DUN & BRADSTREET TASK FORCE PROJECT MANAGEMENT PLAN

Version 7.0
April, 2014
## VERSION HISTORY

<table>
<thead>
<tr>
<th>Version #</th>
<th>Implemented By</th>
<th>Revision Date</th>
<th>Approved By</th>
<th>Approval Date</th>
<th>Reason</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.0</td>
<td>Matt Weeks, AGIIS Product Manager</td>
<td>May 25, 2012</td>
<td></td>
<td></td>
<td>Initial Draft</td>
</tr>
<tr>
<td>2.0</td>
<td>Matt Weeks, AGIIS Product Manager</td>
<td>July 25, 2012</td>
<td></td>
<td></td>
<td>Added Communication plan + work breakdown detail from PCR 184</td>
</tr>
<tr>
<td>3.0</td>
<td>Matt Weeks, AGIIS Product Manager</td>
<td>August 6, 2012</td>
<td></td>
<td></td>
<td>Added section 2.5 - Phase 3 conversion resources</td>
</tr>
<tr>
<td>4.0</td>
<td>Matt Weeks, AGIIS Product Manager</td>
<td>September 7, 2012</td>
<td></td>
<td></td>
<td>Added Phase 3 work breakdown detail from PCR 184 + Additional communication plan details.</td>
</tr>
<tr>
<td>5.0</td>
<td>Matt Weeks, AGIIS Product Manager</td>
<td>October 11, 2012</td>
<td></td>
<td></td>
<td>Updated available web resources</td>
</tr>
<tr>
<td>6.0</td>
<td>Matt Weeks, AGIIS Product Manager</td>
<td>January 2014</td>
<td></td>
<td></td>
<td>Updated timeline for deliverables and approved communications plan</td>
</tr>
<tr>
<td>7.0</td>
<td>Josh Wall, AGIIS Product Manager</td>
<td>April 2, 2014</td>
<td></td>
<td></td>
<td>Updated timeline for deliverables</td>
</tr>
</tbody>
</table>
1 INTRODUCTION

1.1 PURPOSE OF PROJECT MANAGEMENT PLAN

The intended audience of the Duns and Bradstreet Transition Project Management Plan is all project stakeholders including the project sponsor (Duns and Bradstreet Task Force), AgGateway senior leadership and the AGIIS project team.

2 EXECUTIVE SUMMARY OF DUNS & BRADSTREET TASK FORCE

The purpose of the task force is as follows: Develop a plan and process recommendation for an orderly transition away from the use of Dun & Bradstreet numbers and for a verification process to meet current and future needs.

These Dun & Bradstreet based identifiers can be deeply integrated into both the AGIIS system and subscribers systems making an orderly transition away from these to a GLN based identifier of critical importance.


2.1 WORK BREAKDOWN BY PHASE

Phase 1: Stop Requesting verification from Duns & Bradstreet for EBID Numbers and asking for numbers for new entities – All numbers will be assigned by CSC

Phase 2: Start issuing GLN’s for new entities that have EBID’s requested and place the GLN number into both the GLN and the EBID field for newly requested EBID’s.

Phase 3: Replace the current EBID’s with GLN’s in a systematic conversion process. All EBID’s which are not based on a GLN would be removed from the AGIIS database EBID field.

Phase 4: Elimination of the EBID field (out of scope for this project plan)

2.2 CSC PERSPECTIVE

Based on the documentation and work of the Duns & Bradstreet Task Force, CSC has developed a Duns & Bradstreet Task Force Recommendations Technical Overview. From the technical overview, it should be noted:

1. CSC recommends that Phase 1 and Phase 2 be performed concurrently. Phase 1 and Phase 2 predominantly impacts the backend processing within AGIIS and has minimal, if any, impact on subscribers. Additionally, while Phase 3 is dependent upon the completion of Phase 1 and Phase 2, the first two phases provide a very stable working environment that can exist for any period of time in preparation for Phase 3.

2. As with all previous implementations, such as the January 2012 De-duplication implementation, CSC will act as the Project Manager and is responsible for all development and quality assurance associated with the updates, as well as
communication planning & deployment to ensure all AGIIS are notified of upcoming changes.

3. It is our recommendation that Phase 1 and Phase 2 be performed concurrently and within 60 days of AgGateway approval in order to begin to realize cost savings from Duns & Bradstreet and ensure AGIIS is readied for the Entity ID change-over.

