



DUN & BRADSTREET

# D&B360 Batch for MS Dynamics CRM (2011 and 2013)

*Informatica Upgrade Guide*

D&B®, Dun & Bradstreet®, DUNSRight® Quality Process, D-U-N-S® Number, www.dnb.com®, WorldBase® and the D&B logo are registered marks in the U.S., and in other countries, of Dun & Bradstreet, Incorporated.

D&B360 is a trademark(s) or registered trademark(s) 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.

© Dun & Bradstreet, Inc. 2015. All rights reserved.

## ABOUT DUN & BRADSTREET

Dun & Bradstreet (NYSE: DNB) grows the most valuable relationships in business. By uncovering truth and meaning from data, we connect customers with the prospects, suppliers, clients and partners that matter most, and have since 1841. Nearly ninety percent of the Fortune 500, and companies of every size around the world, rely on our data, insights and analytics. For more about Dun & Bradstreet, visit [DNB.com](http://DNB.com).

# Contents

---

<b>About this Guide.....</b>	<b>iv</b>
Audience and Purpose.....	iv
Conventions.....	iv
Navigating in the PDF.....	iv
<b>Introduction.....</b>	<b>1-1</b>
<b>Pre-Upgrade Steps.....</b>	<b>2-1</b>
Step 1: Back Up the Configuration Files.....	2-1
Step 2: Ensure the Informatica Secure Agent is Up and Running.....	2-2
Step 3: Ensure the Latest D&B360 Version is Installed.....	2-4
<b>Post Upgrade Steps.....</b>	<b>3-1</b>
Step 1: Obtain the Organization ID.....	3-1
Step 2: Adapt Your Organization Folder.....	3-4
Step 3: Install Microsoft Visual C++ 2008 Redistributable Package (x86).....	3-7
Step 4: Install Microsoft Visual C++ 2010 Redistributable Package (x86).....	3-8
Step 5: Download the Latest Java Security Policy.....	3-10
Step 6: Copy the Configuration Files.....	3-11
Step 7: Restart the Secure Agent.....	3-12

# About this Guide

---

## Audience and Purpose

This guide is for D&B360 Batch for MS Dynamics CRM (2011 and 2013) installers who are preparing for the Informatica upgrade.

## Conventions

**NOTE:** Notes mean *reader take note* and provide helpful suggestions.

**IMPORTANT:** 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 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**.

# Introduction

---

We are very excited to announce that we are upgrading our Batch infrastructure to meet your requirements in a better way. That's why, in the upcoming days, we are going to be upgrading the Informatica Platform to the latest release.

This step-by-step guide will walk you through the required set of steps to prepare for the Informatica Upgrade. You should follow these steps if you are using D&B360 Batch functionality. Not doing so may result in the malfunctioning of the D&B360 Batch Match and Refresh process.

If you need help or have any questions, contact the D&B360 Support Team by opening a support ticket using the following link:

<http://dnbus.force.com/support?prod=DNB360>

# Pre-Upgrade Steps

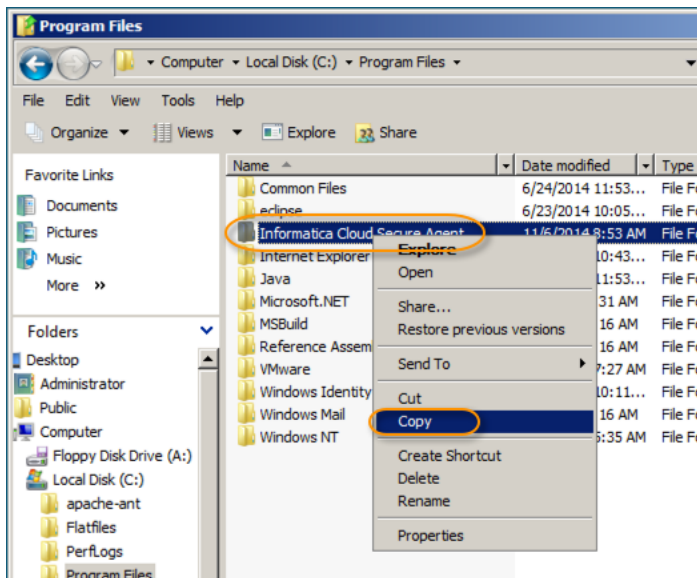
Pre-upgrade steps should be completed before May 1, 2015, prior to the Informatica platform upgrade.

These steps are required to ensure a successful Informatica Secure Agent upgrade.

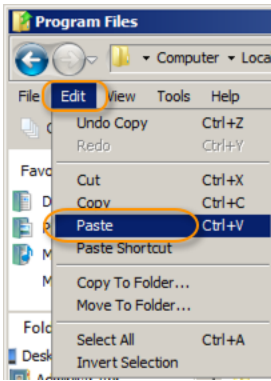
## Step 1: Back Up the Configuration Files

Backup the entire Informatica Cloud Secure Agent folder before. Locate this folder on Program Files (x86) \Informatica Cloud Secure Agent if your Secure Agent is installed on a 64 bit machine.

