

DNBi Product Tours

Core Admin - Tour

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1. DNBI Overview

DNBI is an interactive, customizable Web application that provides you with the most complete and up-to-date DUNSRight information D&B has available, comprehensive monitoring, and portfolio analysis, all for one set price.

DNBI delivers:

- **The Power of insight**

DNBI empowers you to make more informed, efficient, and insightful credit decisions by providing online access to the **most complete and up-to-date information we have available on the more than 100 million companies in the D&B global database**. This information is presented in an easy-to-navigate, customizable Web-based format that makes your work life easier.

- **The Freedom of one set price**

View all the business information you need- **when you want and how you want**- for one set price.

- **The Confidence of DUNSRight-driven results**

Have the confidence that all the insight you gain and every decision you make using DNBI is backed by **D&B's DUNSRight Quality Process**. With D&B, you know you are using the most accurate, timely, and Complete information available.

2. Administer Users

2.1 Overview

The Administer Users link allows you to add new users, edit the user profile and set credit approval authorities.

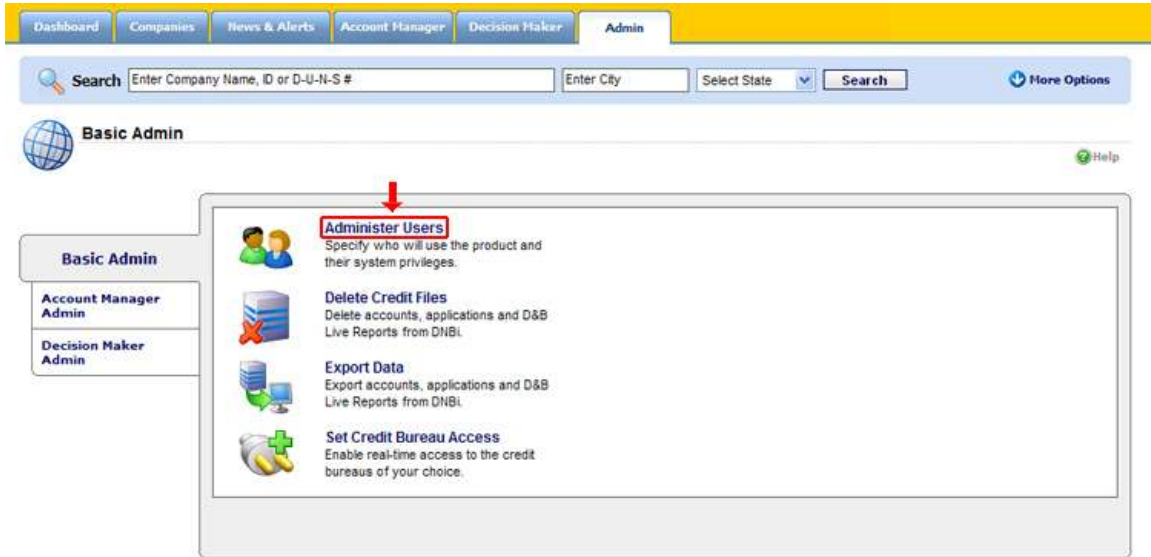


Figure 1

2.2 User List

The user list screen displays a list of all user names in the DNBI workspace, their login names, Subscriber account number, the date their user account was last modified, their status, and visibility option for Live Reports.

You can view filtered lists of users by Role.

The screenshot shows the 'Administer Users' page in the D&B Risk Management Solutions Admin interface. The page has a navigation bar with 'Admin' selected. Below the navigation bar is a search bar with the text 'Enter Company Name, ID or D-U-I-N-S #' and a 'Search' button. Below the search bar is a breadcrumb trail: 'You are in: Admin > Administer Users'. The main heading is 'Administer Users'. Below the heading are several buttons: 'Add New User', 'Configure IP Security', 'Set Role Permissions', 'Manage Workspace Territories', and 'Add Groups'. A red arrow points down from the 'Manage Workspace Territories' button to a table. The table has two tabs: 'Full List' (selected) and 'Roles'. The table has the following columns: 'User Name', 'Login Name', 'Subscriber Number', 'Status', 'Live Report Visibility', and 'Date Modified'. The table contains 8 rows of user data.

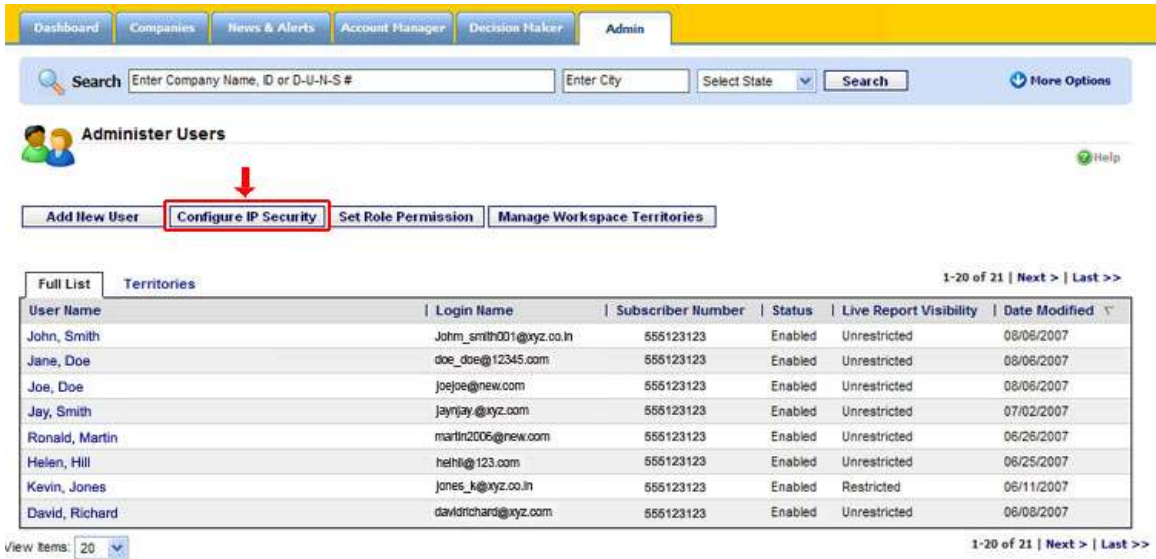
User Name	Login Name	Subscriber Number	Status	Live Report Visibility	Date Modified
John, Smith	John_smith001@xyz.co.in	555123123	Enabled	Unrestricted	08/06/2007
Jane, Doe	doe_doe@12345.com	555123123	Enabled	Unrestricted	08/06/2007
Joe, Doe	joedoe@new.com	555123123	Enabled	Unrestricted	08/06/2007
Jay, Smith	jayjay@xyz.com	555123123	Enabled	Unrestricted	07/02/2007
Ronald, Martin	martin2006@new.com	555123123	Enabled	Unrestricted	06/26/2007
Helen, Hill	helhi@123.com	555123123	Enabled	Unrestricted	06/25/2007
Kevin, Jones	jones_k@xyz.co.in	555123123	Enabled	Restricted	06/11/2007
David, Richard	davidrichard@xyz.com	555123123	Enabled	Unrestricted	06/08/2007

