Siebel 8 Consultant – Exam Study Guide

The **Siebel 8 Consultant Exam Study Guide** is designed to highlight the training options mapped to each exam topic to guide students in their preparation to pass the **Siebel 8 Consultant Exam (1Z0-202)**.

The exam objectives are defined by learner or practitioner level of knowledge.

*Learner-level*: questions require the candidate to recall information to derive the correct answer

*Practitioner-level*: questions require the candidate to derive the correct answer from an application of their knowledge

For each exam topic there have been identified alternative training options that are available at Oracle. Please note that some of the training recommended can cover multiple exam topics.

**The exam covers 48 topics:**

**Topic 1: Introducing Siebel Applications**

**Objectives**

| Describe Siebel Customer Relationship Management (CRM) applications and how they are classified | Learner |
| Identify the common business entities found in Siebel CRM applications | Learner |

**Training Options**

- Instructor Led Training (delivered by Oracle University)
  - Siebel 8.1 Core Consultant Course
  - Siebel 8.0 Essentials
- Online Training
  - Siebel 8.0 Technical Foundations
  - Siebel 8.1.x Application Administration RWC

**Topic 2: Using the Siebel Web Client**

**Objectives**

| Start and log in to a Siebel application | Learner |
| Navigate screens and views in the application | Learner |
| Identify major user interface (UI) features in a Siebel CRM application | Learner |

**Training Options**

- Instructor Led Training (delivered by Oracle University)
  - Siebel 8.1 Core Consultant Course
  - Siebel 8.0 Essentials
- Online Training
  - Siebel 8.0 Technical Foundations
Topic 3: Working With Siebel Data

Objectives
Create, modify, and delete records
Query for records in a Siebel CRM application

Level
Learner

Training Options
- Instructor Led Training (delivered by Oracle University)
  - Siebel 8.1 Core Consultant Course
  - Siebel 8.0 Essentials
- Online Training
  - Siebel 8.0 Technical Foundations
  - Siebel 8.1.x Application Administration RWC

Topic 4: Responsibilities and Views

Objectives
Describe the purpose of a responsibility
Create a new responsibility
Modify an existing responsibility

Level
Learner

Training Options
- Instructor Led Training (delivered by Oracle University)
  - Siebel 8.1 Core Consultant Course
  - Siebel 8.0 Essentials
- Online Training
  - Siebel 8.0 Technical Foundations
  - Siebel 8.1.x Application Administration RWC

Topic 5: Users, Positions, and Organizations

Objectives
Describe how data access is controlled by users, positions, and organizations
Implement the company structure using divisions, organizations, positions, users, and employees

Level
Practitioner

Training Options
- Instructor Led Training (delivered by Oracle University)
  - Siebel 8.1 Core Consultant Course
  - Siebel 8.0 Essentials
- Online Training
  - Siebel 8.0 Technical Foundations
Topic 6: Controlling Access to Customer Data

Objectives
- Describe the difference between customer and master data in Siebel applications
- Describe the different Access Control mechanisms used to restrict access to data in Siebel applications
- Identify the different view types used for different types of users

Level
- Practitioner

Training Options
- Instructor Led Training (delivered by Oracle University)
  - Siebel 8.1 Core Consultant Course
  - Siebel 8.0 Essentials
- Online Training
  - Siebel 8.0 Technical Foundations
  - Siebel 8.1.x Application Administration RWC

Topic 7: The Siebel Web Architecture

Objectives
- Identify the pieces that make up the Siebel Web architecture
- Identify the role of each piece of the architecture
- Describe how Siebel requests are processed

Level
- Learner
- Practitioner

Training Options
- Instructor Led Training (delivered by Oracle University)
  - Siebel 8.1 Core Consultant Course
  - Siebel 8.0 Essentials
- Online Training
  - Siebel 8.0 Technical Foundations
  - Siebel 8.1.x Application Administration RWC