2.3 DEPLOYMENT PLAN/ IMPACT

<table>
<thead>
<tr>
<th>Phase 1</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>AGIIS Impact</td>
<td>Low - Only new GLN’s being assigned within AGIIS</td>
</tr>
<tr>
<td>Subscriber Impact</td>
<td>Low - Existing entities will not be impacted in Phase 1</td>
</tr>
<tr>
<td>Considerations</td>
<td>Existing entities within AGIIS will not be impacted with Phase 1 and the process will be virtually transparent for AGIIS subscribers.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Phase 2</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>AGIIS Impact</td>
<td>Low - Only new GLN’s being assigned within AGIIS will be impacted and we recommend Phase 1 and Phase 2 be performed concurrently to further minimize any potential impact to subscribers.</td>
</tr>
<tr>
<td>Subscriber Impact</td>
<td>Low - Minimal subscriber impact due to consistent numbering structure for newly assigned GLN’s. Additionally, all newly assigned GLN’s will be a consistent 13-digit format as current EBID’s (with the exception of four trailing zeros)</td>
</tr>
<tr>
<td>Considerations</td>
<td>Special consideration should be noted for subscribers who are using the trailing four zeros (0000) to identify types of transactions within AGIIS instead of transaction type.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Phase 3</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>AGIIS Impact</td>
<td>Medium – Performing a massive update such as this will occur over a weekend and will have minimal system outage for current AGIIS subscribers.</td>
</tr>
<tr>
<td>Subscriber Impact</td>
<td>Medium – Performing the Phase 3 as a “Big-Bang” approach provides efficiencies in the change over between subscribers and ensures that the change over of Entity ID’s is done in a timely manner. Additionally, because the GLN’s retain the 13-digit format, there are no changes to file formats or subscriber processing.</td>
</tr>
</tbody>
</table>
| Considerations | Because of the nature of this type of update, there are several special considerations needed to assist subscribers with the change-over.  
1. Before/After Entity Subset Extracts – CSC will systematically generate before and after subset/extract files for subscribers to aid in managing the change-over.  
2. CSC will create an online cross reference table (available at AGIIS.org) which will allow subscribers to input an Industry ID and verify the Entity. This will be available online only and for a limited time (90 days)  
3. AGIIS Subscriber communication and education planning |

Phase based on the documentation and work of the Duns & Bradstreet Task Force, CSC has developed a Duns & Bradstreet Task Force Recommendations Technical Overview. From the technical overview, it should be noted:
2.5 PHASE 3 CONVERSION RESOURCES

Based on the documentation and work of the Duns & Bradstreet Task Force, there are a number of resources needed in order to help the subscriber base fully implement the conversion updates that will occur as a part of the Phase 3 implementation.

Subscriber Preparation/Status Checklist available online
CSC and AgGateway will publish and update a subscriber preparation and status checklist in order to educate subscribers on the necessary steps needed to complete in preparation for the Phase 3 implementation in February 2015 and provide documentation on the companies that are fully ready for this change-over.

Before/After Entity Subset Extracts
CSC will systematically generate before and after subset extract files for subscribers to aid in managing the change-over.

Online Look-up Table
CSC will create an online cross reference table which will allow subscribers to input an Industry ID and verify corresponding entity identifiers. This will be available online only and for a limited time. (90 days)

3 SCHEDULE/TIME MANAGEMENT

3.1 MILESTONES/SCHEDULE

Please refer to the table below which lists the milestones for this project, along with their estimated completion timeframe.

<table>
<thead>
<tr>
<th>Milestones</th>
<th>Estimated Completion Timeframe</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phase 1</td>
<td>Completed September 15, 2012</td>
</tr>
<tr>
<td>Phase 2</td>
<td>Completed September 15, 2012</td>
</tr>
<tr>
<td>Phase 3</td>
<td>February 14-15, 2015</td>
</tr>
<tr>
<td>Phase 4 (out of scope)</td>
<td>Deferred to Future Vision Task Force</td>
</tr>
</tbody>
</table>

3.2 WORK BREAK DOWN (PHASE 1 & 2)

**Backend Processes**

- D&B Send and Receive Functionality – Since D&B will no longer be used for EBID origination, the processes used to send EBID Add and EBID Enumeration requests to D&B for enumeration and receive D&B’s response will be removed from AGIIS. The following two functions (AutoAccept and AutoEnumeration) that were formerly performed in the “D&B Receive” process will be handled in the following manner:
  - Auto Accept Processing
“Auto Accept” is the automatic acceptance of the DUNS Number returned by D&B for requests that do not require review by the Help Desk\(^1\) and results in a new entity being added to AGIIS (Add Request) or an EBID assigned to an existing entity (EBID Enumeration Request). Since no DUNS Number will be assigned by D&B, this process is now obsolete and will be eliminated. The completion of the request will take place in real time by the web page, web service, or bulk process submitting the request.