Figure 2

2.3 Configure IP

Admin users can configure a list of permissible locations to access DNBI by clicking on Configure IP where they can enter up to 6 network IP addresses. Once enabled, users will not be able to login from IP addresses outside those network locations.

Goto manage workspace section



The screenshot shows the 'Admin' section of the Core Admin interface. The 'Administer Users' section is active, and the 'Configure IP Security' button is highlighted with a red box and a red arrow pointing to it. Below this, there is a table of users with columns for User Name, Login Name, Subscriber Number, Status, Live Report Visibility, and Date Modified. The table contains 8 rows of user data.

User Name	Login Name	Subscriber Number	Status	Live Report Visibility	Date Modified
John, Smith	John_smith001@xyz.co.in	555123123	Enabled	Unrestricted	08/08/2007
Jane, Doe	doe_doe@12345.com	555123123	Enabled	Unrestricted	08/08/2007
Joe, Doe	joedoe@new.com	555123123	Enabled	Unrestricted	08/08/2007
Jay, Smith	jayjay@xyz.com	555123123	Enabled	Unrestricted	07/02/2007
Ronald, Martin	martin2006@new.com	555123123	Enabled	Unrestricted	06/28/2007
Helen, Hill	hethl@123.com	555123123	Enabled	Unrestricted	06/25/2007
Kevin, Jones	jones_k@xyz.co.in	555123123	Enabled	Restricted	06/11/2007
David, Richard	davidrichard@xyz.com	555123123	Enabled	Unrestricted	06/08/2007

Figure 3

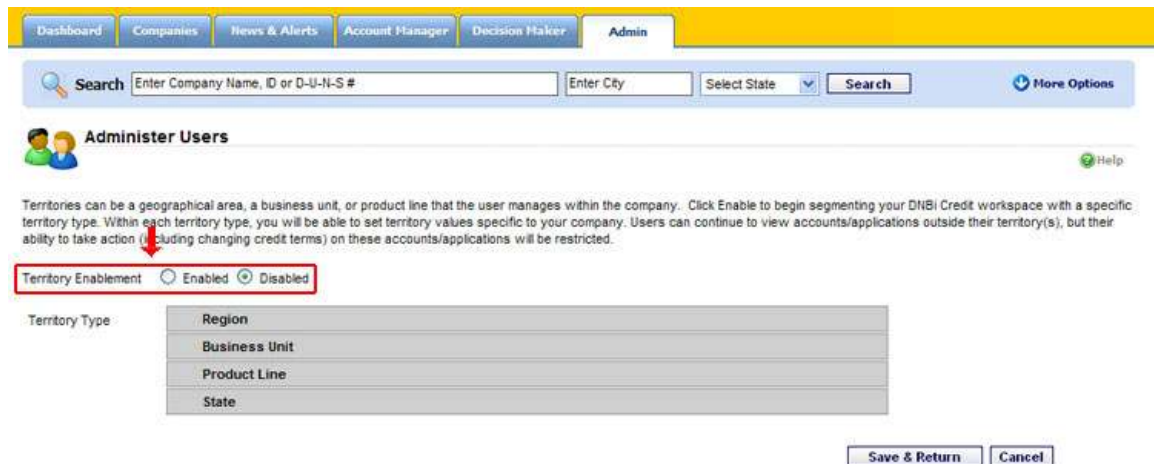
2.4 Manage Workspace Territories

Admin users can Manage Workspace Territories from this page.

Territories can be a geographical area, a business unit, or product line that the user manages within the company. In order to begin segmenting your DNBI workspace with territories, your DNBI administrator will need to go into DNBI admin and enable territories.

Territories functionality allows users to focus on managing accounts and applications within their territory(s). Users can continue to view accounts/applications outside their territory(s), but their ability to take action (including changing credit terms) on these accounts/applications will be restricted.

(Available with Account manager and Decision Maker Modules only).



The screenshot shows the DNBI Admin interface. At the top, there is a navigation bar with tabs for Dashboard, Companies, News & Alerts, Account Manager, Decision Maker, and Admin. Below the navigation bar is a search bar with fields for 'Enter Company Name, ID or D-U-N-S #', 'Enter City', and 'Select State', along with a 'Search' button and a 'More Options' link. The main content area is titled 'Administer Users' and includes a 'Help' icon. A red arrow points to the 'Territory Enablement' section, which has radio buttons for 'Enabled' and 'Disabled', with 'Disabled' selected. Below this is a 'Territory Type' section with a table listing 'Region', 'Business Unit', 'Product Line', and 'State'. At the bottom right, there are 'Save & Return' and 'Cancel' buttons.

