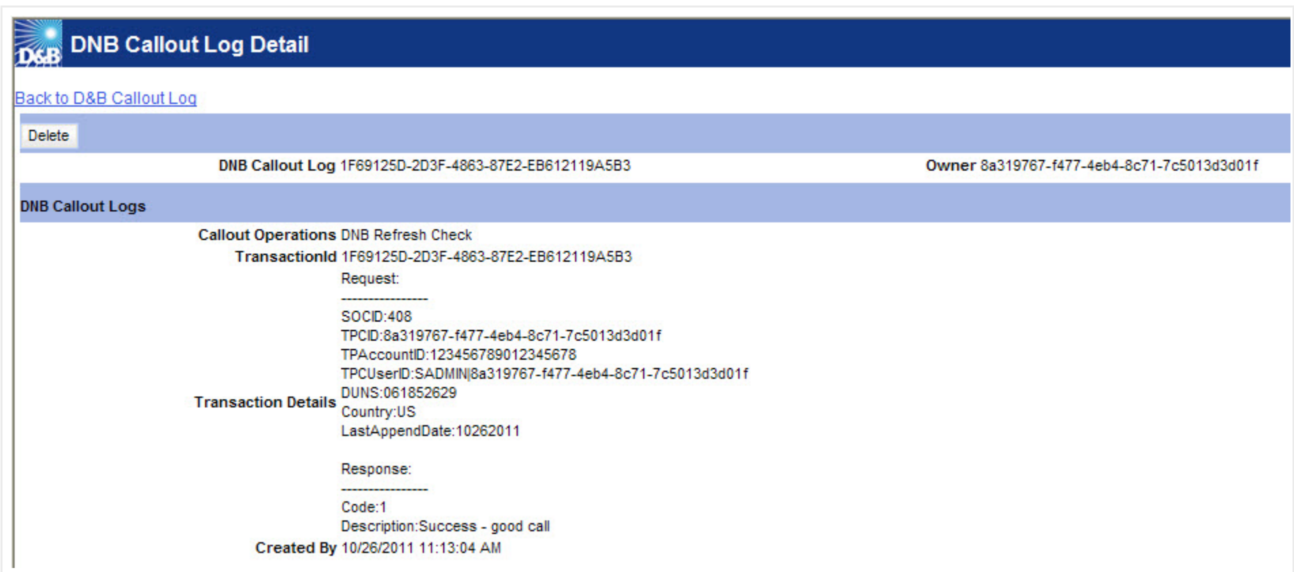
Recent DNB Callout Logs

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 1F69125D-2D3F-4863-87E2-EB612119A5B3 Owner 8a319767-f477-4eb4-8c71-7c5013d3d01f

DNB Callout Logs

Callout Operations DNB Refresh Check
TransactionId 1F69125D-2D3F-4863-87E2-EB612119A5B3
Transaction Details
Request:

SOCID:408
TPCID:8a319767-f477-4eb4-8c71-7c5013d3d01f
TPAccountID:123456789012345678
TPCUserID:SADMIN|8a319767-f477-4eb4-8c71-7c5013d3d01f
DUNS:061852629
Country:US
LastAppendDate:10262011

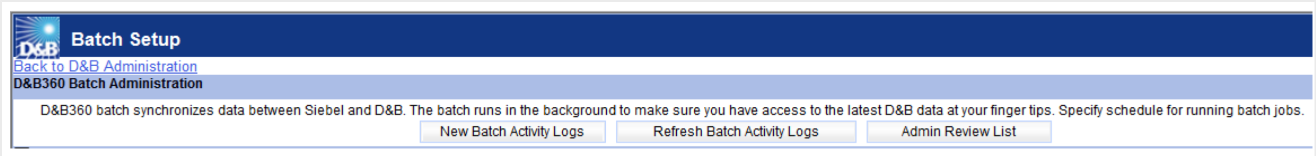
Response:

Code:1
Description:Success - good call
Created By 10/26/2011 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**.



