

## Siebel 8.0 Universal Customer Master

**Duration:** 3 Days

### What you will learn

The UCM 8.0 course is designed for business users and technical data stewards alike, who are involved in an MDM customer data integration (CDI) implementation. Through a combination of presentation slides and hands-on exercises, participants will learn how to perform the basic functional administration tasks in UCM. This includes understanding how data is entered, reduplicated and then shared.

Participants will also gain insight on UCM architecture, its data model and how other products can integrate with UCM for added functionality. The course covers topics such as Oracle Data Quality Matching Server, Oracle Data Quality Cleansing Server, Oracle Data Watch & Repair (DWR) and Privacy Management products. The course is focused on both end-user tasks that are used frequently and configuration tasks done at initial setup.

**Learn To:**

- Describe the UCM data model and architecture
- Administer UCM, DWR and Oracle Data Quality tools
- Configure and perform incremental loads into UCM
- Implement inbound and outbound data flows from UCM

### Audience

- End Users
- Functional Implementer
- Project Manager

### Prerequisites

- Required Prerequisites*
- Siebel 8.0 Essentials

### *Suggested Prerequisites*

- Participants should be familiar with Siebel applications

### Course Objectives

- Understand how Universal Customer Master solution works
- Manage the data throughout its customer lifecycle
- Setup data matching and cleansing for incoming data into UCM
- Setup the matching thresholds for data consolidation
- Create survivorship rules that mandate data merges
- Publish best-version records to subscribing systems
- Manage hierarchies and importing D&B data into UCM
- Perform privacy management
- Load data into UCM using EIM and the UCM batch workflow
- Perform data profiling on key UCM tables using Data Watch and Repair

## Course Topics

### **Introduction to Master Data Management (MDM)**

Understanding MDM  
Implementing MDM with UCM  
What is the Oracle MDM Portfolio?

### **Customer Lifecycle Management**

Setting up data matching and cleansing  
Setting up survivorship rules for data consolidation  
Merging and unmerging records  
Distributing best-version data to spoke systems

### **Hierarchy Management**

Viewing and managing hierarchies in UCM  
Using D&B integration to populate hierarchical data

### **Compliance**

Understanding UCM's privacy  
Understanding UCM audit trail

### **Data Watch and Repair**

Setting up data profiling for UCM tables  
Applying data rules to profiling results  
Creating one-time corrections  
Writing back corrections to UCM through EIM tables

### **UCM Data Model**

Understanding UCM entities and their architecture

### **Batch Import process**

Load data into UCM using EIM and UCM Batch workflow

### **Advanced Functions**

Extending and configuring a child object  
Extending data import functionality

### **Setting up Data Quality with ISS**

Understanding the general setup and configuration for Data Quality in UCM  
Installing and configuring ISS server to work as Data Quality engine for UCM

### **Oracle Data Quality**

Understanding Oracle Data Quality (ISS) architecture in detail  
Configuring Oracle Data Quality Matching servers (setting match levels and search levels)

### **Acxiom Integration**

Understanding content enrichment  
Describing overall integration architecture  
Identifying steps to configure a real-time point to point integration with Acxiom

### **Data Integration**

Understanding UCM application integration

Sending a UCM message  
Using UCM Server Party Workflows  
Publishing and subscribing

**Implementation Best Practices**

Setting objectives for your MDM implementation  
Understanding the challenges in achieving MDM  
Best Practices Case Study