Risk Management Solutions

DNBi Product Tours

Core Admin - Tour

Table of Contents

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.

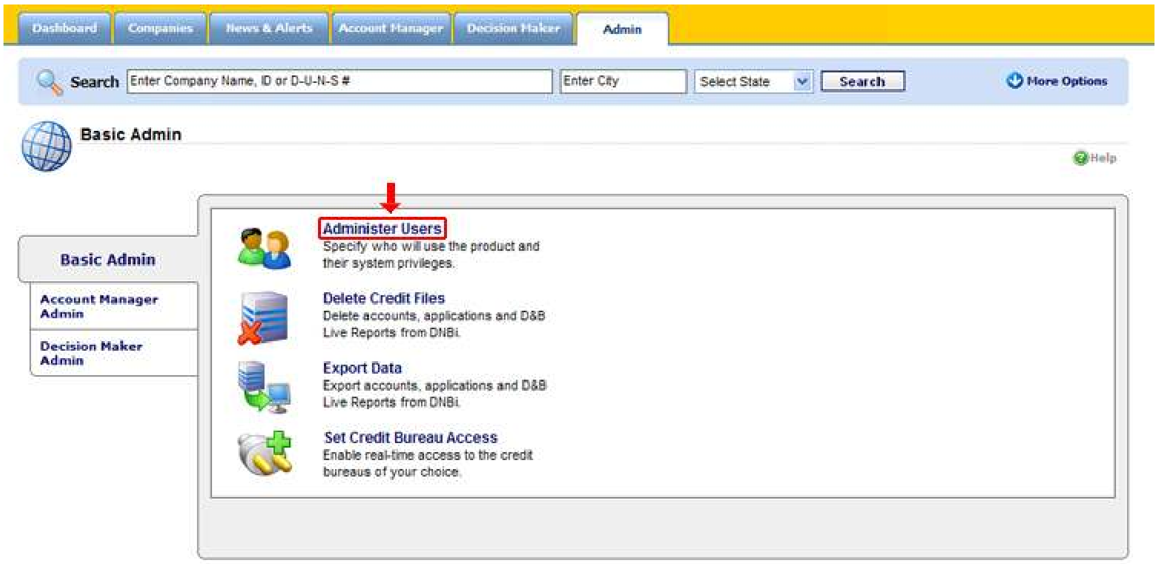

Figure 1

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.

