

*Siebel 8.0 Essentials*

# Module i: Siebel 8.0 Essentials Training



# Module Agenda

---

- This module provides an introduction to the:
  - Instructor and class participants
  - Training site information
  - Course:
    - Audience
    - Prerequisites
    - Goal
    - Objectives
    - Methodology
    - Materials
    - Agenda

# Instructor and Class Participants

---

- Who are you?
  - Name
  - Company
  - Role
- What is your prior experience?
  - Siebel Applications
  - Relational database
- How do you expect to benefit from this course?

# Training Site Information

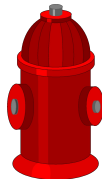
- Bathrooms



- Telephones



- Fire Exits



- Class duration and breaks



- Meals and refreshments



- Questions?



# Course Audience

---

- This course is designed for implementation teams
  - Application developers
  - System architects and configurators
  - Database administrators
  - Systems administrators

# Course Prerequisites

---

- Basic Windows or NT navigation and file-management skills
- Understanding of basic relational database concepts
- Familiarity with application development
- Familiarity with Web-based and client/server applications

# Course Goal

---

- To enable participants to identify and perform tasks required for an initial Siebel 8 Application deployment

# Course Objectives

- Navigate the Siebel application user interface
- Secure access to Siebel applications and data
- Define your company structure
- Describe the Siebel application architecture
- Describe the steps required to install Siebel application software to set up your enterprise
- Configure a Siebel application
- Automate business rules in your Siebel application
- Populate and migrate data into the Siebel database
- Migrate data between environments



# Course Methodology

---

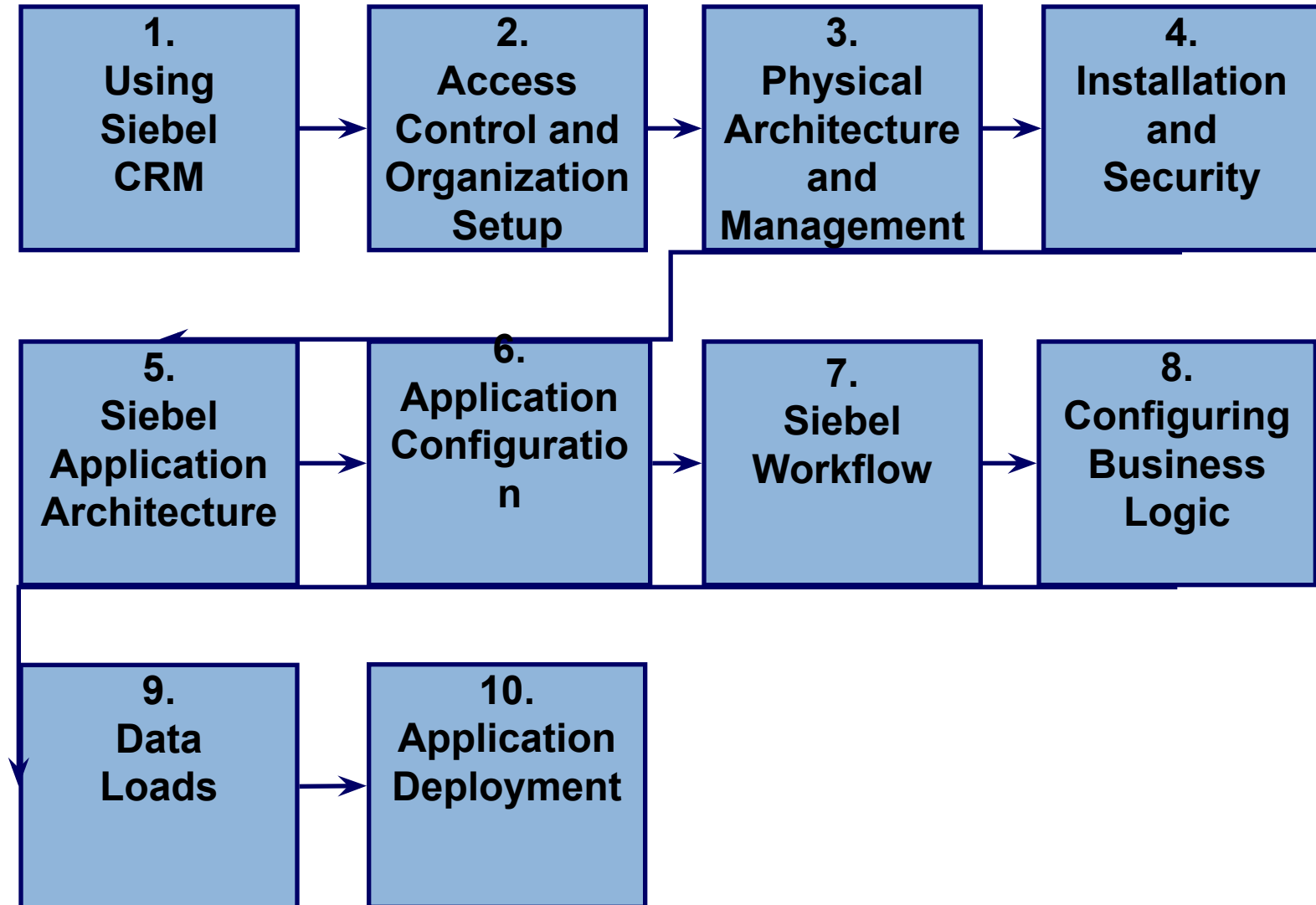
- Subject matter is delivered via:
  - Lecture and slide presentations
  - Software demonstrations
  - Class discussions
  - Hands-on labs