Topic 8: Server Components and Parameters

Objectives
- Define component groups
- Define components
- Describe parameters as inputs for components
- Describe the various levels at which you can set parameters and how to set them
- Describe named subsystems and job templates

Level
- Learner
- Practitioner

Training Options
- Instructor Led Training (delivered by Oracle University)
Topic 9: Server Management

Objectives
Monitor the state of the enterprise, and individual servers and components within that enterprise
Perform routine administrative tasks on the enterprise, including: a. Managing components b. Backing up and restoring the enterprise c. Setting logging options d. Submitting jobs

Level
Learner
Practitioner

Training Options

- Instructor Led Training (delivered by Oracle University)
  - Siebel 8.1 Core Consultant Course
  - Siebel 8.0 Essentials
  - Siebel 8.1.x Installation and System Administration
- Online Training
  - Siebel 8.0 Technical Foundations
  - Siebel 8.1.x Application Administration RWC

Topic 10: Siebel Client Types

Objectives
Identify the various Siebel clients
Describe files associated with each client, including configuration files and local databases
Describe how each client accesses Siebel servers and data

Level
Learner
Practitioner
Practitioner

Training Options

- Instructor Led Training (delivered by Oracle University)
  - Siebel 8.1 Core Consultant Course
  - Siebel 8.0 Essentials
  - Siebel 8.1.x Installation and System Administration
- Online Training
  - Siebel 8.0 Technical Foundations
  - Siebel 8.1.x Application Administration RWC

Topic 11: Securing Access to the Application

Objectives
Describe the types of user authentication supported by Siebel applications
Explain the role of the security adapter

Level
Learner
Practitioner
Describe Single Sign On (SSO) security and how it differs from other authentication methods

Practitioner

Training Options

- Instructor Led Training (delivered by Oracle University)
  - Siebel 8.1 Core Consultant Course
  - Siebel 8.0 Essentials
- Online Training
  - Siebel 8.0 Technical Foundations
  - Siebel 8.1.x Application Administration RWC

Topic 12: Installing Siebel Applications

Objectives

- Describe pre-installation steps necessary to prepare your environment for a Siebel installation
- Install the Siebel application
- Perform post-installation steps to verify your Siebel environment
- Describe how to use the multi-server update tool to automate installations

Level

Practitioner

Training Options

- Instructor Led Training (delivered by Oracle University)
  - Siebel 8.1 Core Consultant Course
  - Siebel 8.0 Essentials
  - Siebel 8.1.x Installation and System Administration
- Online Training
  - Siebel 8.0 Technical Foundations
  - Siebel 8.1.x Application Administration RWC

Topic 13: Siebel Application Architecture

Objectives

- Describe the major types of object definitions
- Describe the relationships between them

Level

Learner

Training Options

- Instructor Led Training (delivered by Oracle University)
  - Siebel 8.1 Core Consultant Course
  - Siebel 8.0 Essentials
- Online Training
  - Siebel 8.0 Technical Foundations
  - Siebel 8.1.x Application Administration RWC
**Topic 14: Using Siebel Tools to Examine Object Definitions**

**Objectives**
- Describe the differences between object types and object definitions
- Use Siebel Tools to examine parent and child object definitions

<table>
<thead>
<tr>
<th>Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Learner</td>
</tr>
</tbody>
</table>

**Training Options**
- Instructor Led Training (delivered by Oracle University)
  - Siebel 8.1 Core Consultant Course
  - Siebel 8.0 Essentials
- Online Training
  - Siebel 8.0 Technical Foundations
  - Siebel 8.1.x Application Administration RWC

**Topic 15: The Siebel Data Model**

**Objectives**
- Describe the purpose of the Siebel Data Model
- Describe the role of primary and foreign keys, indexes, and user keys
- Identify prominent tables in the Siebel Data Model