Territory Type	Region
	Business Unit
	Product Line
	State

Figure 4

2.5 Assign Users to Territories

Assign Territories to users by selecting users and then choosing from the Territories you previously created. and then assigning these to the users. (Available with Account manager and Decision Maker Modules only)

The screenshot shows the 'Administer Users' section of the application. At the top, there are navigation tabs: Dashboard, Companies, News & Alerts, Account Manager, Decision Maker, and Admin. Below these is a search bar with fields for 'Enter Company Name, ID or D-U-N-S #', 'Enter City', and 'Select State', along with a 'Search' button and a 'More Options' link. The main heading is 'Administer Users' with a 'Help' icon. Below the heading are four buttons: 'Add New User', 'Configure IP Security', 'Set Role Permission', and 'Manage Workspace Territories'. A red arrow points from the 'Manage Workspace Territories' button to a table below. The table has tabs for 'Full List' and 'Territories', and a '1-5 of 5' indicator. The table is titled 'View by Territory Value | View by User' and has columns: Territory Value, User Name, Login Name, Subscriber Number, Status, and Live Report Visibility. The table content includes:

- ▶ All (11)
- ▶ Business Unit 1 (4)
- ▶ Business Unit 2 (2)
- ▶ Business Unit 3 (6)
- ▶ Business Unit 4 (1)

 At the bottom of the table is a button 'Assign Territory Value(s) ▶'. Below the table, there is a 'View Items: 20' dropdown and a '1-5 of 5' indicator.

Figure 5

2.6 Set Role Permissions

Admin users can customize Role Permissions to extend or disable access to features for all users assigned to a role. Modifying the permissions for a role will change access permissions for every user assigned to that role.

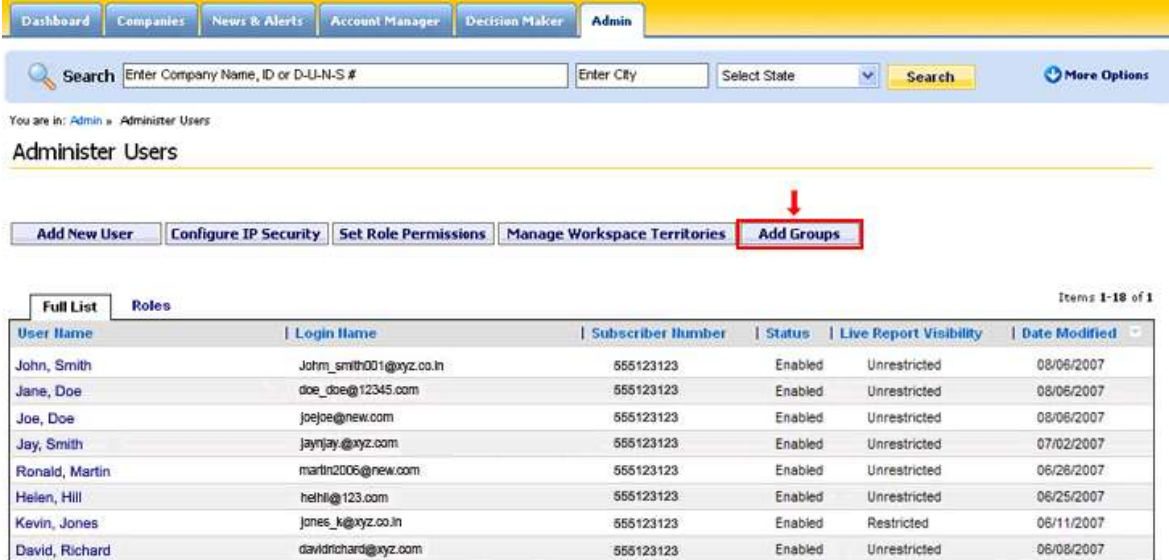
The screenshot shows the 'Admin' tab selected in the top navigation bar. Below it is a search bar with fields for 'Enter Company Name, ID or D-U-N-S #', 'Enter City', and 'Select State', along with a 'Search' button and a 'More Options' link. The main section is titled 'Administer Users' and contains four sub-sections: 'Add New User', 'Configure IP Security', 'Set Role Permission' (highlighted with a red box and a red arrow pointing to it), and 'Manage Workspace Territories'. Below these sub-sections is a table with columns for 'User Name', 'Login Name', 'Subscriber Number', 'Status', 'Live Report Visibility', and 'Date Modified'. The table lists eight users. At the bottom left, there is a 'View Items' dropdown set to '20'. At the bottom right, there is a pagination control showing '1-20 of 21 | Next > | Last >>'.

User Name	Login Name	Subscriber Number	Status	Live Report Visibility	Date Modified
John, Smith	John_smith001@xyz.co.in	555123123	Enabled	Unrestricted	08/08/2007
Jane, Doe	doe_doe@12345.com	555123123	Enabled	Unrestricted	08/06/2007
Joe, Doe	joedoe@new.com	555123123	Enabled	Unrestricted	08/06/2007
Jay, Smith	jayjay@xyz.com	555123123	Enabled	Unrestricted	07/02/2007
Ronald, Martin	martin2006@new.com	555123123	Enabled	Unrestricted	06/26/2007
Helen, Hill	helli@123.com	555123123	Enabled	Unrestricted	06/25/2007
Kevin, Jones	jones_k@xyz.co.in	555123123	Enabled	Restricted	06/11/2007
David, Richard	davidrichard@xyz.com	555123123	Enabled	Unrestricted	06/08/2007

Figure 6

2.7 Add New Group

You can create groups which will have additional permission restrictions so you can place users with different roles within a group to limit their access to a few features.