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:

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
3/26/2012 6:36:39 PM	3/26/2012 7:53:36 PM	Received	214	0	214	0	0	
3/20/2012 8:11:32 PM	3/23/2012 8:03:30 PM	Received	433	4	428	0	0	
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	

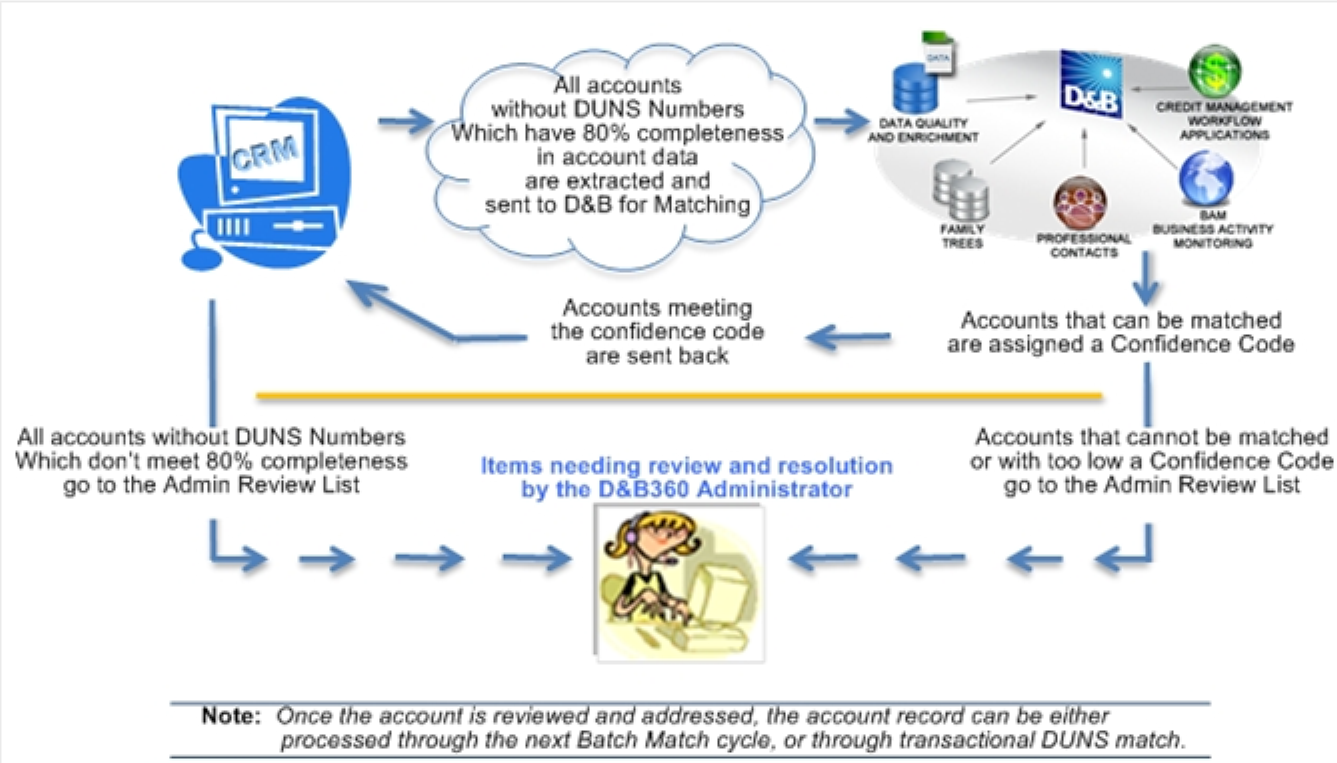
Viewing and Processing Failed Batch Records in the Admin Review List

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.