<table>
<thead>
<tr>
<th>Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Learner</td>
</tr>
<tr>
<td>Practitioner</td>
</tr>
</tbody>
</table>

**Training Options**
- Instructor Led Training (delivered by Oracle University)
  - Siebel 8.1 Core Consultant Course
  - Siebel 8.0 Essentials
- Online Training
  - Siebel 8.0 Technical Foundations
  - Siebel 8.1.x Application Administration RWC

**Topic 16: Siebel Business Components**

**Objectives**
- Define a business component
- Describe how business component fields at the business object layer are mapped to columns at the data layer
- Describe how base and joined tables are used as a part of this mapping

<table>
<thead>
<tr>
<th>Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Learner</td>
</tr>
<tr>
<td>Practitioner</td>
</tr>
</tbody>
</table>

**Training Options**
- Instructor Led Training (delivered by Oracle University)
  - Siebel 8.1 Core Consultant Course
  - Siebel 8.0 Essentials
  - Siebel 8.1.x Tools
- Online Training
  - Siebel 8.0 Technical Foundations
  - Siebel 8.1.x Application Administration RWC
**Topic 17: Siebel Business Objects**

**Objectives**
- Describe how business objects focus data presented in the UI based on context
- Describe how views reference business objects
- Describe how links are used to relate parent business components to child business components

**Level**
- Learner

**Training Options**
- Instructor Led Training (delivered by Oracle University)
  - Siebel 8.1 Core Consultant Course
  - Siebel 8.0 Essentials
  - Siebel 8.1.x Tools
- Online Training
  - Siebel 8.0 Technical Foundations
  - Siebel 8.1.x Application Administration RWC

**Topic 18: Configuration Strategy**

**Objectives**
- List the critical elements of the Siebel configuration strategy

**Level**
- Learner

**Training Options**
- Instructor Led Training (delivered by Oracle University)
  - Siebel 8.1 Core Consultant Course
  - Siebel 8.0 Essentials
  - Siebel 8.1.x Tools
- Online Training
  - Siebel 8.0 Technical Foundations
  - Siebel 8.1.x Application Administration RWC

**Topic 19: The Configuration Process**

**Objectives**
- Describe the development environment architecture
- Set up the development environment

**Level**
- Practitioner

**Training Options**
- Instructor Led Training (delivered by Oracle University)
  - Siebel 8.1 Core Consultant Course
  - Siebel 8.0 Essentials
  - Siebel 8.1.x Tools
- Online Training
  - Siebel 8.0 Technical Foundations
  - Siebel 8.1.x Application Administration RWC
### Topic 20: Managing Object Definitions

**Objectives**
- Explain the role of projects  
- Manage object definitions using Check Out and Check In  
- Lock projects locally

**Level**  
Learner

**Training Options**

- Instructor Led Training (delivered by Oracle University)
  - Siebel 8.1 Core Consultant Course
  - Siebel 8.0 Essentials
  - Siebel 8.1.x Tools
- Online Training
  - Siebel 8.0 Technical Foundations
  - Siebel 8.1.x Application Administration RWC

### Topic 21: Editing and Compiling Object Definitions

**Objectives**
- Create new and edit existing object definitions  
- Validate edited object definitions  
- Archive object definitions and projects  
- Back up the local database  
- Compile object definitions into a repository file

**Level**  
Learner

**Training Options**

- Instructor Led Training (delivered by Oracle University)
  - Siebel 8.1 Core Consultant Course
  - Siebel 8.0 Essentials
  - Siebel 8.1.x Tools
- Online Training
  - Siebel 8.0 Technical Foundations
  - Siebel 8.1.x Application Administration RWC

### Topic 22: UI Layer Configuration: Web Templates

**Objectives**
- Describe the role of Siebel Web template files  
- Describe the role of Siebel tags in template files  
- List the types of templates  
- Describe how to register, associate, and bind a template file