Dashboard Companies News & Alerts Account Manager Decision Maker Admin

Search Enter Company Name, ID or D-U-N-S # Enter City Select State Search More Options

You are in: Admin » Administer Users

Administer Users

Add New User Configure IP Security Set Role Permissions Manage Workspace Territories **Add Groups**

Full List Roles Items 1-18 of 1

User Name	Login Name	Subscriber Number	Status	Live Report Visibility	Date Modified
John, Smith	John_smith001@xyz.co.in	555123123	Enabled	Unrestricted	08/06/2007
Jane, Doe	doe_doe@12345.com	555123123	Enabled	Unrestricted	08/06/2007
Joe, Doe	joedoe@new.com	555123123	Enabled	Unrestricted	08/06/2007
Jay, Smith	jayjay@xyz.com	555123123	Enabled	Unrestricted	07/02/2007
Ronald, Martin	martin2006@new.com	555123123	Enabled	Unrestricted	06/26/2007
Helen, Hill	helhi@123.com	555123123	Enabled	Unrestricted	08/25/2007
Kevin, Jones	Jones_k@xyz.co.in	555123123	Enabled	Restricted	06/11/2007
David, Richard	davidrichard@xyz.com	555123123	Enabled	Unrestricted	06/08/2007

Figure 7

2.8 Add New User

In the Add User screen, enter the required information fields, as indicated with a red asterisk

In the User Roles field, select the role(s) the user will perform in DNBI. A user can be assigned multiple roles depending on the job function. The role(s) assigned determines the actions the user can perform and view in DNBI. Hold down CTRL button to select multiple roles

If there are multiple subscriber accounts within your company's D&B contract, users can be set up with permissions under either the main Organization sub or point sub number.

You may set a user to have a Restricted view of only his/her reports in their 'My Companies' folder and their alerts and Dashboard views would reflect only companies they inquired on. Unrestricted users will have access to live reports ordered by anyone within the shared workspace in the 'All companies' folder and their Alerts and Dashboard views would be driven by all companies in the shared workspace. The default will be a restricted view for users being added as of July 2007.

For User Status box, select enable to allow the user to access DNBi. Selecting Disabled leaves the user's information in the system, but does not allow the user to log into DNBi until the status is enabled

Dashboard Companies News & Alerts Account Manager Decision Maker Admin

Search Enter Company Name, ID or D-U-N-S # Enter City Select State Search More Options

You are in: Admin » Administer Users

Administer Users

↓

Add New User Configure IP Security Set Role Permissions Manage Workspace Territories Add Groups

Full List Roles Items 1-18 of 1

User Name	Login Name	Subscriber Number	Status	Live Report Visibility	Date Modified
John, Smith	John_smith001@xyz.co.in	555123123	Enabled	Unrestricted	08/06/2007
Jane, Doe	doe_doe@12345.com	555123123	Enabled	Unrestricted	08/06/2007
Joe, Doe	joedoe@new.com	555123123	Enabled	Unrestricted	08/06/2007
Jay, Smith	jayjay@xyz.com	555123123	Enabled	Unrestricted	07/02/2007
Ronald, Martin	martin2006@new.com	555123123	Enabled	Unrestricted	06/26/2007
Helen, Hill	helhi@123.com	555123123	Enabled	Unrestricted	06/25/2007
Kevin, Jones	Jones_k@xyz.co.in	555123123	Enabled	Restricted	06/11/2007
David, Richard	davidrichard@xyz.com	555123123	Enabled	Unrestricted	06/08/2007

Figure 8

2.9 Edit User Profile

To edit a user's profile information, click on the user name in the list.

The currently saved user details information will be displayed. Click on the edit button to make changes to the user profile.

The edit profile screen will allow you to make any changes to name, address, role, and user status. However, you will not be able to change the email address.

The screenshot shows the 'Administer Users' interface. At the top, there are navigation tabs: Dashboard, Companies, News & Alerts, Account Manager, Decision Maker, and Admin. Below these is a search bar with fields for 'Enter Company Name, ID or D-U-N-S #', 'Enter City', and 'Select State', along with a 'Search' button and a 'More Options' link. The main heading is 'Administer Users' with a 'Help' icon. Below the heading are four buttons: 'Add New User', 'Configure IP Security', 'Set Role Permission', and 'Manage Workspace Territories'. A table titled 'Full List' shows a list of users. The first row, 'John, Smith', is highlighted with a red box. The table has columns for 'User Name', 'Login Name', 'Subscriber Number', 'Status', 'Live Report Visibility', and 'Date Modified'. Below the table, there is a 'View Items' dropdown set to '20' and pagination links '1-20 of 21 | Next > | Last >>'.

User Name	Login Name	Subscriber Number	Status	Live Report Visibility	Date Modified
John, Smith	John_smith001@xyz.co.in	555123123	Enabled	Unrestricted	08/08/2007
Jane, Doe	doe_doe@12345.com	555123123	Enabled	Unrestricted	08/08/2007
Joe, Doe	joedoe@new.com	555123123	Enabled	Unrestricted	08/08/2007
Jay, Smith	jayjay@xyz.com	555123123	Enabled	Unrestricted	07/02/2007
Ronald, Martin	martin2006@new.com	555123123	Enabled	Unrestricted	06/28/2007
Helen, Hill	hethl@123.com	555123123	Enabled	Unrestricted	06/25/2007
Kevin, Jones	jones_k@xyz.co.in	555123123	Enabled	Restricted	06/11/2007
David, Richard	davidrichard@xyz.com	555123123	Enabled	Unrestricted	06/08/2007

