

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



- Class duration and breaks



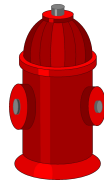
- Telephones



- Meals and refreshments



- Fire Exits



- 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

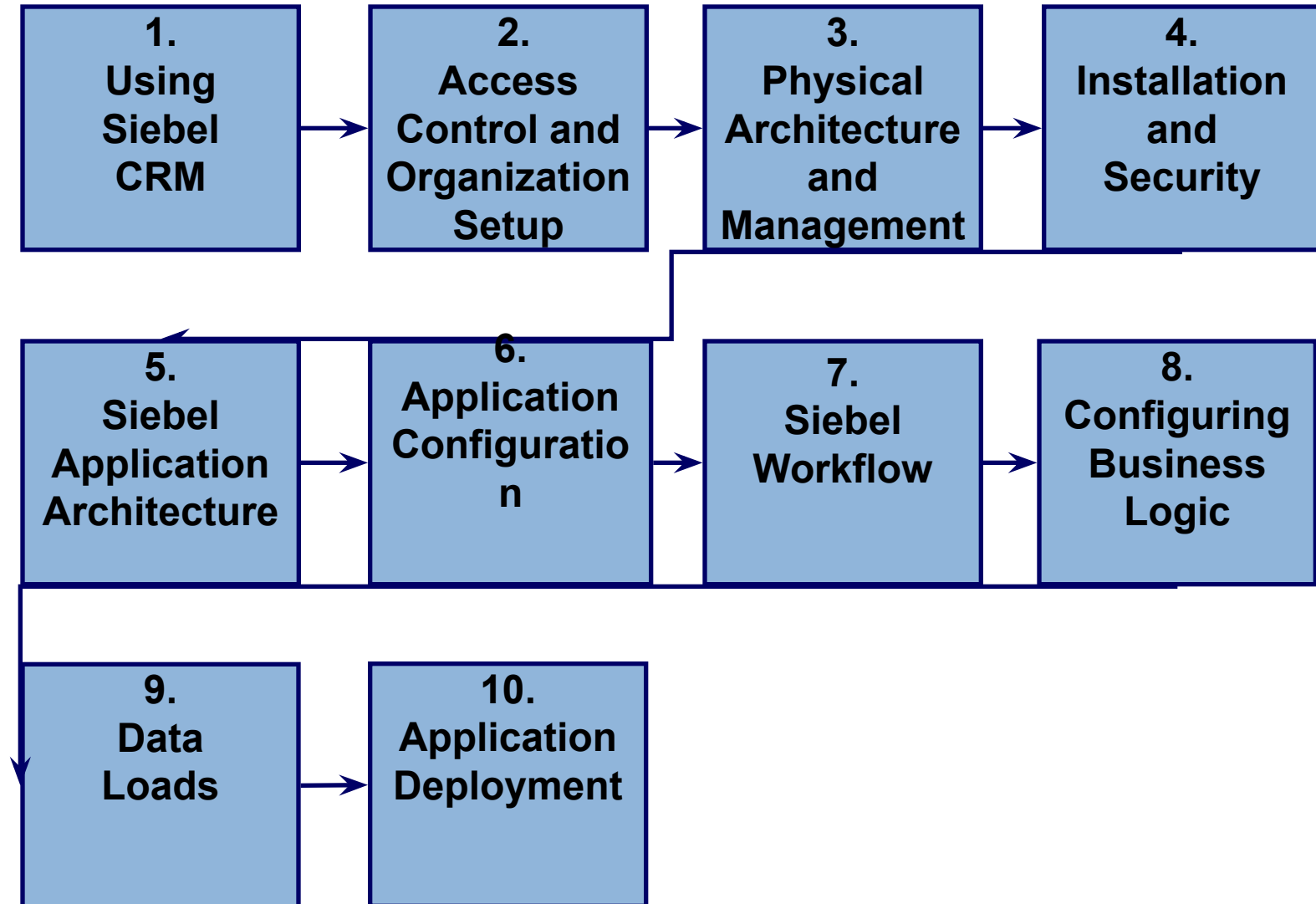
Course Methodology

- 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

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