- Auto Enumeration

  “Auto Enumeration” is a sub-function of “Auto Accept” which results in the automatic assignment of an AGIIS Specialty Code\(^2\) in cases where no Help Desk review is otherwise necessary and D&B did not return a DUNS Number. Auto Enumeration functionality will be performed in the following manner:

  - Entity “Add with EBID” Requests from the web will determine if the record must be reviewed by an AGIIS Directory Administrator (henceforth, DA) using the method described in the Entity.IsDirectoryRequest function (see Business Objects section below).

    - If Entity.IsDirectoryRequest determines that no DA review is needed, the request will be completed in real time and enumerated with a GLN based EBID.

    - If Entity.IsDirectoryRequest determines that the request must be reviewed by the DA, the request is queued as a directory request and is not eligible for completion using Auto Duplicate Detection (Request Status = Pending, AAWE Status = Not Required, Auto Duplicate Detect Status = Not Required)

    - If Entity.IsDirectoryRequest determines that the request can be conditionally completed by the Auto Duplicate Detection process, the request is queued as a directory request and evaluated using Auto Duplicate Detection (Request Status = Pending, AAWE Status = Not Required, Auto Duplicate Detect Status = Pending). Auto Duplicate Detection (see below) completes requests that are eligible for automatic completion. The remaining ineligible requests are queued for DA review.

\(^1\) i.e. requests for End Use Businesses with no address override, name override, or special handling instructions (comments). The exact specifications for determining if DA review is necessary are listed in the Business Objects section under Entity.IsDirectoryRequest.

\(^2\) The “Specialty Code” is an “AGIIS Assigned” EBID which starts with AA but otherwise follows the 13-digit EBID convention ending with 0000. It is used in cases where D&B would not assign a DUNS Number but the AGIIS subscriber requested an EBID for an End Use Business and all other Entity Edit Requirements are met.
- **Auto Add With Enumeration**
  
  “Auto Add With Enumeration” is a process that is used to further automate records returned from D&B that do not automatically require Help Desk review and were bypassed by the Auto Accept process due to a “potential duplicate” query match. This process employs the sophisticated FirstLogic matching routines found in the AGIIS Bulk Processing system to determine whether a “true duplicate” already exists in the AGIIS database (occasionally users submit an EBID add request for an entity that already exists in AGIIS identified with only a GLN). When this process detects that an exact match already exists in the AGIIS database and that entity lacks an EBID, it simply assigns the new EBID to the existing record and marks it as “complete”. Records that are not matched to a pre-existing entity are routed to the Help Desk for manual review. Auto Add With Enumeration will be modified in the following manner:
  
  - The Auto Add With Enumeration process will be eliminated from the system but it’s functionality will be transferred to the Auto Duplicate Detection processor (see below).

- **Auto Duplicate Detection**
  
  “Auto Duplicate Detection” was designed to evaluate GLN add requests where the AGIIS web detected a potential exact duplicate. Like AAWE, the process employs the sophisticated FirstLogic matching routines found in the AGIIS Bulk Processing system to determine whether a “true duplicate” already exists in the AGIIS database. Records where no “true duplicates” are detected are eligible to be directly added to the AGIIS database whereas records with a pre-existing “exact” match are routed to the Help Desk for manual review. Auto Duplicate Detection functionality will be modified in the following manner:
  
  - In addition to evaluating GLN add requests, the process will also evaluate EBID add requests. No change is necessary for the “GLN only” add requests.
  
  - For EBID add requests where Help Desk review is not otherwise required:
    
    - Requests with an exact match to an existing GLN only entity will be completed in the same manner formerly performed by Auto Add With Enumeration:
      
      - The existing GLN only entity will be enumerated with a GLN-based EBID and the entity is placed in the requestor’s EBID subset. Data is “harvested” where possible from the Add Request (e.g. the request contains a phone number but the existing entity does not).

---

3 “Exact Match” in this context refers to a “Tight Match” as determined by the sophisticated Bulk Processing matching rules performed by FirstLogic.