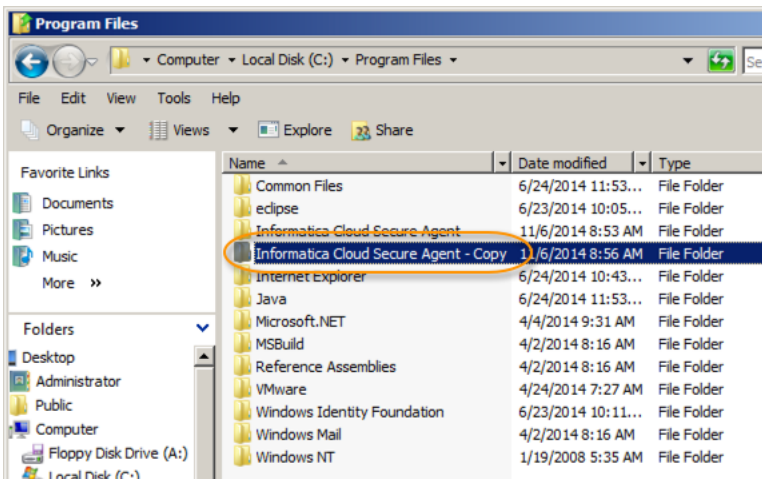
1. Select the folder, right click on it and select Copy.



2. From the Menu, choose Edit and Paste or right-click and Paste on the Windows Explorer window.



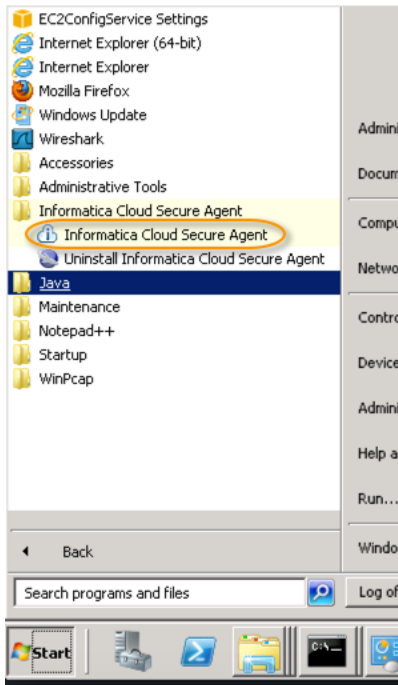
You should now have a new folder, Informatica Cloud Secure Agent – Copy.



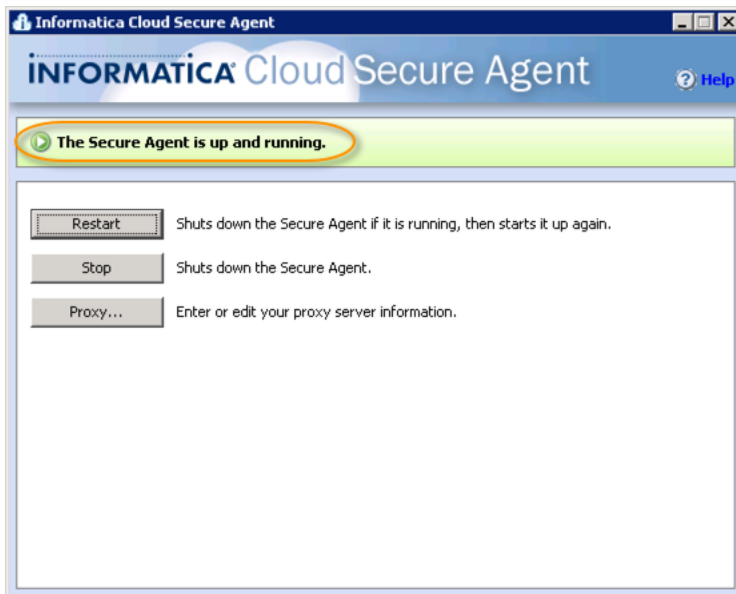
## Step 2: Ensure the Informatica Secure Agent is Up and Running

During the upgrade process, it is important that the Secure Agent is up and running to receive the upgrade instructions sent by the Informatica Cloud infrastructure.

1. On your Secure Agent machine, open the Informatica Cloud Secure Agent by opening Start > All Programs > Informatica Cloud Secure Agent > Informatica Cloud Secure Agent. The Informatica Cloud Secure Agent Console opens.



2. Verify that the agent is up and running.



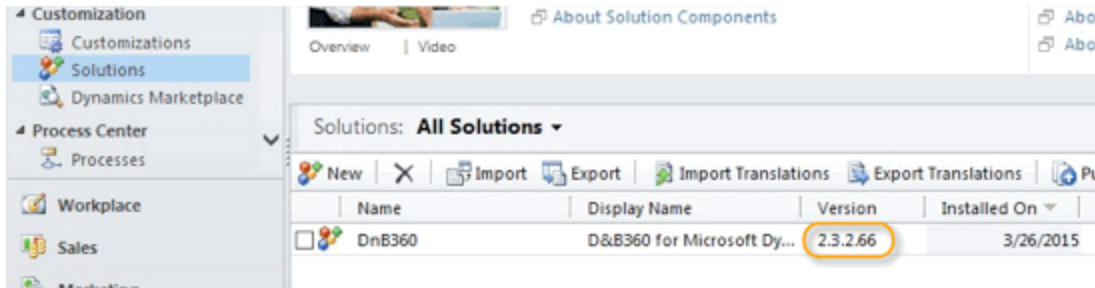
3. If you do not see the message, The Secure Agent is up and running, click Restart.

**NOTE:** Sometimes the Agent console is not visible depending upon who installed agent. If this is the case, view the status in Windows Services.