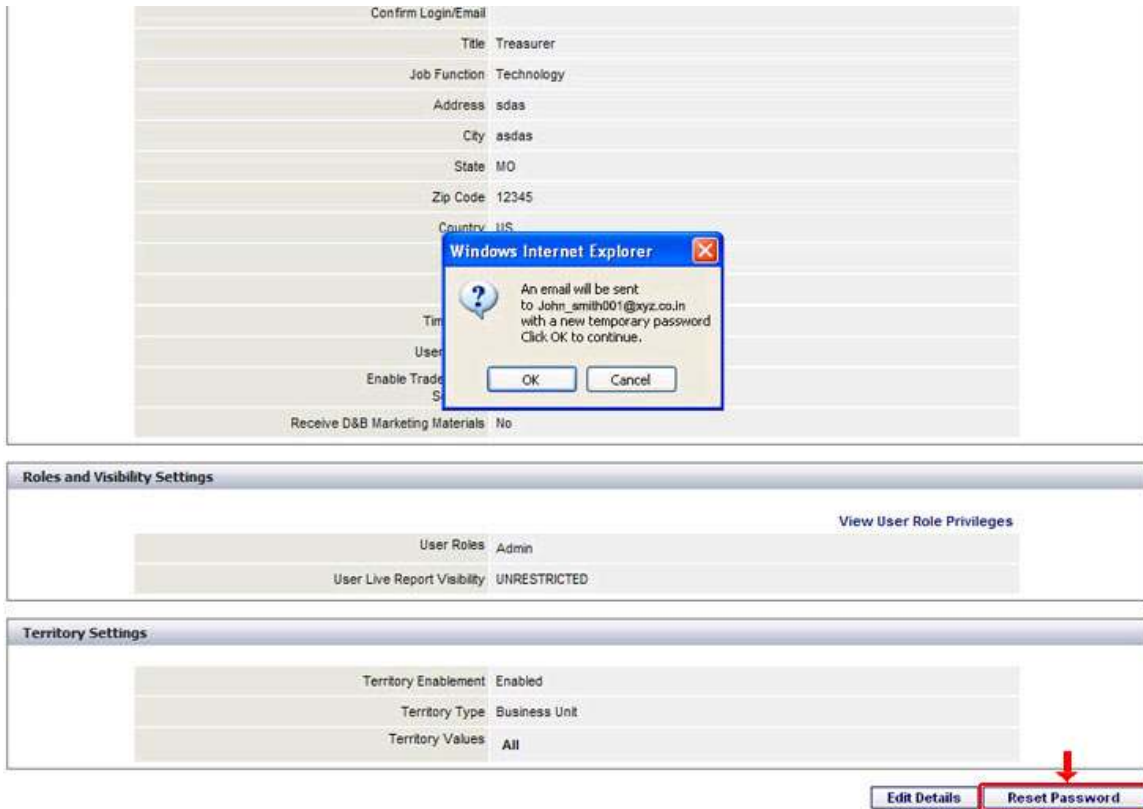
Figure 9

2.10 Reset Password

To reset a user's password, click on the user name on the list

The currently saved user details information will be displayed, click on the Reset Password button. A separate window will be displayed confirming the request.

To proceed with the change, click OK. The user will receive an email with a temporary password. Otherwise, click Cancel to exit the window.



The screenshot displays a user profile page with a confirmation dialog box overlaid. The dialog box, titled "Windows Internet Explorer", contains the following text: "An email will be sent to John_smith001@xyz.co.in with a new temporary password. Click OK to continue." Below the text are "OK" and "Cancel" buttons. The background page shows user details, roles, and territory settings.

Confirm Login/Email	
Title	Treasurer
Job Function	Technology
Address	sdas
City	asdas
State	MO
Zip Code	12345
Country	US
Time Zone	
User Name	
Enable Trade Shows	
Receive D&B Marketing Materials	No

Roles and Visibility Settings	
User Roles	Admin
User Live Report Visibility	UNRESTRICTED

Territory Settings	
Territory Enablement	Enabled
Territory Type	Business Unit
Territory Values	All

Buttons:

Figure 10

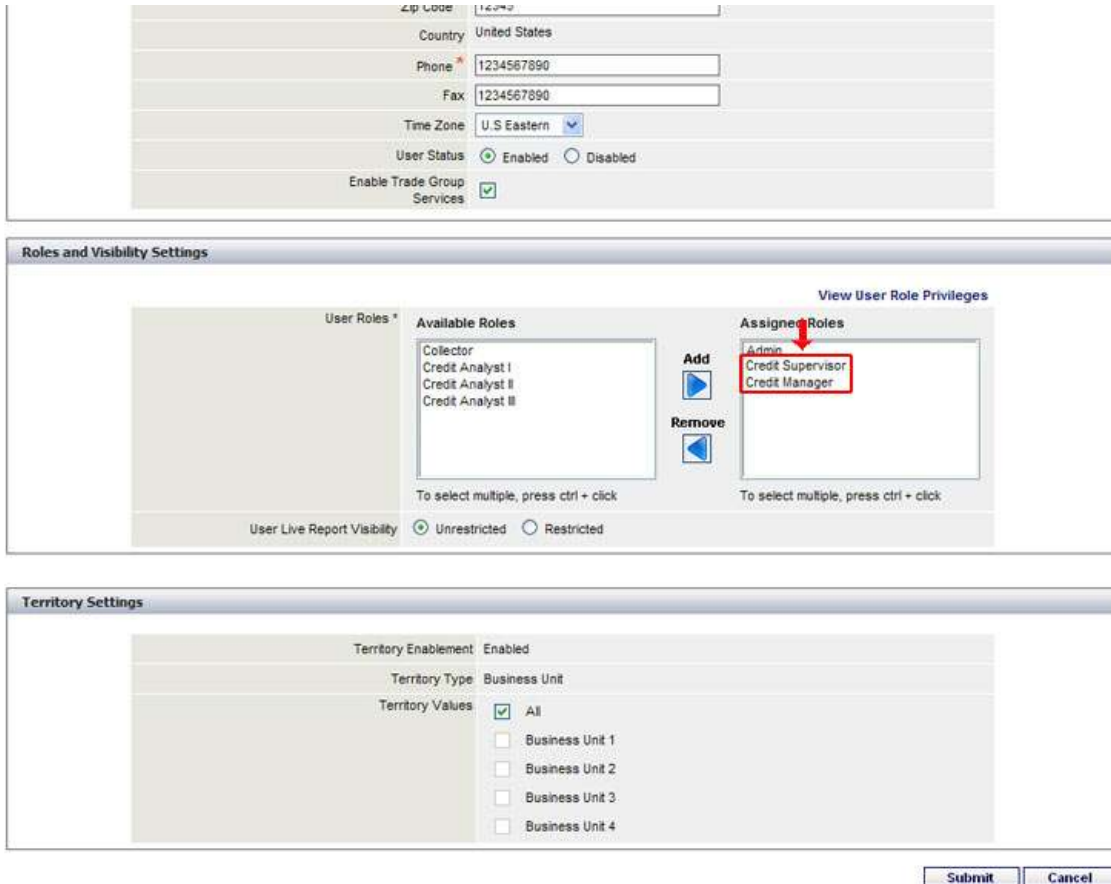
2.11 Reassign Roles

To assign additional roles to an user, click on the user name on the list

The currently saved user detail information will be displayed. Click on the Assign Roles button.

The role(s) currently assigned will be displayed in the box on the right. To add or delete roles, just highlight the role and click on the appropriate button.

Once complete, click the Update button. Otherwise, click the Cancel button to return to the user details screen



The screenshot displays a user management interface with three main sections:

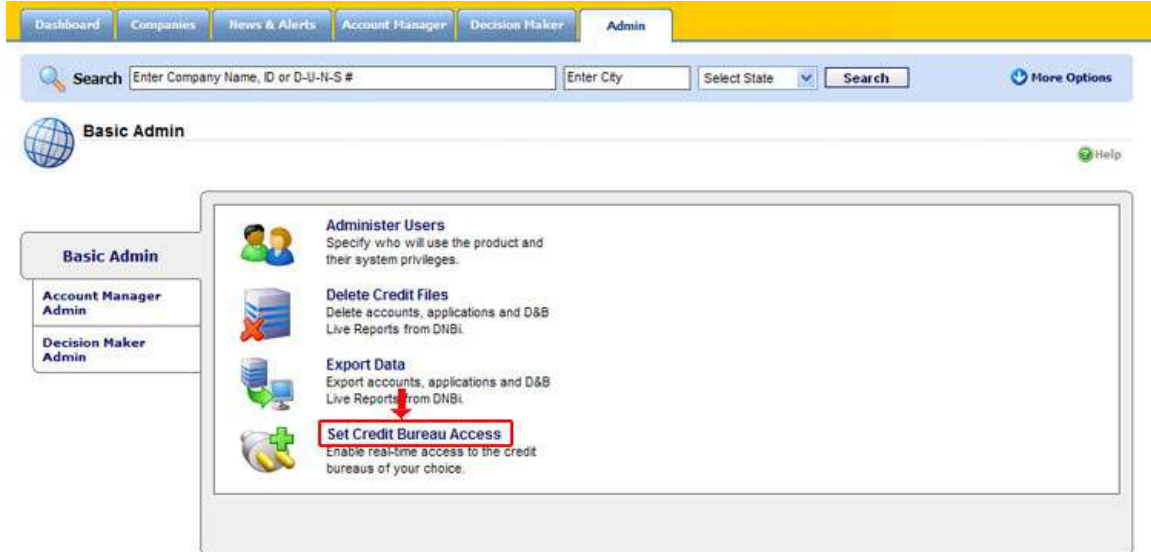
- User Details:** Fields for Zip Code, Country (United States), Phone (1234567890), Fax (1234567890), Time Zone (U.S. Eastern), User Status (Enabled), and Enable Trade Group Services (checked).
- Roles and Visibility Settings:**
 - User Roles:** A list of roles including Collector, Credit Analyst I, Credit Analyst II, and Credit Analyst III.
 - Available Roles:** A list of roles including Collector, Credit Analyst I, Credit Analyst II, and Credit Analyst III.
 - Assigned Roles:** A list of roles including Admin, Credit Supervisor, and Credit Manager. A red box highlights the Admin, Credit Supervisor, and Credit Manager roles, with a red arrow pointing to the Admin role.
 - Buttons:** Add and Remove buttons are located between the Available Roles and Assigned Roles lists.
 - Instructions:** "To select multiple, press ctrl + click" is shown below both the Available Roles and Assigned Roles lists.
 - User Live Report Visibility:** Radio buttons for Unrestricted and Restricted.
- Territory Settings:**
 - Territory Enablement:** Enabled
 - Territory Type:** Business Unit
 - Territory Values:** All (checked), Business Unit 1, Business Unit 2, Business Unit 3, and Business Unit 4.

At the bottom right, there are **Submit** and **Cancel** buttons.

Figure 11

3. Set Credit Bureau Access

The Set Credit Bureau Access link allows you to set up real time access to credit bureaus other than D&B (Note: This functionality is only available to subscribers of Account Manager and/or Decision Maker who have an established account with supported third party bureaus.)



The screenshot displays the D&B Core Admin interface. At the top, there is a navigation bar with tabs for Dashboard, Companies, News & Alerts, Account Manager, Decision Maker, and Admin. Below this is a search bar with fields for 'Enter Company Name, ID or D-U-N-S #', 'Enter City', and 'Select State', along with a 'Search' button and a 'More Options' link. The main content area is titled 'Basic Admin' and features a sidebar with links for 'Basic Admin', 'Account Manager Admin', and 'Decision Maker Admin'. The main panel lists several administrative functions: 'Administer Users' (Specify who will use the product and their system privileges), 'Delete Credit Files' (Delete accounts, applications and D&B Live Reports from DNB), 'Export Data' (Export accounts, applications and D&B Live Reports from DNB), and 'Set Credit Bureau Access' (Enable real-time access to the credit bureaus of your choice). The 'Set Credit Bureau Access' option is highlighted with a red box and a red arrow pointing to it.