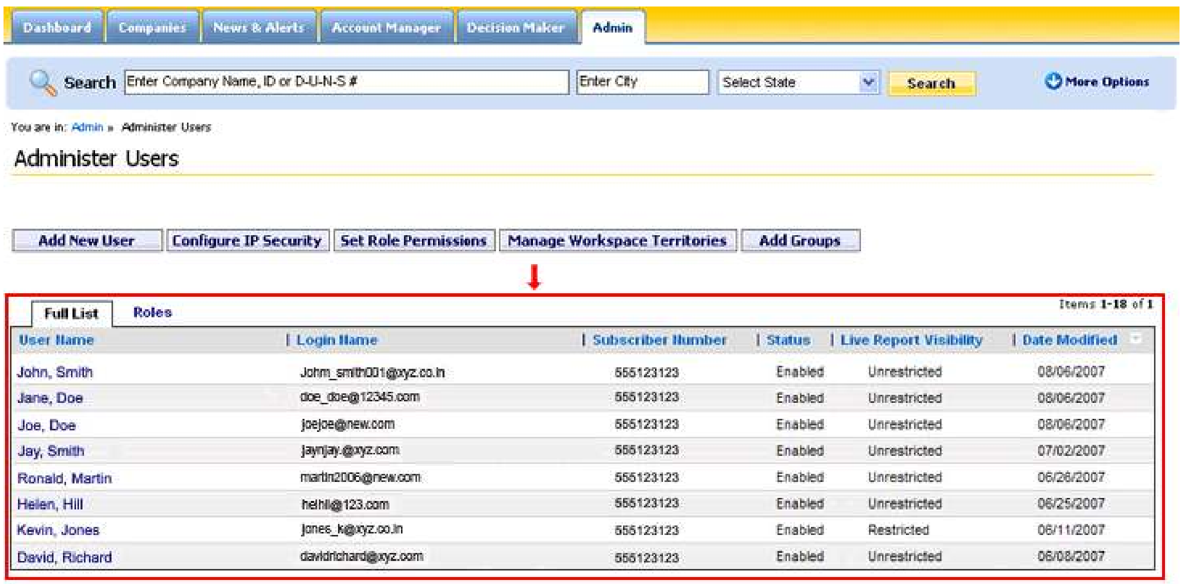

Figure 2

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

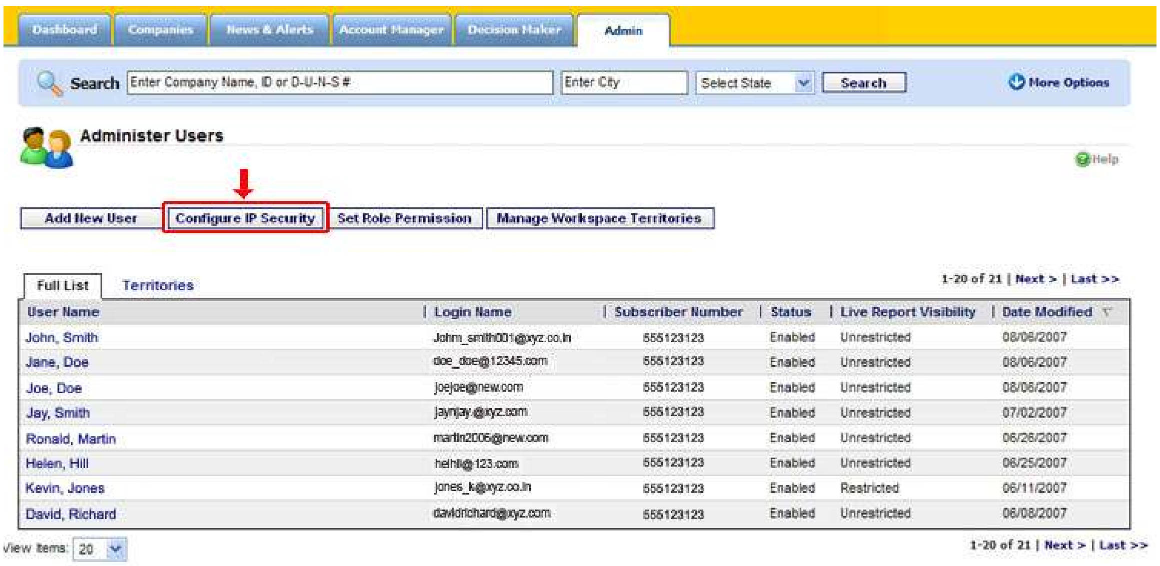

Figure 3

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).

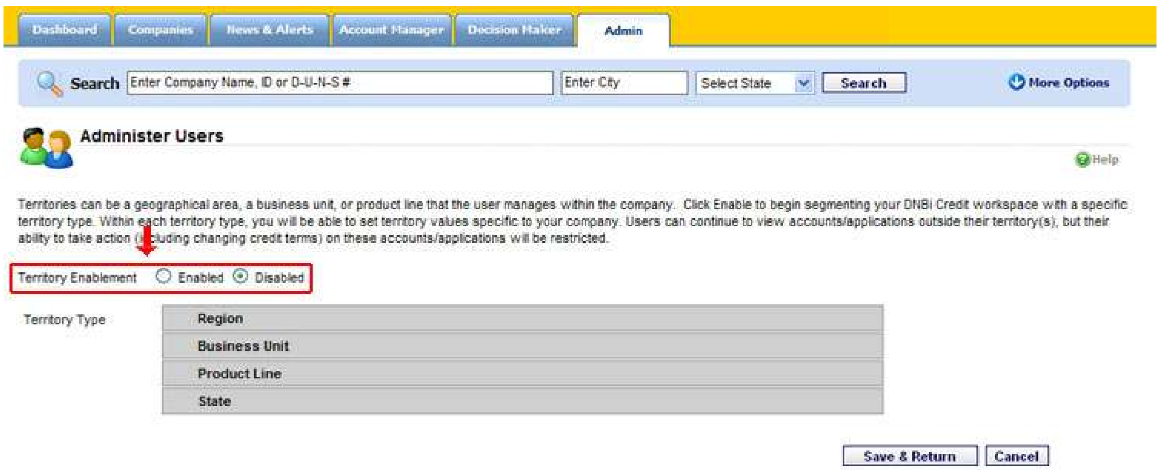

Figure 4

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)