## Step 3: Ensure the Latest D&B360 Version is Installed

If you have the D&B360 2.3.1 version installed in your system it is mandatory that you upgrade to the latest version.

1. You can check what version is installed in your system by going to Settings > Customization > Solutions and identifying the version of the DnB360 Solution.



2. If the version is not 2.3.2.66 or higher, please download and install the latest version.

# Post Upgrade Steps

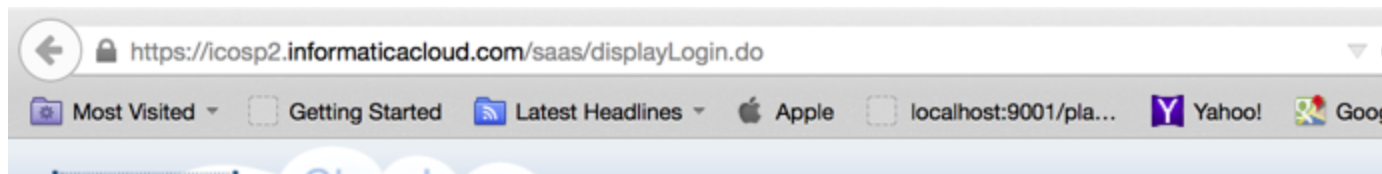
The following steps may be performed beginning, May 4, 2015, once the Informatica platform is upgraded.

Not following these steps will result in the malfunctioning of the D&B360 Batch feature.

## Step 1: Obtain the Organization ID

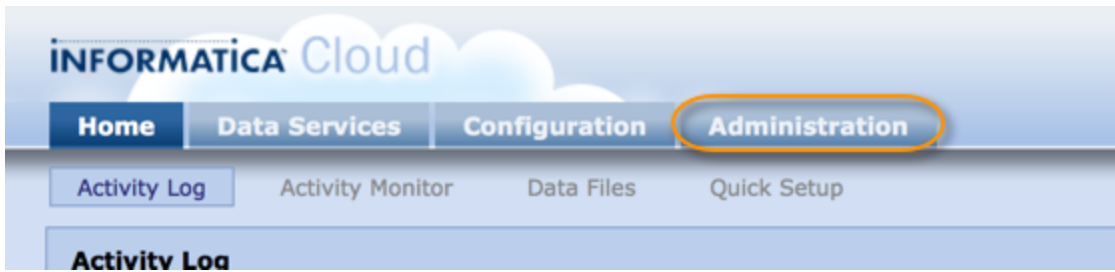
Obtain the ID For D&B360 V3.0)

1. Access the following link: <https://icosp2.informaticacloud.com/saas/displayLogin.do>



2. Enter your User Name and Password and click Login.

3. Click the Administration tab.

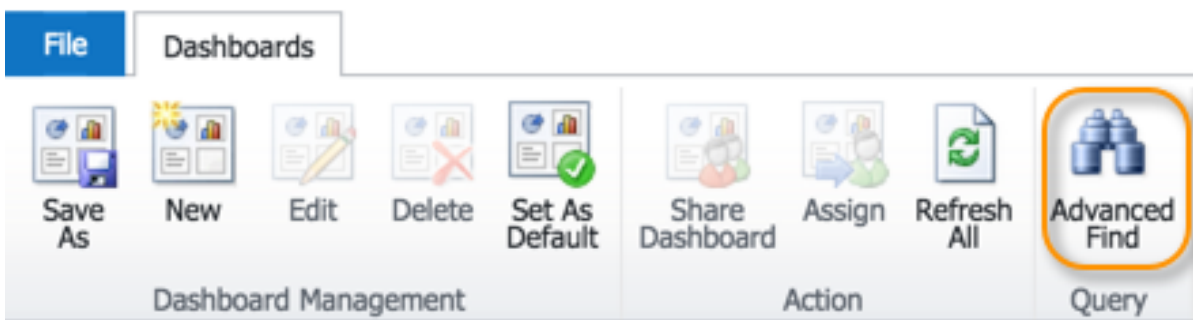


4. Your Organization ID displays on the following page.

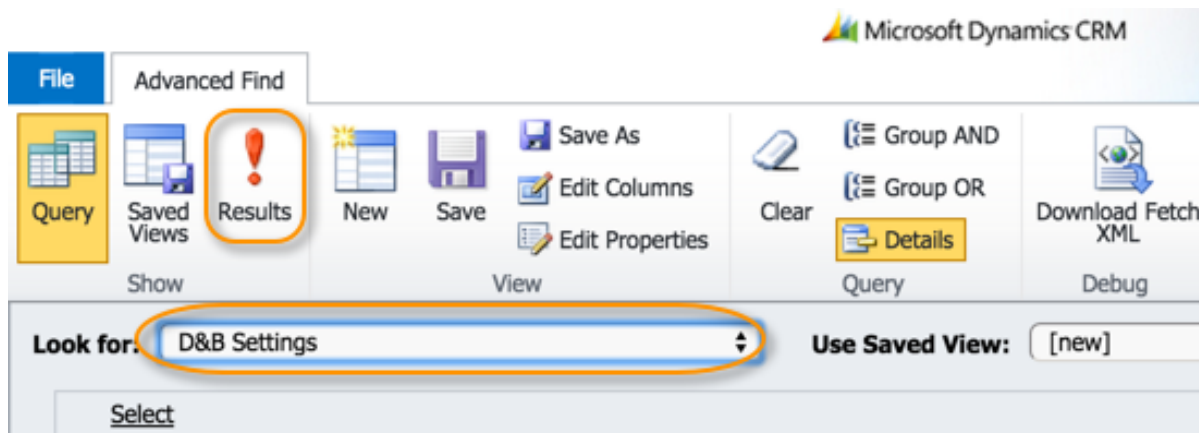


Obtain the ID For D&B360 V2.0)