4 Determination is made by Entity.IsDirectoryRequest.
• Requests where no exact match is detected will be directly added to the AGIIS database.
  
  o The new entity will be added to the AGIIS database and be enumerated with a GLN-based EBID and the entity is placed in the requestor’s EBID subset

• Overdue Requests Email Process

  o This backend process runs daily and automatically generates an email detailing the status of overdue requests. This process will be modified so that the automated email status codes "1-Sent to Dun & Bradstreet for investigation" and "3-Waiting for Dun & Bradstreet to return results from original request" will no longer be generated.

• AGIIS EBID Bulk Process

  o This backend process runs on request (it must be coordinated with AGIIS Member Services) and is used to submit entities for new addition to AGIIS (enumerated with an EBID) or to identify existing AGIIS EBID entities with an exact demographic match. If an exact demographic match is found, the entity is placed in the submitter’s EBID subset. This process provides redundant functionality and is no longer necessary. The process is obsolete due to the following reasons:

  ▪ Almost all functionality provided by EBID Bulk is currently available using the GLN Bulk process and/or Web Services. GLN Bulk is a regularly scheduled job (running 3 times a day) which can be utilized as needed by subscribers without AGIIS Member Services intervention. AGIIS Web Services can also be utilized on a transactional, real-time basis without AGIIS Member Services intervention. The following provides a cross-reference of EBID Bulk functionality to the functionality which will replace it:

    • Identifier Search – Available as GLN Bulk Identifier Search and Web Services Entity Search-Search by Entity Identifier

    • Demographic Search – Available as GLN Bulk Demographic Search and similar functionality as Web Services Entity Search-Search by Entity Attribute

    • Add to Subset – Available as GLN Bulk Add to Subset and Web Services Entity Maintenance- Add to Subset

    • Delete from Subset – Available as GLN Bulk Delete from Subset and Web Services Entity Maintenance- Delete from Subset
• Add Entity – Available as GLN Bulk “Add GLN”
  
  ▪ The process was primarily designed to be used during the inception of AGIIS to “onboard” subscribers whose initial load required EBID’s. The process has been used a total of 19 times since the inception of AGIIS in 2003 and has not been used since July, 2009.

**AGIIS Web**

• DA Request Search page provides functionality to search for requests to process. These requests were determined using the business rules defined in the Entity.IsDirectoryRequest function to require DA review. As such, the Request Search page is a critical component of the DA workflow. This page’s search options related to D&B send/receive and automated request processing along with processes that restrict presentation of requests that have not been fully evaluated and processed by the D&B automated request processing features will be removed. The default status code settings will be revised to enable accurate request searches. The detail of these changes is as follows:
  
  o Request Status

    ▪ Pending, Sent to D&B: Formerly “Pending” meant “pending transmission to D&B” which was updated to “Sent to D&B” once the transmission was complete. With the installation of this enhancement, the checkbox for “Pending” will be retained and the checkbox for “Sent to D&B” will be removed. The new definition of “Pending” will be requests that have been submitted but have not yet been “Completed” by the Help Desk or “Terminated” by the technical staff. When requests are added to the system the initial status value will be “Pending”.

    ▪ AutoAccepted: This checkbox will be renamed to “AutoProcessed” and will be used to search for records that have been successfully completed by the “Auto Duplicate Detection” process.

  o Auto Add With Enumeration Status

    ▪ All three status values in this column and the “column header” will be removed since this backend process will be eliminated. When requests are added to the system the initial AAWE status value will be “Not Required” and search queries will be modified as necessary to ignore the AAWE status column.

• DA’s View List of Requests page displays the results of the DA Request Search page. The page will be modified to remove information that is no longer relevant.

---

5 The Add GLN transaction provides the same functionality as “Add EBID’ provided by EBID Bulk by insuring that the entity to be added passes all AGIIS edit requirements and does not already exist in AGIIS. The enumeration of the new entity with an EBID is not provided by GLN Bulk but does not appear to be necessary based on historical usage. This functionality can be added to GLN Bulk and/or Web Services in the future, if needed.

6 The action of “Accept” or “Decline” on the Request Detail web page constitutes “Completing” the request.

7 Auto Duplicate Detection already updates the request status to “Auto Accepted” (A) when no duplicate is detected and the entity is successfully added to AGIIS. This pattern will be continued for the new EBID processing that is specified for Auto Duplicate Detection in this enhancement.
- AAWE Status column will be removed
- Duns Status column will be removed
- The first value (D&B) in the “four-part-column” with column header D&B-PVI-DVI-PVC will be removed from the column header and the column itself. This value which represents “Search Disagree with D&B” no longer has meaning.

