

Siebel 8.1.x Business Automation

Duration: 5 Days

What you will learn

In this course, students learn fundamental technologies and techniques for automating business processes in Siebel applications. The curriculum focuses on core technologies that are used in many Siebel automation facilities, such as business services and Siebel workflow. Students get hands-on experience with Siebel automation and create solutions to simple and more complex automation problems.

Siebel business automation is implemented both in Siebel Tools and in the Siebel client, and this course presents a discussion of both. Students configure workflow processes and task flows in Siebel Tools, as well as implementing workflows for Siebel Universal Inbox and for Siebel Data Validation Manager. In the Siebel Web client, students implement Siebel State Models, Siebel SmartScripts, and configure assignment rules. Students also learn the role of scripting in automating Siebel applications.

Learn to:

- Create workflows to automate business processes
- Configure the Siebel Inbox
- Create tasks to guide users through complex procedures
- Use Siebel client facilities for automation
- Use Siebel Assignment Manager to assign business data to users

Audience

Application Developers
Developer
Project Manager
Technical Administrator
Technical Consultant

Prerequisites

Required Prerequisites

Siebel 8.0 Technical Foundations - RWC

Course Objectives

- Create, test, and deploy Siebel workflow processes
- Enable Siebel Inbox access for existing data types
- Build validation rule sets for Siebel Data Validation Manager
- Create, test, and deploy user-interactive automation using Siebel Task UI
- Describe the role of scripting in Siebel business automation
- Use Siebel SmartScript to script employee interactions with customers
- Use Siebel State Model to enforce business requirements
- Assign business data efficiently using Siebel Assignment Manager

Course Topics

Siebel Business Services

- Describing a business service
- Describing the structure and role of property sets
- Using the business service simulator to test a business service

Creating and Deploying Siebel Workflow Processes

- Creating a workflow process using Siebel Tools
- Testing workflow processes using the Workflow Simulator
- Publishing and activating workflows
- Describing the Siebel Workflow architecture
- Creating robust workflows using sub-processes and queries
- Invoking workflows with run-time events and custom controls
- Using workflow policies to invoke workflow processes

Configuring Siebel Universal Inbox

- Enabling an existing data type for the Inbox

Using Siebel Data Validation Manager

- Creating and activating validation rule sets
- Invoking Data Validation Manager from a workflow or run-time event

Using Siebel Task UI

- Describe the features of Siebel Task UI
- Invoke and complete a task
- Configure and administer a task
- Configure branching logic in a task using transient business components
- Use task properties in task steps
- Configure an instance identifier for the user inbox
- Use the task debugger to examine task properties

Introducing Siebel Scripting

- Describing appropriate uses for scripting in Siebel business automation
- Identifying scripted objects in Siebel Tools

Creating SmartScripts to automate customer interactions

- Describing the features of SmartScript
- Identifying the elements that make up a SmartScript
- Create a basic Siebel SmartScript
- Personalizing a SmartScript with user properties
- Customizing data displayed in a SmartScript with search specifications and picklists
- Add Siebel eScript to a SmartScript

Using Siebel State Model

- Describe how state models can enforce business logic
- Create a new state model

Assigning Business Data with Siebel Assignment Manager

- Explaining the role of Siebel Assignment Manager
- Describing the components of assignment rules
- Creating and testing assignment rules

Describing the Siebel assignment methodology
Configure assignment objects in Siebel Tools
Invoke Assignment Manager in dynamic mode