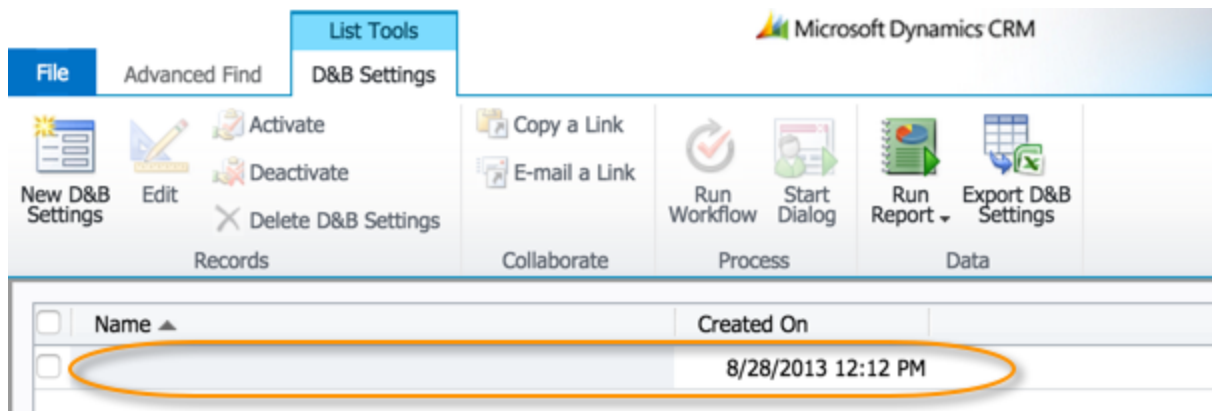
5. Perform an Advanced Find.



6. Look for D&B Settings and click on Results.



7. Double-click on the listed entry.



8. The Informatica Cloud Username and Password display on the Informatica Cloud section of the Information page.

Microsoft Dynamics CRM

Rodrigo Becerri  
DnB360UpcomingRelease

File D&B Settings Customize D&B360

Save Save & Close Deactivate Copy a Link E-mail a Link Run Workflow Start Dialog Run Report

D&B Settings Information

General

Name \*

Callout Timeout 30 seconds Country Description

Country Default United States State Description

Edition Tier2 Link Provided By D&B

Installation Key TPC

SOC 410 Expiration Date 12/31/2015

D&B Trial No Yes

Informatica Cloud

Informatica Cloud Username Informatica Cloud Password

Informatica Cloud Organization Id 102 Informatica Cloud Connection ID 110

## Step 2: Adapt Your Organization Folder

1. Log into the new Informatica Cloud with your old User Name and Password. using the following link:  
<https://icosp2.informaticacloud.com/ma/login>.

informatica Cloud

Log In

User Name: Password:

Log In

Don't have an account?  
Forgot your password?

Release

Currently, 1  
To check th  
If you are €

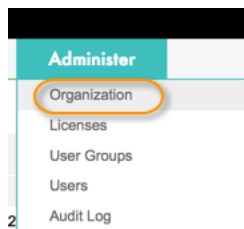
2. Click the Administer tab.

informatica Cloud

Home Monitor Apps Design Configure Administer

Activity Log

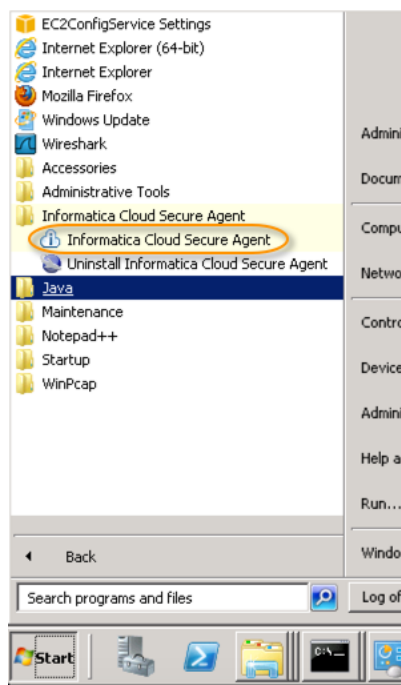
3. Click on the Organization menu option.