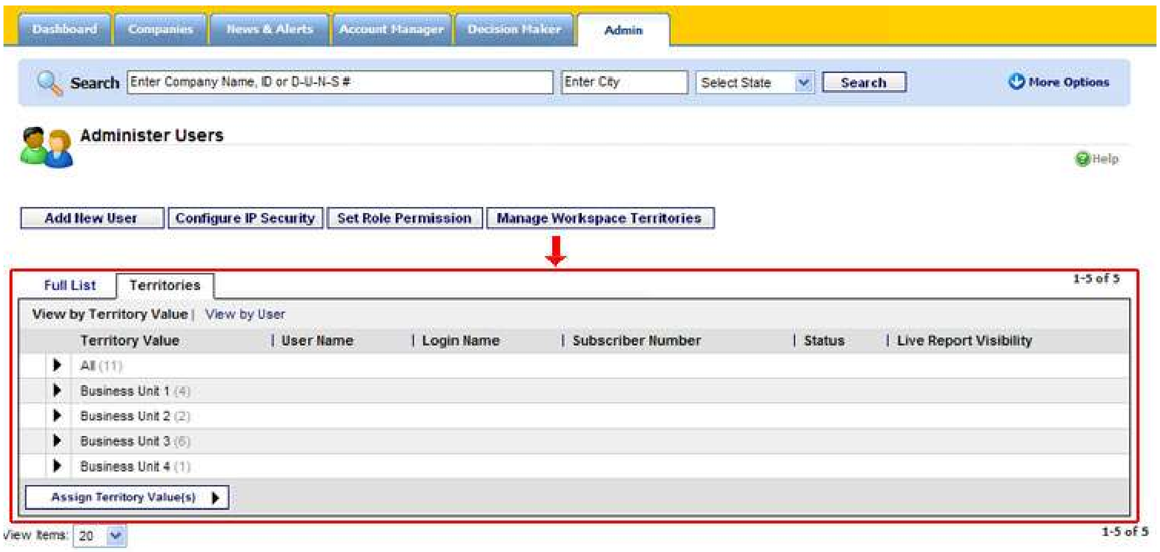

Figure 5

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.

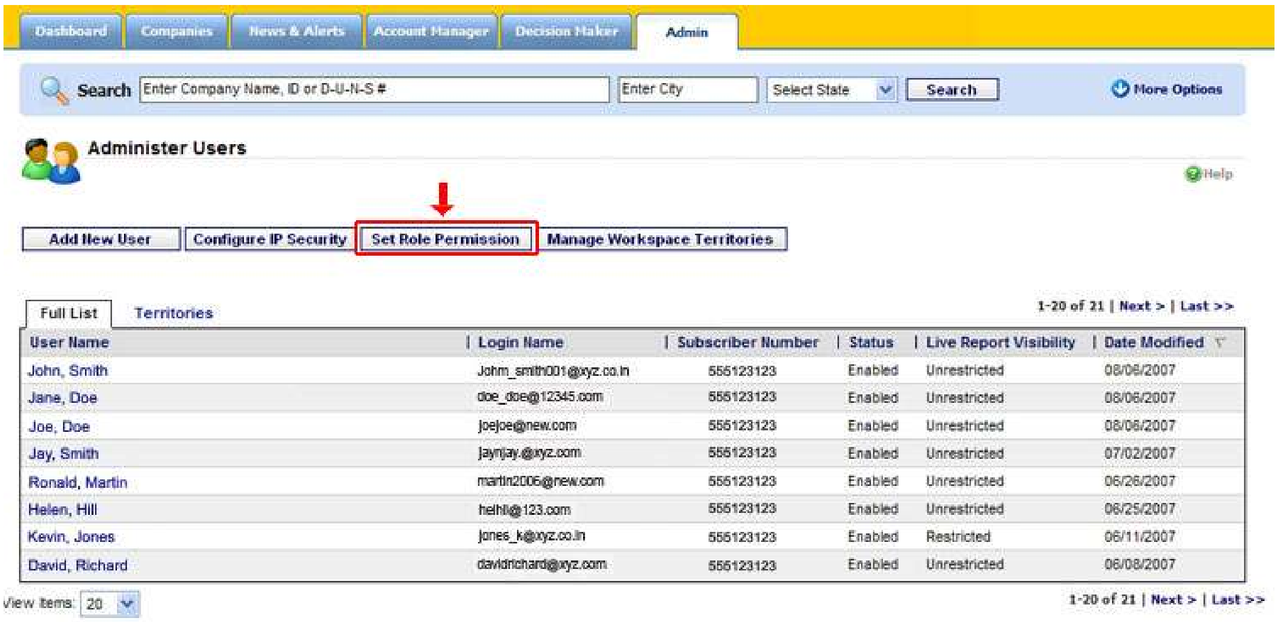

Figure 6

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.