**DA Request Detail** page provides functionality to review and subsequently accept/decline requests. The design of the page currently shows information returned from D&B on the right side of the page and enables the DA to easily copy data from D&B onto the requested information located on the left side of the page. This page will be modified by:
- The “AAWE Status” label at the top left of the page will be removed
- The “Last Duns Trnx” label at the top right of the page will be removed
- The “View Request Information\View Duns Information” button which allows the DA to toggle the “right hand side of the page” between “Duns Information” and “Requested Change Information” will be removed and the right hand side of the page will show only “Requested Change Information”. This will allow Enumeration requests, Entity Update requests, and Reactivation requests to display the updated information submitted by the user on the right side of the page contrasted against the current entity demographics on the left side of the page. For add requests, since no “new information” will be available from D&B, the information on the left and right hand side of the page will be the same, i.e. it will function as if D&B returned exactly the same information submitted by the requestor.
- Functionality that enables the DA to select the EBID identifier types of “Specialty Code” and “Fertilizer Code” will be removed from the “Get ID” drop down list. The value “GLN-Based EBID” will be added to the list. See Pending Request Conversion section for additional detail on intended usage for this value.
- The page will be modified to use GLN-based EBID enumeration
- The checkbox labeled D&B which is used to indicate a request that is currently being “discussed” with D&B will be removed. Note, this is the same data element that is being removed from the D&B-PVI-DVI-PVC column on the View List of Requests page.
- The Comments drop down list will be reviewed by the AGIIS Product Manager and AGIIS Directory Administrator to determine if any values need to be changed. These values are used along with manual comments in the “Completion Email” that is sent to users when their request is completed.

- **DA View List of Batches** page is a combination Search/List/Detail page used to examine D&B batch status. This page is also used to send records submitted in an “EBID Initial Load” or “EBID Bulk Submission” to D&B for enumeration and subsequently creates a billing report for the subscriber. This page will be modified by:
  - This page is obsolete with this enhancement and will be removed from the AGIIS Administration menu.
• **AGIIS Home** page displays links to “Adds Pending” (add requests not yet sent to D&B) and “Adds at Dun and Bradstreet”. This page will be modified by:
  ○ Removing these links and the remaining statistics will be modified to display the request count from the “Adds Under Review” link.

• **Links Menu** contains links to various informational and documentation sources. This page will be modified by:
  ○ Removing the E-Business menu item links
    ▪ EBID Initial Load (ASCII)
    ▪ NAPD/EBID/GLN Bulk Submission (XML)
  ○ Change GLN menu item link
    ▪ Change NAPD/EBID/GLN Bulk Submission (XML) to GLN Bulk Submission (XML)

• **View Pending Requests (Detail) Page** is a page invoked from the View Entity page that allows the user to page through pending requests. This page will be modified by:
  ○ Only requests in “Pending” request status will be displayed instead of requests in “Pending” or “Sent To D&B” status.

• **View Entity Detail Page** displays the entity demographics and has a button to View Pending Requests that is conditionally enabled based on the presence of pending requests. This page will be modified by:
  ○ Query to enable View Pending Requests button will be modified to search for requests in “Pending” request status instead of requests in “Pending” or “Sent To D&B” status.

• **Add Entity** page is the data entry screen used to create entity requests. The DA’s view of the page allows for selection of the type of EBID to be assigned to the entity; “Specialty Code” or “Fertilizer Code”. This page will be modified by:
  ○ The values “Specialty Code” and “Fert Code” will be removed from the “Get ID” drop down list. When requested, enumeration of an EBID will be deferred to the Entity Duplicates page where a GLN-based EBID will be assigned.
  ○ This page is also used in “EBID Enumeration” mode and the same changes will apply when used in this mode.

• **View Duplicates** page is used at the end of the Entity Add\Update\Reactivate\Request EBID Enumeration workflow to display potential duplicates of the requested entity. If there are no duplicates (or the user determines that the potential duplicates are “false positives” and ignores the warning), the page uses the Entity.IsDirectoryRequest function to determine whether the record can be processed immediately or must be queued for DA review. This page will be modified:
  ○ Identify Entity Add requests (with EBID) and EBID Enumeration requests that can be immediately completed using the updated Entity.IsDirectoryRequest function. For such requests, the request will be fulfilled immediately by:
    ▪ For Entity Add requests, add the entity into AGIIS and add the EBID subset record. The EBID generated will be GLN-based.
For EBID Enumeration requests, update the entity demographics (if changed) and add the EBID subset record. The EBID generated will be GLN-based.