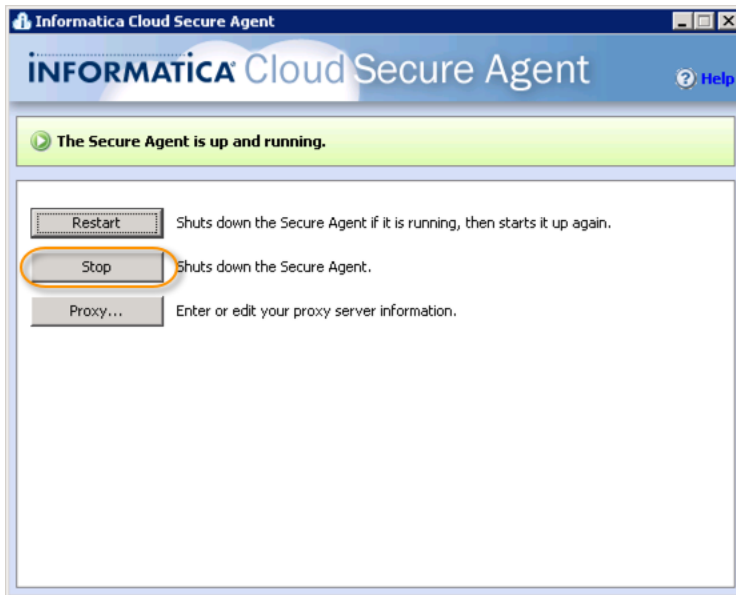
4. Locate and note the new Organization ID (Org000007).



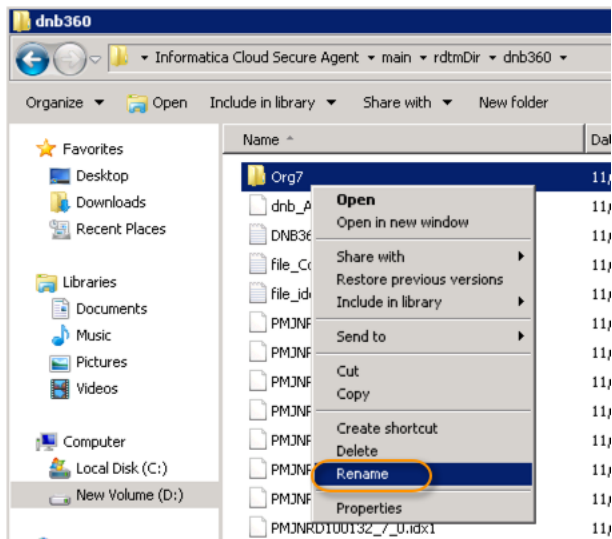
5. On your Secure Agent machine, navigate to the Informatica Cloud Secure Agent by opening Start > All Programs > Informatica Cloud Secure Agent > Informatica Cloud Secure Agent. This will open the Informatica Cloud Secure Agent Console.



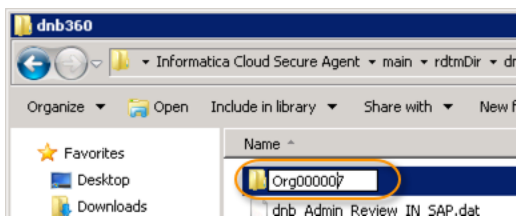
6. Click Stop.



7. Navigate to Program Files (x86)\Informatica Cloud Secure Agent\main\rdtmDir\dnb360 and Rename your Organization folder.



8. Enter the Organization from Step 4 above (Org000007).



## Step 3: Install Microsoft Visual C++ 2008 Redistributable Package (x86)

1. On your Secure Agent machine, please open <http://www.microsoft.com/en-us/download/details.aspx?id=29> and click Download.



### Download Center

Shop ▾ Products ▾ Categories ▾ Support ▾ Security ▾



### Microsoft Visual C++ 2008 Redistributable Package (x86)

Select Language:

English

Download

The Microsoft Visual C++ 2008 Redistributable Package (x86) installs runtime components of Visual C++ Libraries required to run applications developed with Visual C++ on a computer that does not have Visual C++ 2008 installed.

2. Click Run.

Do you want to run or save **vc redistrib\_x86.exe** (1.73 MB) from **download.microsoft.com**?