Figure 12

4. Delete Credit Files

This functionality allows you to delete all records of one or more credit file types currently saved in your workspace.

You can choose the type(s) of credit files to delete. A separate window will be displayed confirming this transaction. To proceed, click OK. Otherwise, click Cancel to exit the window separate.

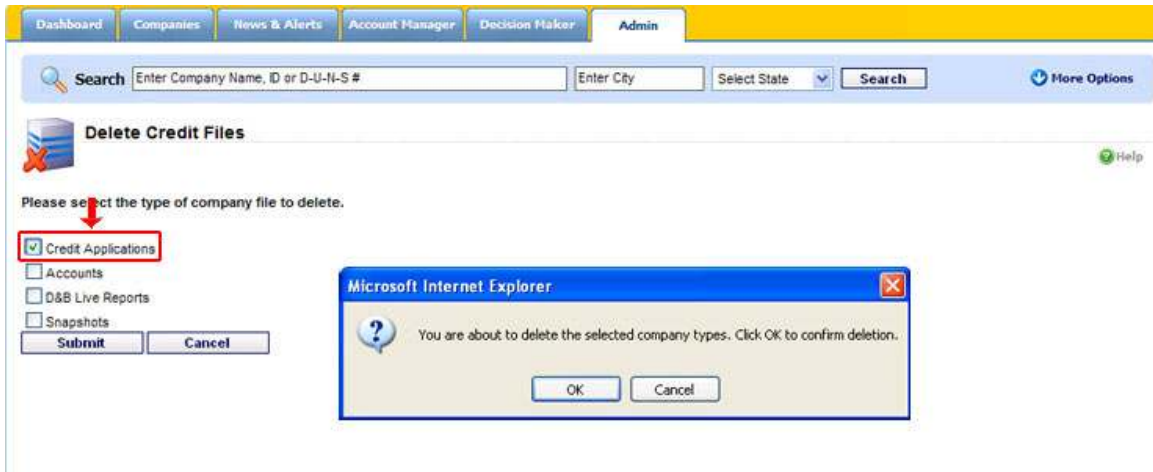


Figure 13

5. Export Data

5.1 Overview

This functionality allows you to export select records of a type of credit file based on configurable criteria.

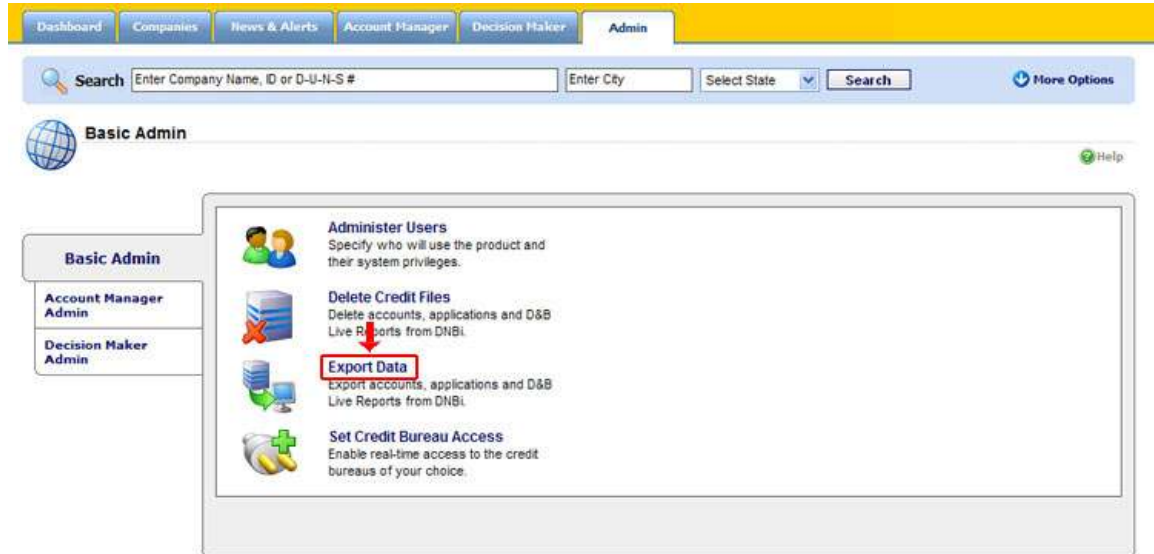


Figure 14

5.2 Set Export Criteria

This screen will show any export file jobs you have submitted and their readiness of files to download.