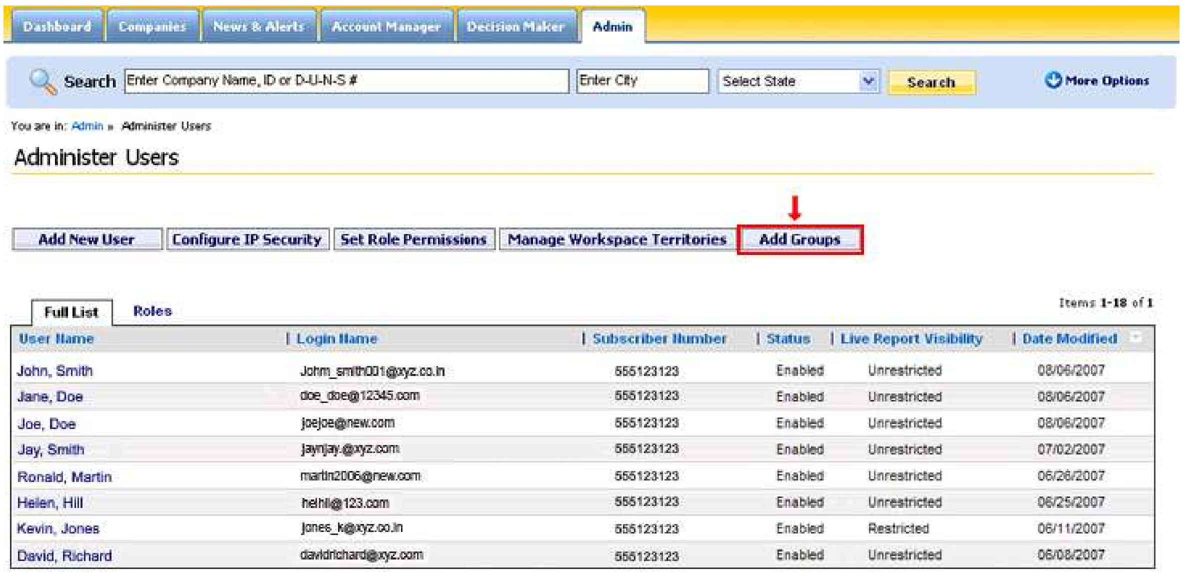

Figure 7

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 subriber 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

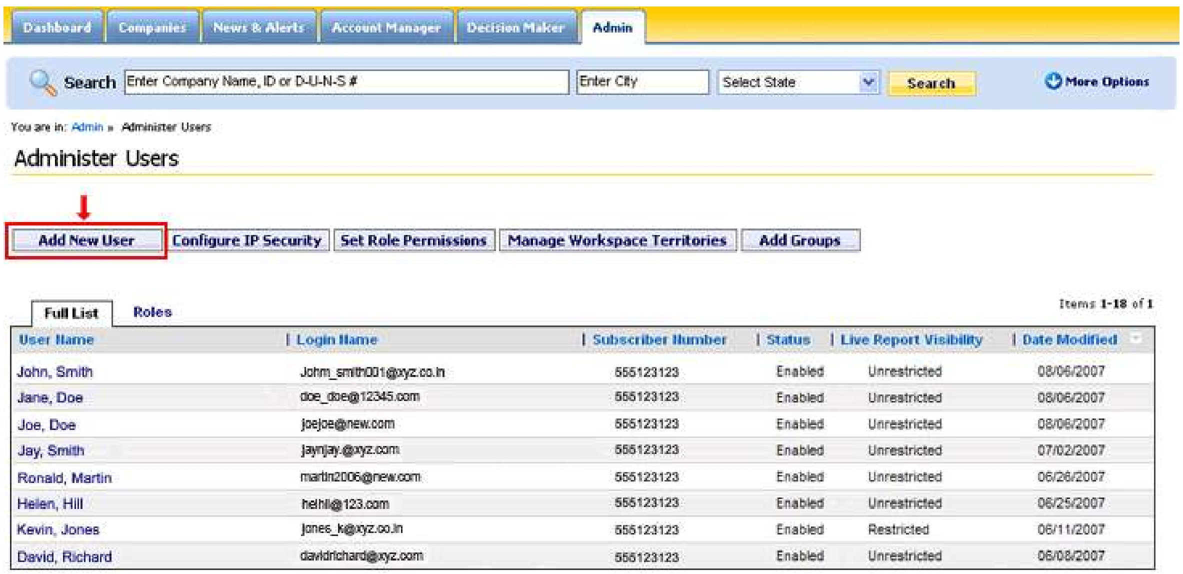

Figure 8

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.