# Course Materials

---

- Student Guide
  - All slides presented during lecture
  - Notes that point to Siebel Bookshelf references
- Lab Guide
  - Hands-on lab exercises and solutions

# Overview of Course Flow



# Course Agenda

- Using Siebel CRM
  - 1: Introducing Siebel Applications
  - 2: Using the Siebel Web Client
  - 3: Working with Siebel Data
- Access Control and Organization Setup
  - 4: Responsibilities and Views
  - 5: Users, Positions, and Organizations
  - 6: Controlling Access to Customer Data
  - 7: Catalogs and Master Data
- Physical Architecture and Management
  - 8: The Siebel Web Architecture
  - 9: Server Components and Parameters
  - 10: Server Management
  - 11: Siebel Client Types

# Course Agenda Continued

- Installation and Security
  - 12: Securing Access to the Application
  - 13: Installing Siebel Applications
- Siebel Application Architecture
  - 14: Siebel Application Architecture
  - 15: Using Siebel Tools to Examine Object Definitions
  - 16: The Siebel Data Model
  - 17: Siebel Business Components
  - 18: Siebel Party Business Components
  - 19: Siebel Business Objects
  - 20: Configuration Strategy
  - 21: The Configuration Process

# Course Agenda Continued

## ■ Application Configuration

- 22: Managing Object Definitions
- 23: Editing and Compiling Object Definitions
- 24: UI Layer Configuration: Web Templates
- 25: UI Layer Configuration: Applets
- 26: UI Layer Configuration: Applications, Screens, and Views
- 27: UI Layer Configuration: Drilldowns
- 28: Business Layer Configuration: Joins
- 29: Business Layer Configuration: Existing Business Components and Fields
- 30: Business Layer Configuration: New Business Components and Fields
- 31: Business Layer Configuration: Picklists
- 32: Configuring Multi-Value Groups
- 33: Data Layer Configuration

# Course Agenda Continued

- Siebel Workflow
  - 34: Siebel Business Services
  - 35: Building Siebel Workflow Processes
  - 36: Testing and Deploying Workflow Processes
  - 37: Executing Workflow Processes
  - 38: Using Workflow Policies
- Configuring Business Logic
  - 39: Siebel Task UI
  - 40: Task UI: Creating a Task
  - 41: Transient Business Components and Branching
  - 42: Siebel Business Rules
  - 43: Creating Business Rules
  - 44: Introducing Siebel Assignment Manager
  - 45: Creating Assignment Rules
  - 46: Tailoring Assignment Manager Behavior

# Course Agenda Continued

- **Configuring Business Logic (Continued)**
  - 47: Invoking Siebel Assignment Manager
  - 48: State Models
- **Data Loads**
  - 49: Introducing Enterprise Integration Manager
  - 50: Creating Data Maps
  - 51: Running Enterprise Integration Manager
- **Application Deployment**
  - 52: Introducing Application Deployment Manager
  - 53: Deploying Application Customizations



# Summary

---

- This module provides an introduction to the:
  - Instructor and class participants
  - Training site information
  - Course:
    - Audience
    - Prerequisites
    - Goal
    - Objectives
    - Methodology
    - Materials
    - Agenda