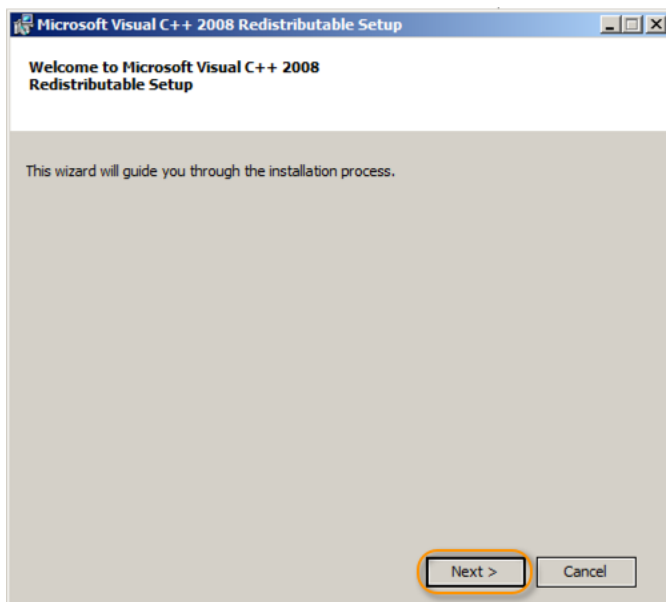
Run

Save

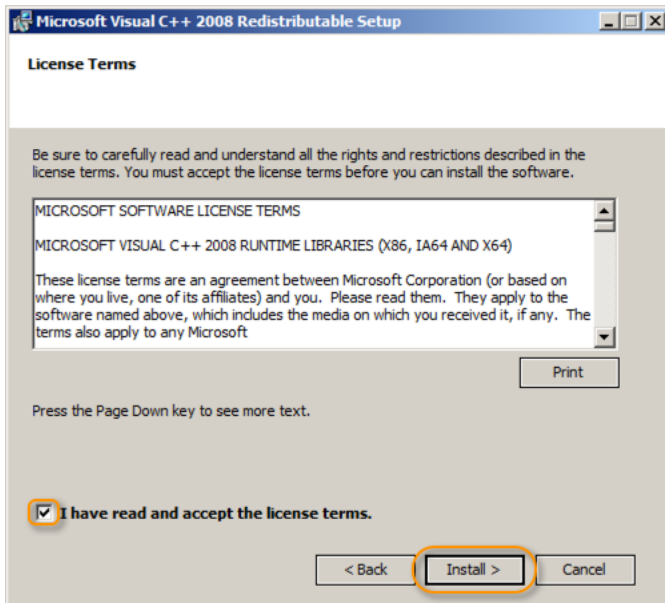
Cancel

×

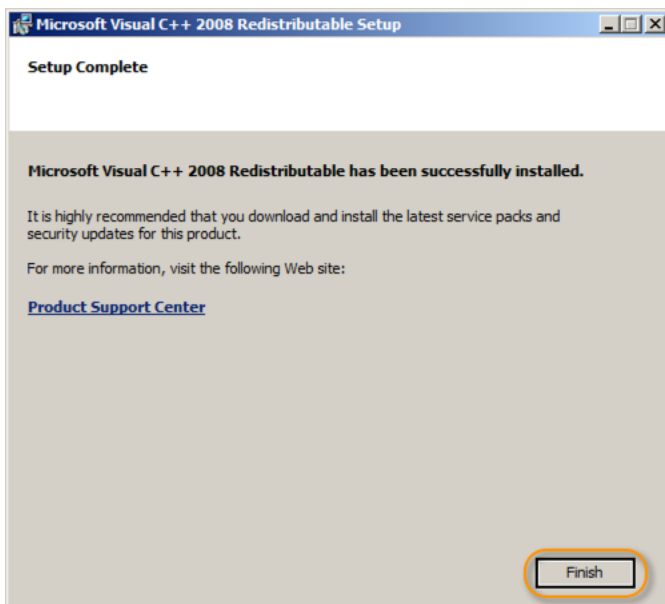
3. Click on Next.



4. Read and accept the license terms by selecting "I have read and accept the license terms". Click Install.



5. When the installer finishes, a summary window displays. Click Finish.



## Step 4: Install Microsoft Visual C++ 2010 Redistributable Package (x86)

1. On your Secure Agent machine, open <http://www.microsoft.com/en-us/download/details.aspx?id=5555> and click Download.

## Microsoft Visual C++ 2010 Redistributable Package (x86)

Select Language:

English

Download

The Microsoft Visual C++ 2010 Redistributable Package installs runtime components of Visual C++ Libraries required to run applications developed with Visual C++ on a computer that does not have Visual C++ 2010 installed.

2. You may be presented with promotional software to download. Click No thanks and continue.

### Microsoft recommends

Select the check box next to any downloads you'd like to add to your queue. After clicking Next, You'll be guided through a simple download process.

☐ **MSN default homepage & Bing default search engine**  
Set MSN as your default homepage and Bing as your default search engine  
Size: 2.1 MB

☐ **Microsoft .NET Framework 4 Client Profile (Web Installer)**  
The Microsoft .NET Framework 4 web installer package downloads and installs the .NET Framework components required to run on the target machine architecture and OS. An Internet connection is required during the installation. The Client Profile is used to run most client applications that target the .NET Framework 4.  
Size: 868 KB

#### Download Summary:

1. Microsoft Visual C++ 2010 Redistributable Package (x86)

Total Size: 4.8 MB

No thanks and continue

3. Click Run.

Do you want to run or save **vcredist\_x86.exe** (4.83 MB) from **download.microsoft.com**?