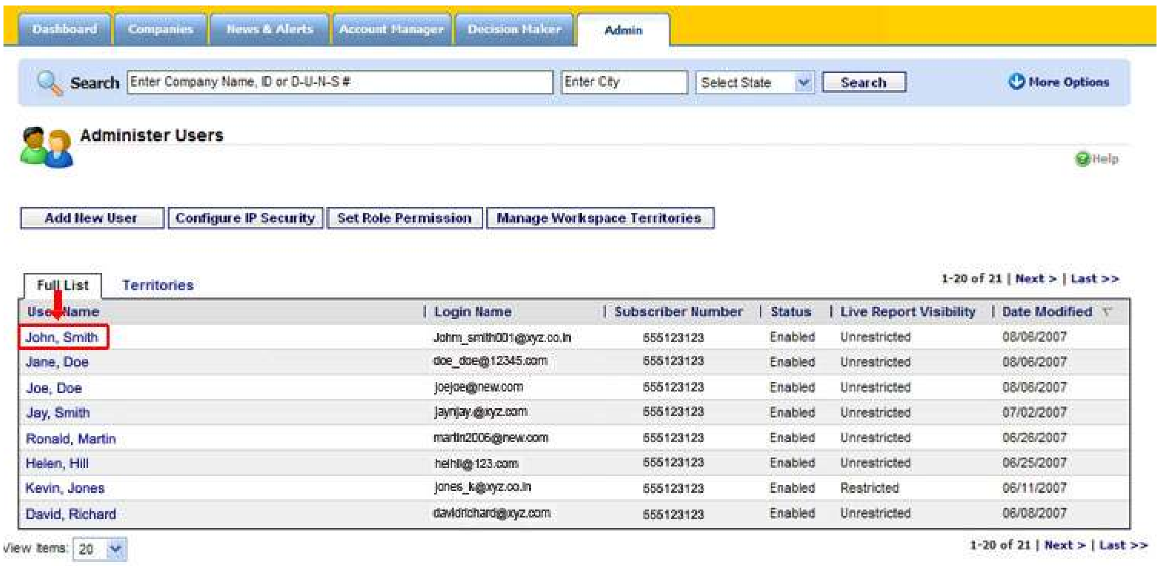

Figure 9

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.