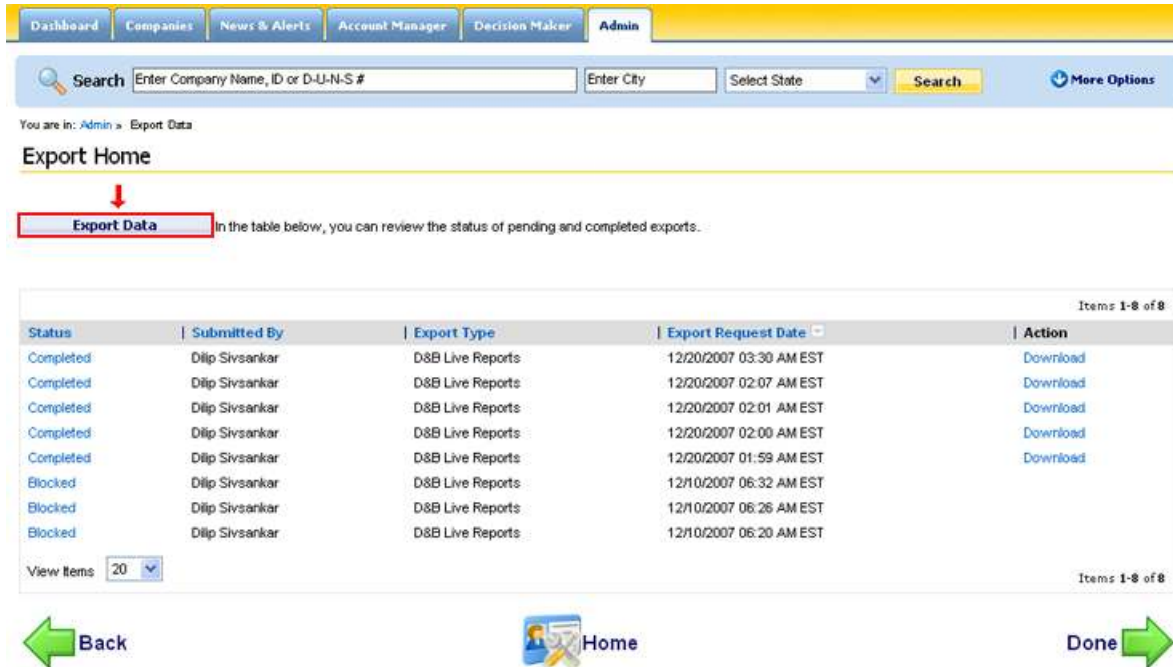
Click on Export Data button to you to select the type of credit file to export. Then, set the export criteria limiting the file records. Select the file type (Snapshot or Live Report for example), select Country and then Select search criteria fields and values. The default criteria displayed is Company Name. You may also select a country in your criteria.

You can add new fields by clicking on "Add Search Field." to further limit the file records. You can delete fields by clicking on the red X

Enter the search criteria values and click on Search. The list of credit files matching the search criteria will be displayed finally, select the data fields to be included in your export file from the list displayed by highlighting a field and clicking the Add icon.

Select a file format from either .CSV file or Microsoft Excel.

Click on the "Search" button to proceed and a list of companies will be returned.



Dashboard Companies News & Alerts Account Manager Decision Maker **Admin**

Search Enter Company Name, ID or D-U-N-S # Enter City Select State Search More Options

You are in: Admin > Export Data

Export Home

Export Data In the table below, you can review the status of pending and completed exports.

Status	Submitted By	Export Type	Export Request Date	Action
Completed	Dilip Sivsankar	D&B Live Reports	12/20/2007 03:30 AM EST	Download
Completed	Dilip Sivsankar	D&B Live Reports	12/20/2007 02:07 AM EST	Download
Completed	Dilip Sivsankar	D&B Live Reports	12/20/2007 02:01 AM EST	Download
Completed	Dilip Sivsankar	D&B Live Reports	12/20/2007 02:00 AM EST	Download
Completed	Dilip Sivsankar	D&B Live Reports	12/20/2007 01:59 AM EST	Download
Blocked	Dilip Sivsankar	D&B Live Reports	12/10/2007 06:32 AM EST	
Blocked	Dilip Sivsankar	D&B Live Reports	12/10/2007 06:26 AM EST	
Blocked	Dilip Sivsankar	D&B Live Reports	12/10/2007 06:20 AM EST	

View Items 20

Items 1-8 of 8

Back Home Done

Figure 15

5.3 Display and Export Results

The results can be filtered further using the criteria in the drop down menu

Click on the export button to create a file which can be downloaded. Creating the file may take some time depending on size.

Click Next to return to the Export Home page to view the status of the file creation.

The Export home page will inform you of the export status and when a file is ready, click on the download icon to retrieve the file.

The screenshot shows the 'Export Data' interface. At the top, there is a search bar with fields for 'Enter Company Name, ID or D-U-N-S #', 'Enter City', and 'Select State'. Below the search bar, the breadcrumb trail reads 'You are in: Admin » Export Data » Search » Search Results'. The main heading is 'Export Data'. Below this, there is a 'View:' dropdown set to 'D&B Live Reports' and a 'Show company names that' dropdown set to 'All In List'. A red box highlights the 'Show company names that' dropdown, and a red arrow points to it. To the right of the dropdowns are 'Filter' and 'Reset List' buttons. Below the dropdowns is a 'Create Export File' button. A horizontal menu shows letters 'F G H I J K L M N O P Q R S T U V W X Y Z # All'. Below this is a table with the following data:

Type	Company Name	PAYDEX®	Commercial Credit Score Percentile	Financial Stress Score Percentile	D&B Alerts
D&B Live Report D-U-N-S Number 03-673-2116	GORMAN MANUFACTURING COMPANY, LLC 1073 S BOYLE AVE LOS ANGELES, CA 900231246		4	4	
D&B Live Report D-U-N-S Number 80-473-5132	GORMAN MANUFACTURING COMPANY, LLC 492 KOLLER STREET SAN FRANCISCO, CA 94110	▲ 41	▲ 20	▲ 10	

At the bottom left, there is a 'View Items' dropdown set to '10'. At the bottom right, it says 'Items 1-2 of 2'.

Figure 16

6. Summary

DNBi Basic Admin Tutorial Review:

- **Administer Users: Allows you to add new users, edit user profile and set credit approval authorities and set up access to credit bureaus:**
 - Assign one or more roles depending on the job function.
 - Create and Assign users to Groups for more control over permissions
 - Quickly reset a password or disable user access.
 - Easily set and change credit limit approval authorities depending on company policy.
 - Set up real time access to credit bureaus other than D&B.
- **Delete Credit Files:** Allows you to delete all records of one or more credit file types currently saved in your workspace.
- **Export Data:** Allows you to export select records of a type of credit file based on configurable criteria.

D&B Risk Management Solutions
For more information about DNBi, please contact D&B at 800.234.3867
www.DNB.com