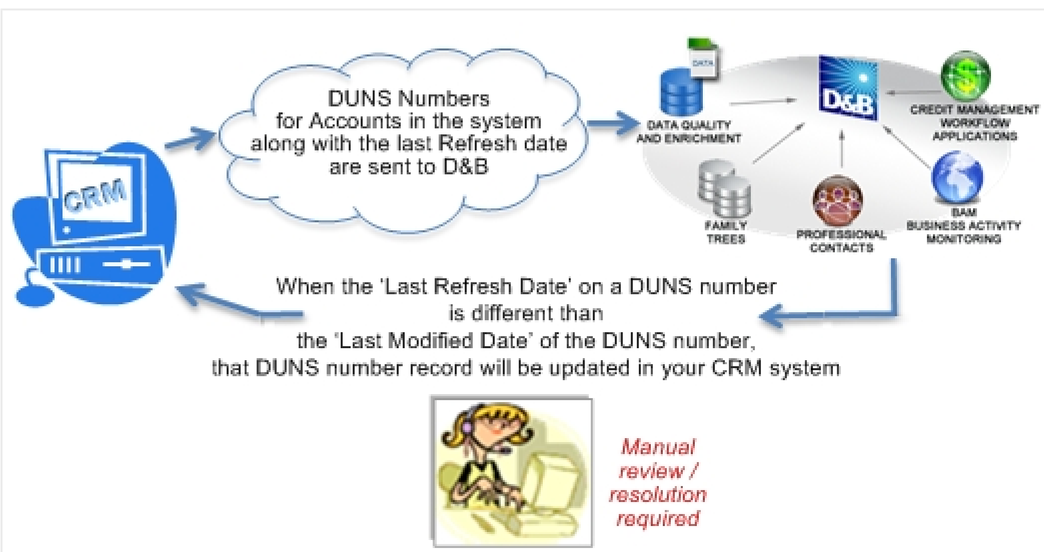
When the information is returned from D&B, most of the accounts will have been matched with D-U-N-S Numbers. Some accounts will be sent to the Admin Review List for one of the following reasons:

- 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

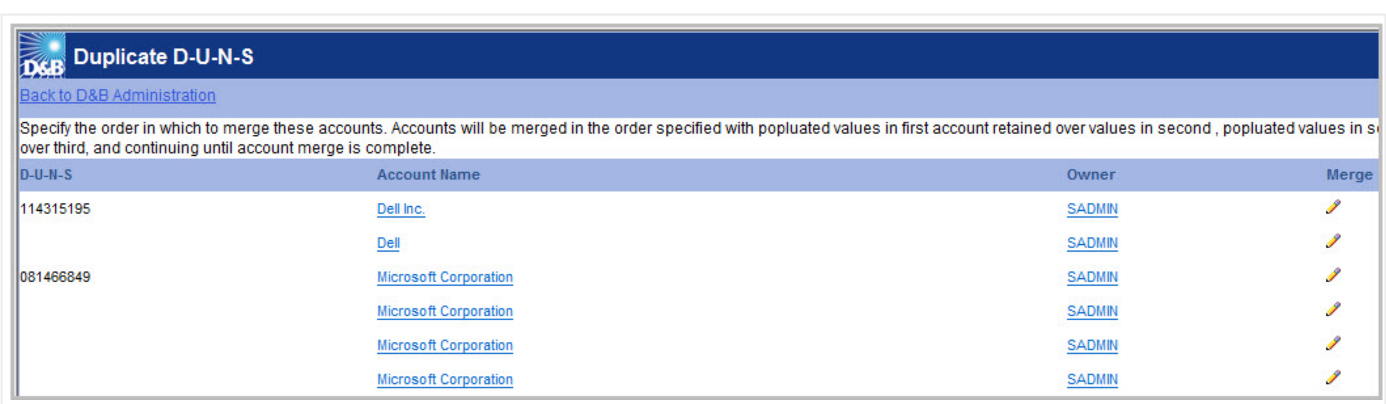
The tier level of your license agreement determines the type of access you have:	
Tier 1	Access to report, but unable to merge accounts.
Tier 2	Access to report, and can merge accounts.
Tier 3	Access to report, can merge accounts, and can prevent duplicates from being created at all (see "Considerations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



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	M	D-U-N-S Number changed due to a Merger or Acquisition.
222121	NICO SRL	01/01/2011	C	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)

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 Communication	SLA Determined with the customer. 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: http://dnbus.force.com/support?prod=dnb360. 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 tables in your database:

Table Name	Purpose	Type
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.

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