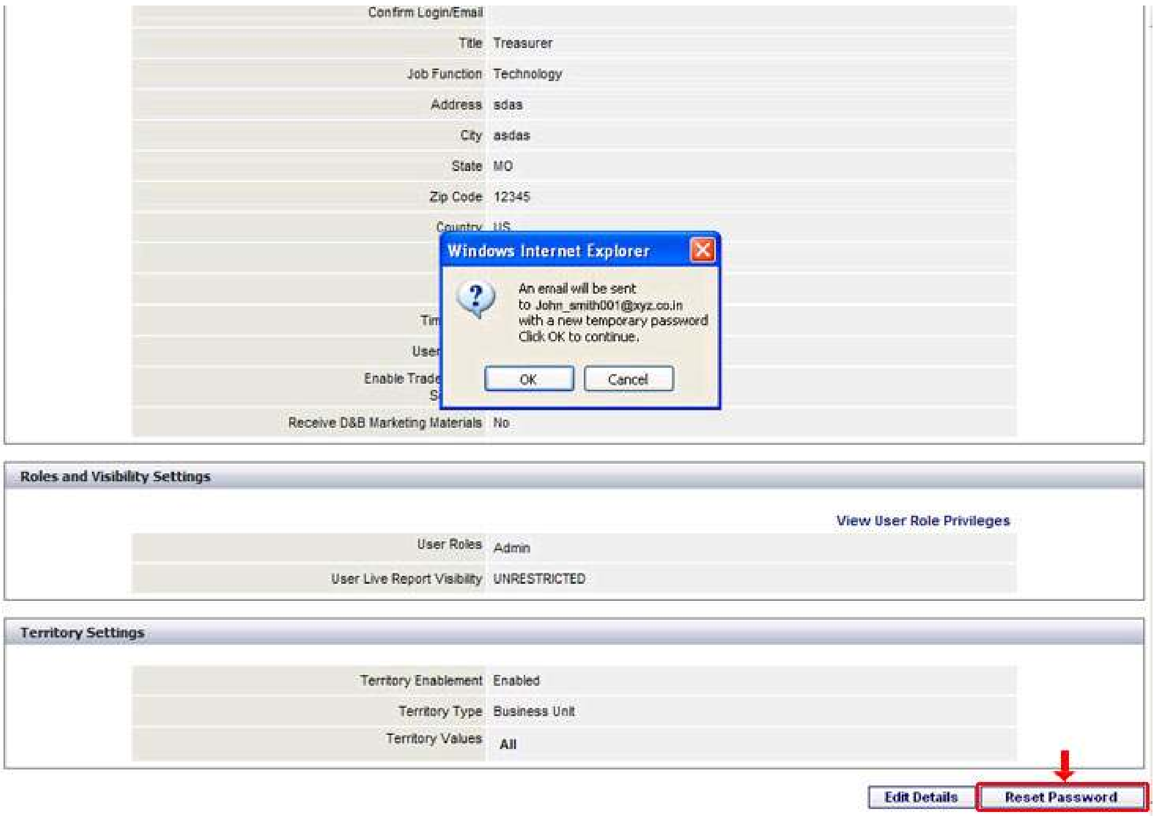

Figure 10

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

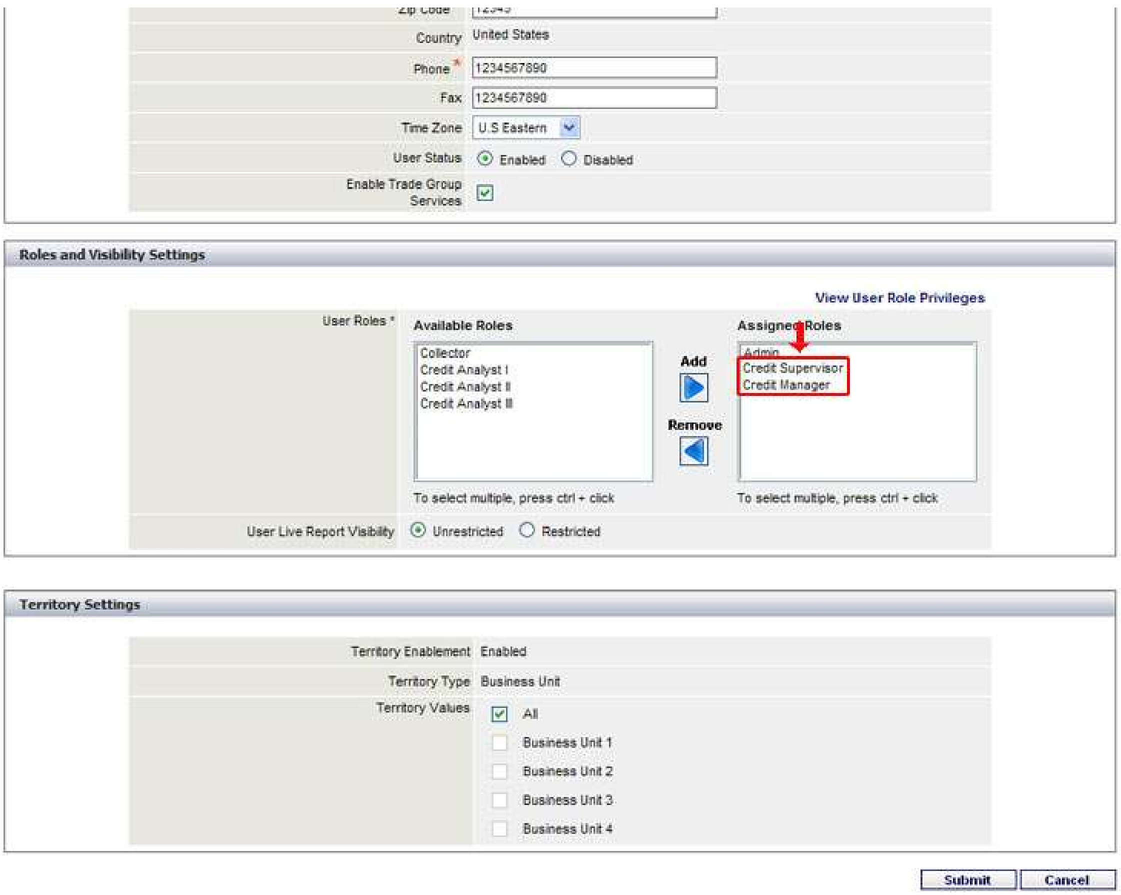

Figure 11

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.)

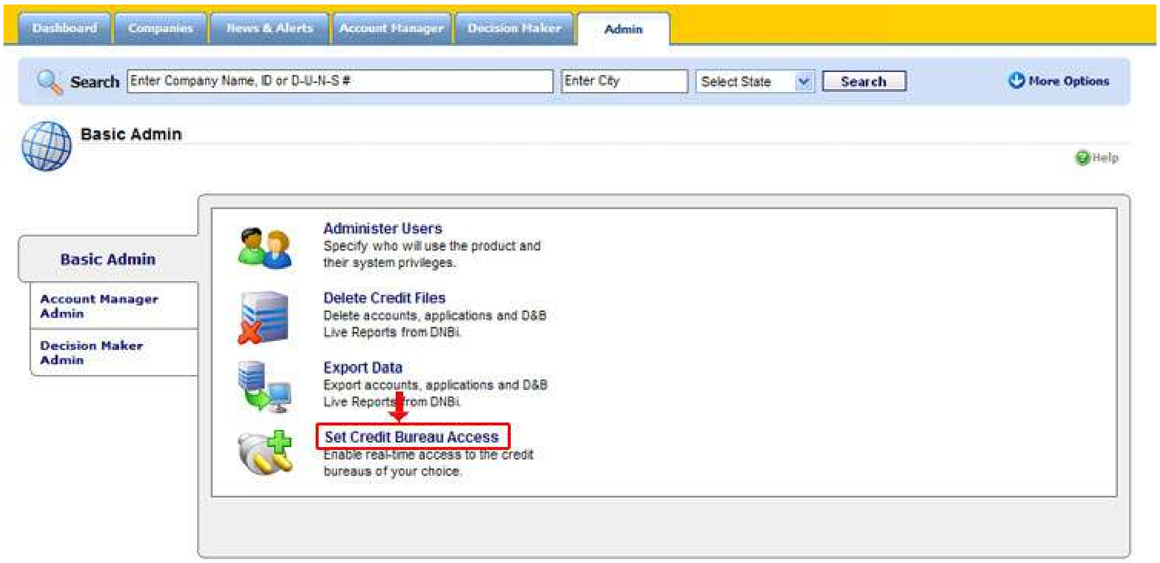

Figure 12

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.

