

Fundamentals for Business Analysts (Siebel 8.0)

Duration: 5 Days

What you will learn

Siebel 8.0 Fundamentals for Business Analysts examines Siebel applications in two dimensions. The first dimension, breadth, is covered two days of the course where students become familiar with the defining features of Siebel applications, such as Siebel Sales, Siebel Call Center, and Siebel Field Service. Students also explore Siebel automation options, such as Siebel Workflow, Assignment Manager, and Task UI. All of this exploration is reinforced with hands-on exercises with Siebel applications.

The second dimension, depth, is provided in the last three days of technical training, which provides business analysts knowledge and skills they need to participate in a Siebel implementation project. Students come away from the course with an appreciation of the logical structure of Siebel applications. Students explore key topics, such as the Siebel Web architecture, data access, and implementation best practices. In the final half of this technical section of this course, students use Siebel Tools to explore application customizations. Key topics include modifying the business logic and user interface to Siebel applications and using Siebel automation.

Learn To:

Navigate Siebel applications

Use a wide range of Siebel application functionality

Translate user requirements into technical specifications

Explore application configuration options using Siebel Tools

Audience

Business Analysts

Project Manager

Technical Consultant

Prerequisites

Required Prerequisites

Navigating Siebel 8.0 Applications Self-Study CD Course

Course Objectives

Navigate and work with data in Siebel applications

Use common Siebel business entities

Use common Siebel Sales features

Use common Siebel Call Center features

Use common Siebel Field Service features

Describe best practices for a Siebel implementation project

List the components of the Siebel Web architecture

Control access to views and customer data in a Siebel application

- Create a company structure
- Use Siebel Tools to examine object definitions
- Describe how business and UI layer objects can be modified to meet user requirements
- Use Siebel Workflow, Assignment Manager, and Task UI to meet user automation requirements
- Design iHelp items to assist end users
- Specify global deployment options for a Siebel application

Course Topics

Navigating and Working with Data in the Siebel Interface

- Introducing Siebel CRM Applications
- Navigating Siebel applications
- Creating, modifying, and deleting records
- Querying for data

Common Siebel Business Entities

- Representing customers with Accounts and Contacts
- Describing tasks with Activities
- Defining sales-related objects with Opportunities and Quotes
- Resolving customer issues with Service Requests
- Using Siebel business entities to implement business practices

Siebel Application Functionality

- Siebel Sales scenario: Opportunity Management
- Siebel Sales scenario: Forecasting
- Other Siebel Sales Features
- Siebel Call Center: service scenario
- Siebel Call Center features (SmartScripts, Service Analytics, Hotelling and Multi-tenancy)
- Siebel Field Service scenario
- Assets and Warranties

Siebel Automation and Other Application Features

- Siebel Workflow
- Siebel Assignment Manager
- Siebel Task UI
- Other features (Siebel Search, Audit Trail, Reports, iHelp, Siebel Tools)

Best Practices for Siebel Implementations

Exploring the Siebel Architecture

- Server-side components of the Siebel Web Architecture
- Siebel client types

Access Control

- Securing Siebel Applications
- Controlling access to views
- Controlling access to customer data
- Creating a company structure

Exploring the Siebel Application Architecture

- Understanding object definitions behind the Siebel user interface (UI)

Examining object definitions with Siebel Tools

Specifying Siebel Application Customizations

The Siebel Data Model

Siebel business components

Siebel business objects

Picklists and multi-value groups

Customizing UI elements

Specifying Siebel Automation

Defining Siebel Workflow

Using Assignment Manager to assign records

Automating user interactions with Task UI

Creating iHelp Items to Assist Users

Preparing for a Global Deployment