- Identify Entity Add requests (with EBID) and EBID Enumeration requests that must be reviewed by the AGIIS Help Desk (see Entity.IsDirectoryRequest). For such requests, the request will be processed by:
  - Add a directory request record. The request status will be “Pending”, the AAWE status will be “Not Required”, and the ADD status will be “Not Required”.
- Identify Entity Add requests (with EBID) and EBID Enumeration requests that potentially can be completed by the Auto Duplicate Detection process, (see Entity.IsDirectoryRequest). For such requests, the request will be processed by:
  - Add a directory request record. The request status will be “Pending”, the AAWE status will be “Not Required”, and the ADD status will be “Pending”.

AGIIS Reporting Services produces reports that provide information on the Help Desk request processing workload. The logic used to generate the reports will be changed so that the D&B process statuses are not included as selection criteria. Changes will include the following:

- Complete\Pending Report – Count of records received/pending resolution and those completed during the time frame specified. Counts include requests that are:
  - Pending AAWE (this count will be eliminated)
  - Pending ADD
  - Post AAWE & ADD (this count will be changed to Post ADD only)
  - All D&B status
- Auto Processed Report - Count of records processed by AAWE & ADD after D&B returned data. This report will be changed to count only records automatically completed by the ADD process.

**Business Objects**

- Entity Business Object: requires update of IsDirectoryRequest function to determine if a request should be a direct database update or queued for DA review as a directory request record. The following conditions require queuing for DA review:
  - Request for Entity Reactivation
  - Request for Entity Add with EBID or request for EBID Enumeration
  - Entity Type <> End Use Business

---

8 The actions are queued for DA review only when performed by a non-DA. When a DA performs the actions, they are directly updated to the AGIIS database without further review.
The following apply to Request Types Entity Add, Entity Update, and EBID Enumeration

- Comments entered (applies to Web only)
- Address Override entered (applies to Web only)
- Name Override entered (applies to Web only)
- Duplicate Exemption entered (applies to Web only)
- Entity Status updated to “Bought Out”, “Replaced”, or “Out of Business” (applies to Web updates only)
- Soundex DBA Name Match + Exact Address Match (applies to Web only)

The following apply to Request Type Entity Update

- A pending EBID Enumeration request exists for this entity
- The entity has an EBID and the entity type has been changed from a “Trading Partner”9 to a “Non-Trading Partner”10 or changed from a “Non-Trading Partner” to a “Trading Partner”

If none of the previously listed conditions mandate DA review, the following condition makes the request eligible for automatic completion by the Auto Duplicate Detection process. After Auto Duplicate Detection evaluation, requests that are not automatically completed are forwarded for DA review (applies to Request Types Entity Add, Entity Update, and EBID Enumeration).

- Soundex Individual Name or Company Name Match + Exact Address Match (and End User Business)

**Industry Identifier Business Object:**

- Eliminate edit rule “EBID must end with 0000”
- Retire the GetNextSpecialtyID method of identifier assignment
- Retire the GetNextFertilizerID method of identifier assignment
- Create new GetNextEBIDasGLN method of identifier assignment

**Directory Request Business Object:**

- Modify the Insert method to
  - Automatically create corresponding “Duns Request” (duns_rqst) row to emulate a request that has been sent to D&B as appropriate for EBID add requests and EBID Enumeration requests
  - Automatically create corresponding “Duns Response” (duns_resp) row to emulate a request that has been returned by D&B as appropriate for EBID add requests and EBID Enumeration requests. The Duns Response row will emulate a “no match” return from D&B.
  - Set Request status to “Pending”
  - Set AAWE status to “Not Required”
  - Set ADD status as appropriate
    - Any request that has mandatory DA review, set the ADD status as “Not Required”. See Entity.IsDirectoryRequest function for the list of conditions requiring DA review.
    - Any request not requiring DA review, set the ADD status as “Pending”

---

9 “Trading Partner” has entity type of Distributor or Manufacturer or Industry Provider or Retailer
10 “Non-Trading Partner” has entity type of Farm Business or Grower or End Use Business or Rail Siding or Terminal or Drop Point.
Pending Request Conversion

- A conversion will be necessary for any request that is “pending” at the time this enhancement is installed in order to update “status” information to the new design. The following conversion steps will be performed:

  o The “D&B Send” automated processes will be run a final time prior to the enhancement installation and then disabled so that no more requests are sent to D&B (ecommpapp01 scheduled tasks “Watchdog - Send Automated” and “Watchdog - Send Investigate”). The final “Send” execution will update dir_rqst.dir_rqst_stat_cd from “Pending” to “Sent” and will add a duns_rqst row for each request as is done when a request is “sent” to D&B.