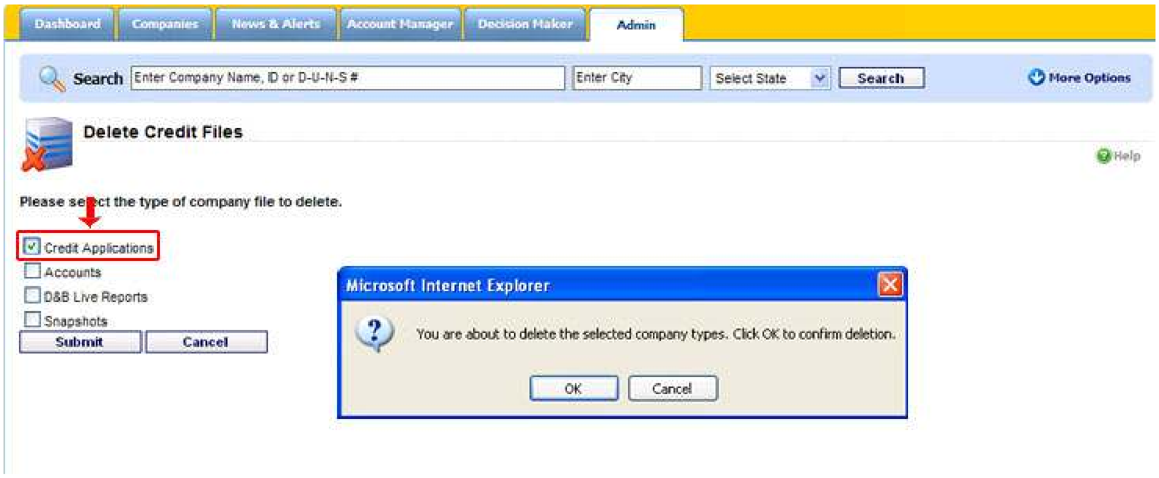

Figure 13

5. Export Data

5.1 Overview

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

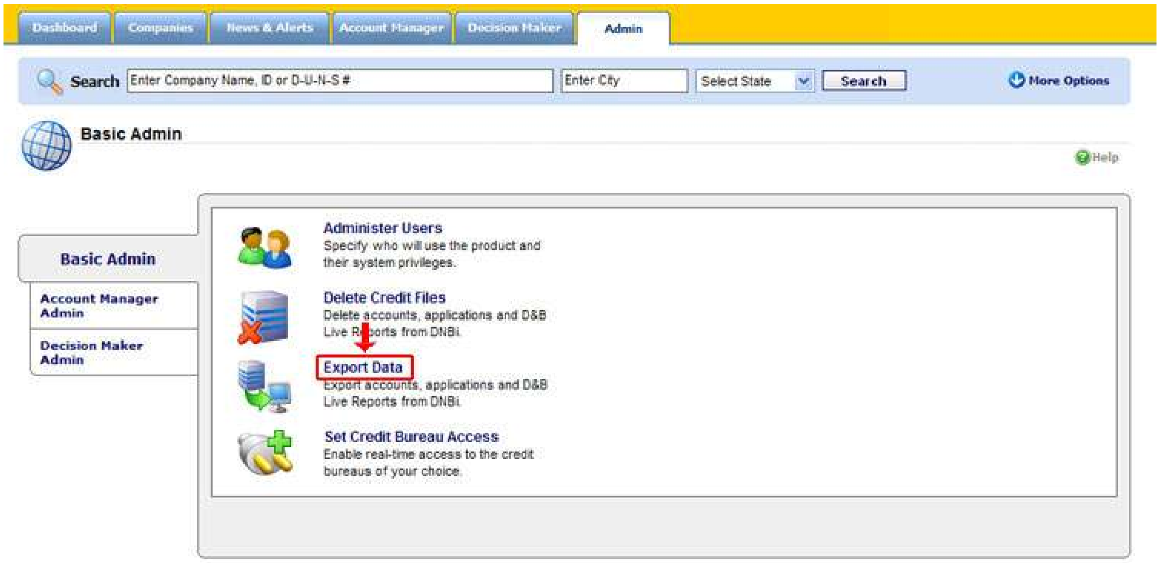

Figure 14

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.