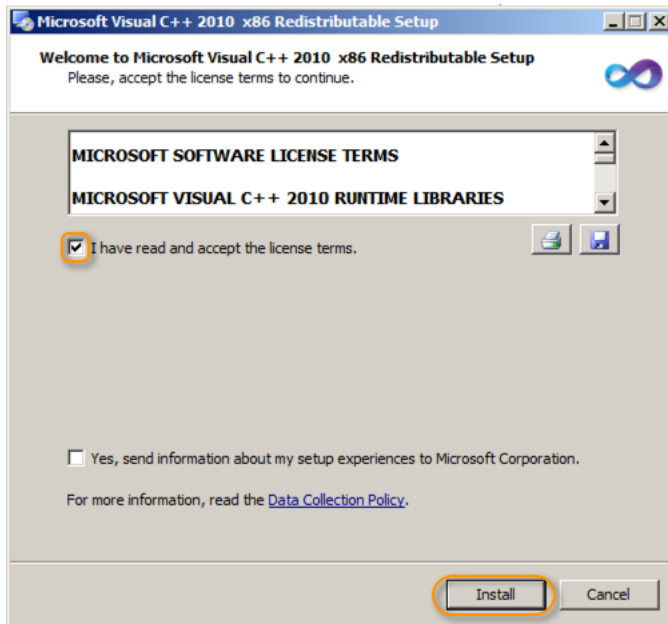
Run

Save

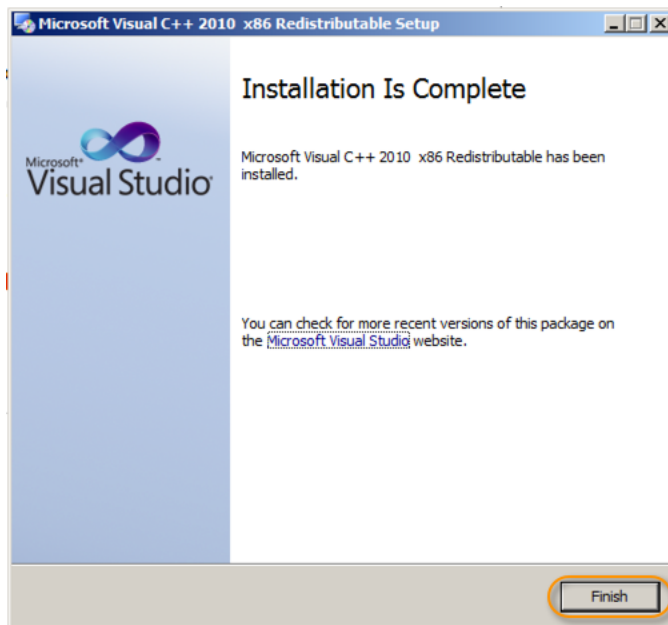
Cancel

×

4. Read and accept the license terms by selecting "I have read and accept the license terms". Click Install.

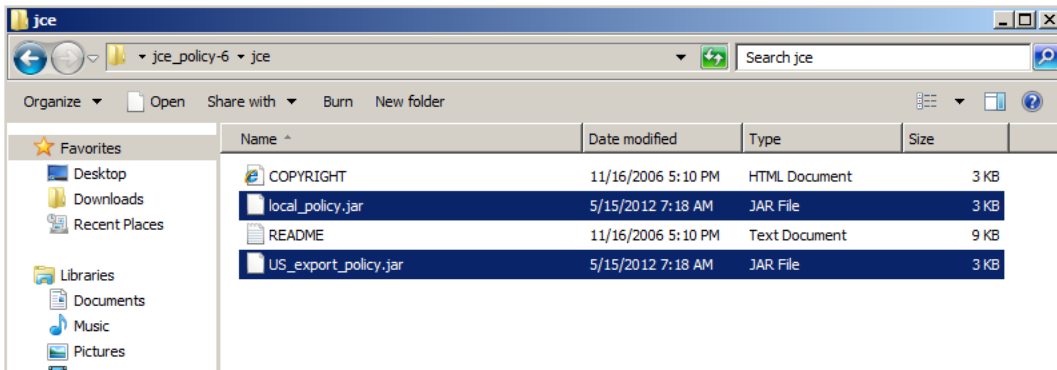


5. At the Installation summary window, click Finish.

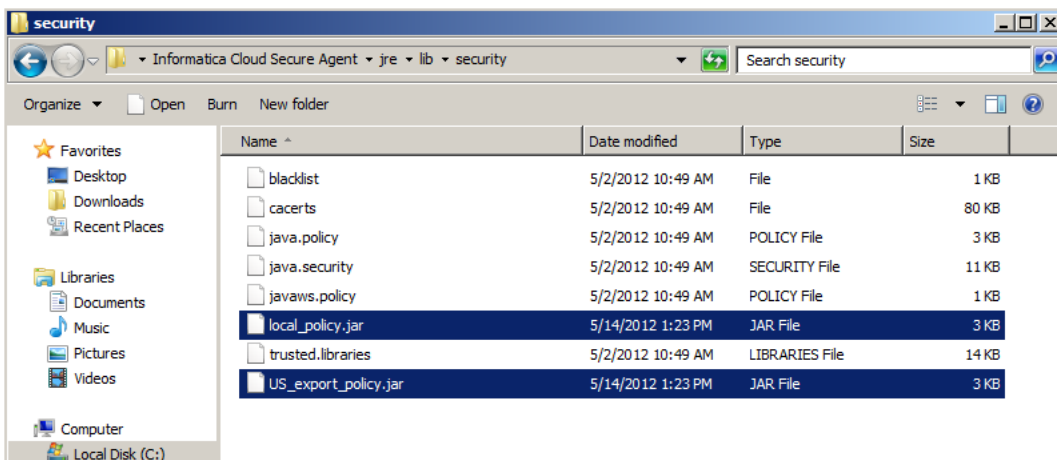


## Step 5: Download the Latest Java Security Policy

1. Download the Java Security Policy Files from <http://www.oracle.com/technetwork/java/javase/downloads/jce-7-download-432124.html>.
2. Unzip the Zip package. .

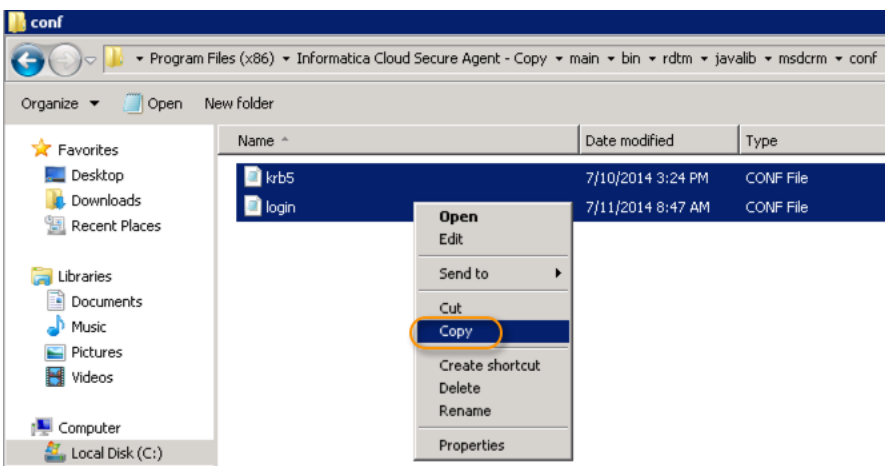


- Copy local\_policy.jar and US\_export\_policy.jar and paste them into the Program Files (x86)\Informatica Cloud Secure Agent\jre\lib\security to overwrite the existing files.

