

Siebel Application Administration 15.5

Duration: 5 Days

What you will learn

This Siebel Application Administration training is designed for application administrators who support initial and ongoing administration of Siebel applications. The initial section of the course provides grounding in key Siebel CRM concepts; expert Oracle University instructors will help you navigate the application, the Siebel CRM architecture, and the Siebel CRM object model.

Learn To:

Navigate a Siebel CRM application.

Use access control to limit user visibility to application views and records.

Enhance user productivity using tab layouts, view links, and predefined queries.

Administer initial data and lists of values.

Administer assessment templates, activity templates, and so forth.

Administer approvals, inboxes, and reports.

Benefits to You

By taking this course, you'll develop a deeper understanding of access control and how employees and application data must be administered. You'll explore literature, initial data, and administration that directly impacts the user experience: user preferences, lists of values, certain types of data, predefined queries, quick fill templates, message broadcasts, alerts, activity templates, assessment templates, and iHelp.

Automation, Workflows and Administration Topics

This course will also introduce you to business automation, including workflows, and then discusses administration topics that require them, such as approvals, the Universal Inbox, and Siebel Reports. The final section covers additional administration topics such as submitting jobs, state models, the audit trail, system preferences, and administering Assignment Manager.

Please Note

It is appropriate for Siebel 15.x and 8.x customers. Practices are performed using Open UI.

Audience

Administrator

End Users

Course Topics

Introduction to Siebel CRM

Navigating Siebel CRM Applications

Working with Data in Siebel CRM Applications

EZY Intellect Pte. Ltd.,

#1 Changi North Street 1, Singapore – 498789. www.ezyintellect.com

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Exploring the Siebel Architecture
Understanding Object Definitions

Access Control of Records and Views

Security and Access Control
Responsibilities and Views
Users, Positions, and Organizations
Controlling Access to Customer Data
Catalogs and Master Data

Administering Literature

Customizing the User Experience

Modifying Tab Layouts
Administering View Links
Customizing Home Pages
Resetting a User's Preferences

Administering Lists of Values

Administering Lists of Values
Administering Phone Formats
Administering Hierarchical Lists of Values

Administering Initial Data

Countries, Currencies, Languages, and Locales
Periods
Time Zones
Households
Expense Types and Payment Terms
ZIP Codes
Industries
"Contact Us" Information

Quick Fill Templates and Predefined Queries

Administering Quick Fill Templates
Administering Predefined Queries
Understanding the Default Predefined Query

Administering Message Broadcasts and Alerts

Administering Message Broadcasts
Administering Alerts

Administering Activity Plans and Templates
Defining Activities, Activity Plans, and Activity Templates
Administering Activity Templates
Administering Sales Methods

Administering Assessment Templates

Administering Siebel iHelp

Comparing Siebel iHelp, Task UI, and SmartScripts
Creating iHelp Items

Administering Business Automation

Defining Business Services, Business Service Methods, and Arguments
Activating Workflows
Administering Inbound Web Services

Administering Approvals

Administering the Universal Inbox

Administering Siebel Reports

Submitting Jobs

Submitting Jobs
Creating Job Templates

Creating State Models

Administering Audit Trail

Setting System Preferences

Default MVG Exists Query
Auto Mgr Calendar Access
Forecast: Auto-Forecast
Default Time Zone
Universal Time Coordinated
Strict Date Format

Administering Assignment Manager