**Level**  
Practitioner

**Training Options**

- Instructor Led Training (delivered by Oracle University)
  - Siebel 8.1 Core Consultant Course
Topic 23: UI Layer Configuration: Applets

Objectives
- Create and modify a list applet
- Create and modify a form applet

Level
- Practitioner

Training Options
- Instructor Led Training (delivered by Oracle University)
  - Siebel 8.1 Core Consultant Course
  - Siebel 8.0 Essentials
  - Siebel 8.1.x Tools
- Online Training
  - Siebel 8.0 Technical Foundations
  - Siebel 8.1.x Application Administration RWC

Topic 24: UI Layer Configuration: Applications, Screens, and Views

Objectives
- Tailor applications
- Configure how a view is accessed on a screen
- Change the order of screen views for a screen
- Create and administer a view
- Associate a view with a template

Level
- Practitioner

Training Options
- Instructor Led Training (delivered by Oracle University)
  - Siebel 8.1 Core Consultant Course
  - Siebel 8.0 Essentials
  - Siebel 8.1.x Tools
- Online Training
  - Siebel 8.0 Technical Foundations
  - Siebel 8.1.x Application Administration RWC

Topic 25: UI Layer Configuration: Drilldowns

Objectives
- Configure drilldown to a related view
- Enable the thread bar

Level
- Practitioner

Training Options
Topic 26: Business Layer Configuration: Joins

Objectives
Create a join that brings data from a standard table into a standard business component
Create a join that brings data from a party table into a standard business component
Create a join that brings data from a party table into another party business component

Training Options

○ Instructor Led Training (delivered by Oracle University)
  ▪ Siebel 8.1 Core Consultant Course
  ▪ Siebel 8.0 Essentials
  ▪ Siebel 8.1.x Tools

○ Online Training
  ▪ Siebel 8.0 Technical Foundations
  ▪ Siebel 8.1.x Application Administration RWC

Topic 27: Business Layer Configuration: Existing Business Components and Fields

Objectives
Edit business component properties to capture business logic
Describe business component view modes
Edit field properties to capture business logic
Specify business component and field user properties

Training Options

○ Instructor Led Training (delivered by Oracle University)
  ▪ Siebel 8.1 Core Consultant Course
  ▪ Siebel 8.0 Essentials
  ▪ Siebel 8.1.x Tools

○ Online Training
  ▪ Siebel 8.0 Technical Foundations
  ▪ Siebel 8.1.x Application Administration RWC

**Objectives**
- Create a new business component (BC)
- Add a business component to a business object

**Level**
- Practitioner

**Training Options**
- Instructor Led Training (delivered by Oracle University)
  - Siebel 8.1 Core Consultant Course
  - Siebel 8.0 Essentials
  - Siebel 8.1.x Tools
- Online Training
  - Siebel 8.0 Technical Foundations
  - Siebel 8.1.x Application Administration RWC

**Topic 29: Business Layer Configuration: Picklists**

**Objectives**
- Describe the differences between dynamic and static picklists
- Administer a list of values
- Configure static or dynamic picklists

**Level**
- Learner

**Training Options**
- Instructor Led Training (delivered by Oracle University)
  - Siebel 8.1 Core Consultant Course
  - Siebel 8.0 Essentials
  - Siebel 8.1.x Tools
- Online Training
  - Siebel 8.0 Technical Foundations
  - Siebel 8.1.x Application Administration RWC

**Topic 30: Configuring Multi-Value Groups**

**Objectives**
- Describe multi-value groups and their benefits
- Use Siebel Tools to configure a multi-value group

**Level**
- Learner

**Training Options**
- Instructor Led Training (delivered by Oracle University)
  - Siebel 8.1 Core Consultant Course
  - Siebel 8.0 Essentials
  - Siebel 8.1.x Tools
- Online Training
  - Siebel 8.0 Technical Foundations
  - Siebel 8.1.x Application Administration RWC
**Topic 31: Data Layer Configuration**