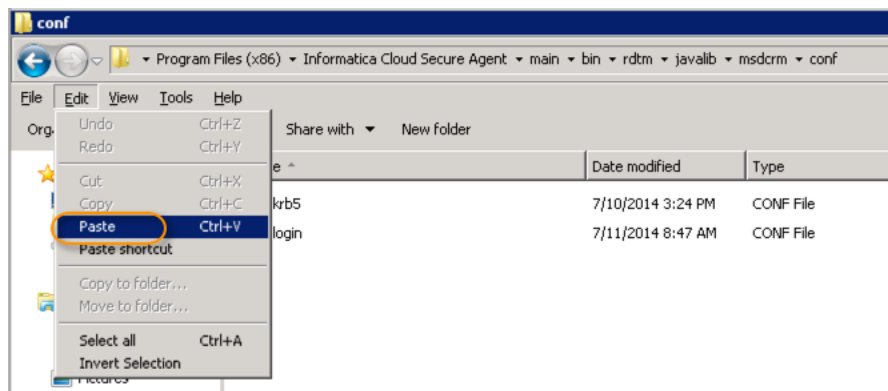


## Step 6: Copy the Configuration Files

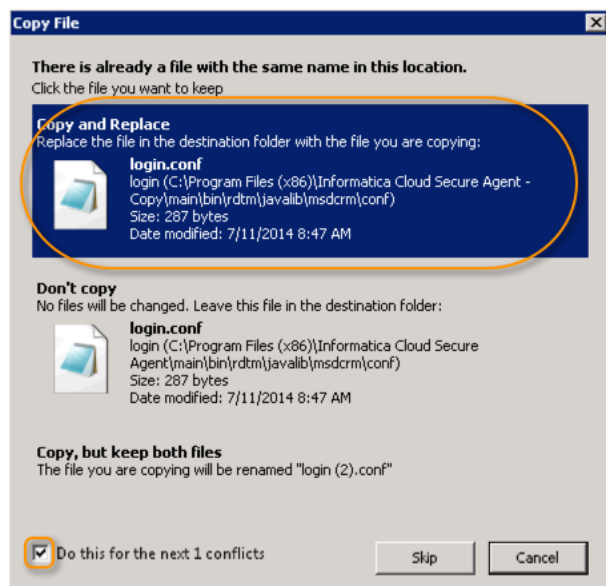
- Navigate to the backup folder created in the Pre-Upgrade steps (Program Files (x86)\Informatica Cloud Secure Agent – Copy\main\bin\rdtm\javalib\msdcrm\conf). Copy the krb5.conf and login.conf files.



- Navigate to Program Files (x86)\Informatica Cloud Secure Agent\main\bin\rdtm\javalib\msdcrm\conf and Paste the files.

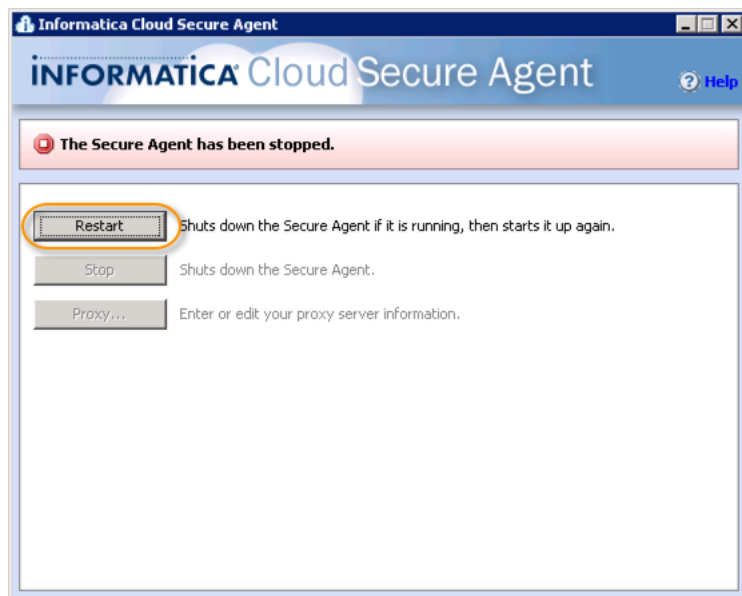


3. If prompted, Copy and Replace the files.



## Step 7: Restart the Secure Agent

Once all the required prep steps have been performed, open the Informatica Cloud Secure Agent console and click on Restart.



Congratulations! You have successfully upgraded your secure agent.



Dun & Bradstreet  
103 JFK Parkway  
Short Hills, N.J. 07078

[www.dnb.com](http://www.dnb.com)