  o The “D&B Receive” automated process (ecommpapp01 scheduled task “Watchdog – Check Responses” ) will be run a final time so that any responses that have been completed by D&B will be accepted into AGIIS before the enhancement is installed. Following the final “receive”, the scheduled task will be disabled.

  o The “Auto Add With Enumeration” automated process (cscapplxa003 scheduled task “AGIIS - AAWE”) will be run a final time so that pending AAWE-eligible requests can be completed. Following the final execution, the scheduled task will be disabled.

  o The “Auto Duplicate Detection” automated process (cscapplxa003 scheduled task “AGIIS – ADD-AutoDupDetect” ) will be run a final time so that pending ADD-eligible requests can be completed. Following the final execution”, the scheduled task will be disabled.

  o The enhancement is installed. Before the software installation is performed however, the following data conversion steps will be performed:

    - A conversion program (or query) will be run which will perform the following function:

      - For any request where dir_rqst.dir_rqst_stat_cd = ‘S’ and no record has yet been returned from D&B, add a record to the duns_resp table emulating a returned record from D&B where no match was found.

    - Conversion queries which will update D&B requests that are currently being processed by D&B to the new status design values

      - Update agiisprod.dir_rqst set dir_rqst_stat_cd = ‘P’ where dir_rqst_stat_cd in (‘P’, ‘S’)

      - Update agiisprod.dir_rqst set dir_aawe_stat_cd = ‘N’ where aawe_stat_cd = ‘P’
Following installation of this enhancement it is expected that there will be requests that have been received from D&B prior to the “Final Receive” (or as a result of it), but have not yet been completed by AGIIS Member Services. AGIIS Member Services will be able to process these requests and “Accept” the Duns-Based EBID returned by D&B, or, if necessary, override the Duns-Based EBID using the “GLN-Based EBID” value in the Get ID drop down list\(^{11}\).

3.3 **WORK BREAK DOWN (PHASE 3)**

Implementation for Phase 3 will occur on the weekend of **February 14-15, 2015**.

The Phase 3 recommendations will eliminate the use of D&B numbering system in AGIIS and replace all existing EBID identifiers (not already based on GLN) with the GLN (Global Location Number) assigned to each entity using a mass update. All organizations using EBID’s should begin using the new numbers within a short period of time from the identifier updates in AGIIS.

To aid in the conversion process, CSC will create 2 EBID Subset Extract files for each subscriber - a before conversion file and an after conversion file in ASCII format only. These files will be dropped into the FTP site and an email notification will be sent to each subscriber’s primary contact when their files are available. Subscribers can also schedule their own EBID Subset Extract file in ASCII or XML format from the Files/Schedule Extracts menu within AGIIS.

A cross reference table will be available online and accessible to users for a limited period of time (90 days). This cross reference table will be stored on the AGIIS system and available for lookups using a temporary new search feature on the AGIIS web site and a temporary new web service. The cross reference table information would not be available for download or export.

Additionally, AGIIS currently hosts three FTP sites because of legacy architecture going back to the three directories that comprised AGIIS prior to 2003. AGIIS FTP sites currently use the subscriber’s EBID as the user name or folder identifier. Changes made to the FTP sites will require subscribers who use the those sites to make small changes to automated and/or manual processes used to upload and download files so that new URL, folder names and log in credentials are used.

---

\(^{11}\) Duns-Based EBID override, although not common, is occasionally performed by AGIIS Member Services when the Duns Match returned by D&B was inaccurate. In these cases, where an “Specialty Code” EBID was formerly assigned, the GLN-Based EBID will now be assigned.
Requirements:

<table>
<thead>
<tr>
<th>Requirements</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Replace EBID Value with GLN Value</strong></td>
<td></td>
</tr>
<tr>
<td>Replace all non-GLN EBID Values with GLN Value</td>
<td></td>
</tr>
<tr>
<td>Delete all (non-GLN value) EBID Identifier History (Old Duns Number based EBID must be completely removed from AGIIS in order to eliminate the D&amp;B license fees.)</td>
<td></td>
</tr>
<tr>
<td>Create and populate a new Oracle Cross Reference table. The new Oracle table will be used to provide the short-term cross reference search capabilities (web site and web service).</td>
<td></td>
</tr>
<tr>
<td><strong>Create Pre-Conversion and Post-Conversion EBID Subset Extracts (.csv format only)</strong></td>
<td></td>
</tr>
<tr>
<td>Create a new (short term) program to invoke existing EBID Subset Extract generation functionality in .csv format for all active “Full Privilege” subscribers.</td>
<td></td>
</tr>
<tr>
<td><strong>Create New Search Functionality for EBID to GLN Cross Reference</strong></td>
<td></td>
</tr>
<tr>
<td>Create new (short term) web site search functionality for EBID to GLN Cross Reference</td>
<td></td>
</tr>
<tr>
<td>Create new (short term) web service search functionality for EBID to GLN Cross Reference</td>
<td></td>
</tr>
<tr>
<td><strong>AGIIS FTP Site Conversion (Eliminate Use of EBID as User ID/Folder Names)</strong></td>
<td></td>
</tr>
<tr>
<td>Create new FTP file structure, file names and log in credentials</td>
<td></td>
</tr>
<tr>
<td>Change the website Files/Upload and Files/Download features to recognize the new FTP site and folder configuration.</td>
<td></td>
</tr>
<tr>
<td>Change the following AGIIS bulk processes to work properly with the new FTP site:</td>
<td></td>
</tr>
<tr>
<td>• GLN Bulk</td>
<td>• License Import</td>
</tr>
<tr>
<td>• GLN Update Extract</td>
<td>• Agreement Import</td>
</tr>
<tr>
<td>• EBID Update Extract</td>
<td>• Product Export</td>
</tr>
<tr>
<td>• Entity Subset Extract</td>
<td>• License Export</td>
</tr>
</tbody>
</table>

4 QUALITY MANAGEMENT/ USER ACCEPTANCE TESTING

As designated project manager, CSC will act as Quality Assurance/Testing and will coordinate development timelines with input from the Duns & Bradstreet Task Force to
assist with any functional testing needs.

5 DOCUMENTATION

5.1 ALL EBID RELATED TOPICS MUST BE UPDATED TO INCORPORATE THE SIGNIFICANT CHANGES MADE DURING THE D&B TRANSITION PHASES 1 AND 2. DOCUMENTATION REQUIRING UPDATES INCLUDE:

- AGIIS Help for this page
- Tutorials
- Documents supporting file formats found on the Links menu
- Entity Rules Document
- External Design Document
- Operational Procedures document

6 STAKEHOLDER COMMUNICATIONS

6.1 COMMUNICATIONS PLANNING

To ensure consistent communications that reaches the entire subscriber base, the communications matrix will include:

- Member Services communications/outreach
- AgGateway eNewsletter articles/announcements
- AgGateway Web site articles/announcements
- AGIIS.org Web site announcements
- AGIIS Subscriber email communications

Communications Tactics

- Acknowledgement Letters
- D&B Transition White paper/Project management plan
- Dedicated web page on AgGateway.org
- Monthly Email communications
  - Includes a countdown to transition

Member Services outreach

- Coordinated outreach via Member Services to ensure process and timeline awareness and encourage active participation in on going Webinar series.
    - Project Brief review
    - Review Project implications
    - Encourage trading partner communications and provide talking points

Communications Schedule

AgGateway Monthly Newsletter

- Timing: March 2014 through January 2015
  - Countdown to Transition
  - Reminder of impact and Phase 3 implications
• AgGateway Web site
    ▪ Countdown to Transition
    ▪ Reminder of impact and Phase 3 implications
    ▪ Downloadable talking points

• AGIIS.org Subscriber communications
  ○ Timing: February 2014 through January 2015
    ▪ Countdown to Transition
    ▪ Reminder of impact and Phase 3 implications
    ▪ AGIIS.org Web site
    ▪ Countdown to Transition
    ▪ Reminder of impact and Phase 3 implications
    ▪ Downloadable talking points

• More information on the Duns & Bradstreet Task Force and a listing of the Webinars and Frequently Asked Questions is available at:

Appendix A: Project Management Plan Approval

The undersigned acknowledge they have reviewed the Duns & Bradstreet Task Force Project Management Plan and agree with the approach it presents. Changes to this Project Management Plan will be coordinated with and approved by the undersigned or their designated representatives.

Signature: _______________________________ Date: ____________
Print Name: ______________________________
Title: ________________________________
Role: ________________________________

Signature: _______________________________ Date: ____________
Print Name: ______________________________
Title: ________________________________
Role: ________________________________

Signature: _______________________________ Date: ____________
Print Name: ______________________________
Title: ________________________________
Role: ________________________________