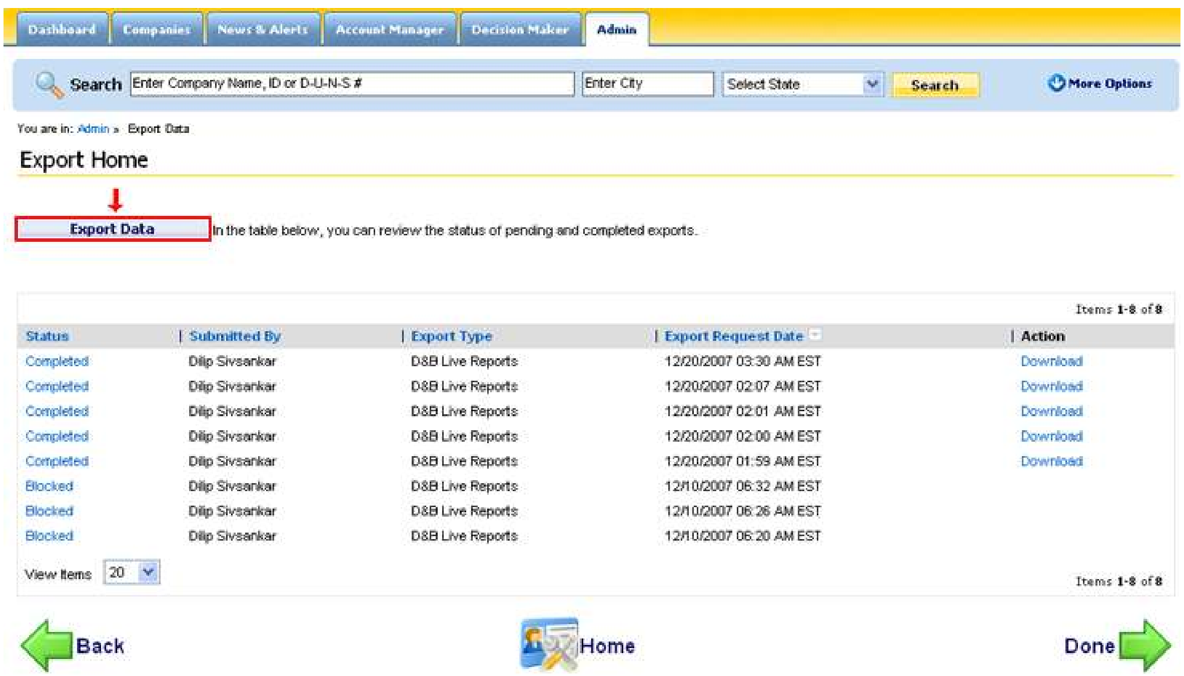

Figure 15

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.

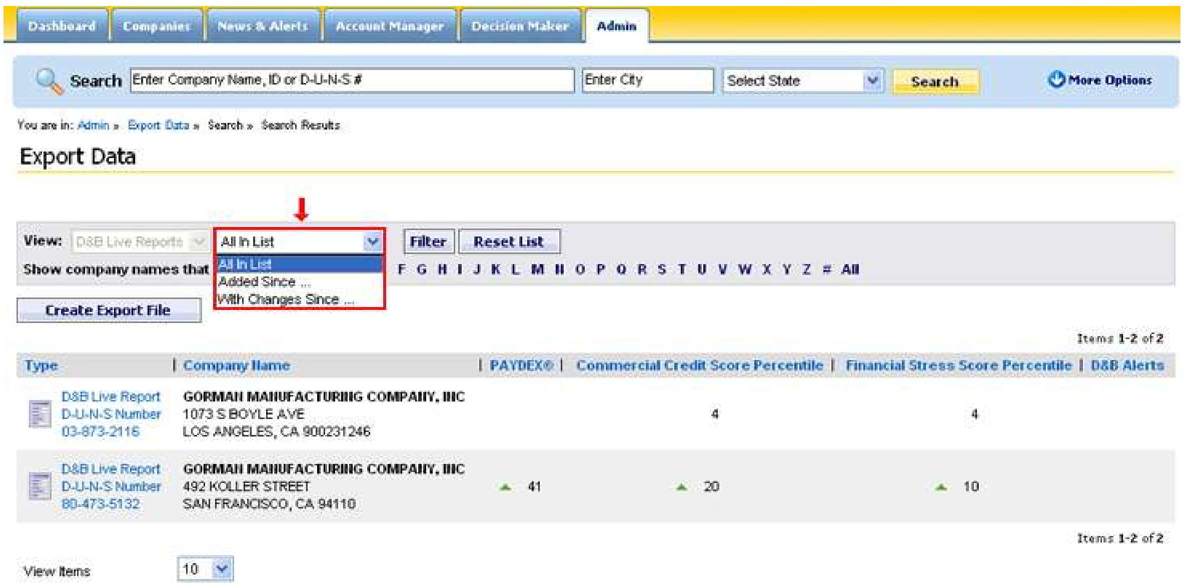

Figure 16

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