**Objectives**
- Create extension columns in a table
- Create custom tables: standalone table, 1:1 extension table, 1:M extension table

**Level**
- Practitioner

**Training Options**
- Instructor Led Training (delivered by Oracle University)
  - Siebel 8.1 Core Consultant Course
  - Siebel 8.0 Essentials
  - Siebel 8.1.x Tools
- Online Training
  - Siebel 8.0 Technical Foundations
  - Siebel 8.1.x Application Administration RWC

**Topic 32: Siebel Business Services**

**Objectives**
- Describe a business service
- Describe the structure and role of property sets
- Use the business service simulator to test a business service

**Level**
- Learner
- Practitioner

**Training Options**
- Instructor Led Training (delivered by Oracle University)
  - Siebel 8.1 Core Consultant Course
  - Siebel 8.0 Essentials
  - Siebel 8.1.x Business Automation
- Online Training
  - Siebel 8.0 Technical Foundations
  - Siebel 8.1.x Application Administration RWC

**Topic 33: Building Siebel Workflow Processes**

**Objectives**
- List the types of workflow processes and workflow steps
- Create a new workflow process and configure business service, Siebel operation, and decision steps

**Level**
- Learner
- Practitioner

**Training Options**
- Instructor Led Training (delivered by Oracle University)
  - Siebel 8.1 Core Consultant Course
  - Siebel 8.0 Essentials
  - Siebel 8.1.x Business Automation
- Online Training
Topic 34: Testing and Deploying Workflow Processes

Objectives
- Test a Siebel workflow process using the simulator
- Deploy a Siebel workflow process

Training Options
- Instructor Led Training (delivered by Oracle University)
  - Siebel 8.1 Core Consultant Course
  - Siebel 8.0 Essentials
  - Siebel 8.1.x Business Automation
- Online Training
  - Siebel 8.0 Technical Foundations
  - Siebel 8.1.x Application Administration RWC

Topic 35: Executing Workflow Processes

Objectives
- Describe the workflow execution architecture
- List several ways to invoke workflow
- Invoke a workflow process using a run-time event
- Invoke a workflow process using a custom control

Training Options
- Instructor Led Training (delivered by Oracle University)
  - Siebel 8.1 Core Consultant Course
  - Siebel 8.0 Essentials
  - Siebel 8.1.x Business Automation
- Online Training
  - Siebel 8.0 Technical Foundations
  - Siebel 8.1.x Application Administration RWC

Topic 36: Using Workflow Policies

Objectives
- Create a workflow policy that invokes a workflow process in the Workflow Process Manager server component
- Enable the workflow policy using workflow server components

Training Options
- Instructor Led Training (delivered by Oracle University)
  - Siebel 8.1 Core Consultant Course
Topic 37: Siebel Task UI

Objectives
Describe the role and benefits of Siebel Task UI
Invoke and complete a task

Training Options
- Instructor Led Training (delivered by Oracle University)
  - Siebel 8.1 Core Consultant Course
  - Siebel 8.0 Essentials
  - Siebel 8.1.x Business Automation
- Online Training
  - Siebel 8.0 Technical Foundations
  - Siebel 8.1.x Application Administration RWC

Topic 38: Task UI: Creating a Task

Objectives
Identify the major components of a task
Configure a task
Administer a task

Training Options
- Instructor Led Training (delivered by Oracle University)
  - Siebel 8.1 Core Consultant Course
  - Siebel 8.0 Essentials
  - Siebel 8.1.x Business Automation
- Online Training
  - Siebel 8.0 Technical Foundations
  - Siebel 8.1.x Application Administration RWC

Topic 39: Transient Business Components and Branching

Objectives
Describe the role of transient business components and task applets
Configure branching logic in a task

Training Options
- Instructor Led Training (delivered by Oracle University)
Topic 40: Introducing Siebel Assignment Manager

Objectives
- Explain the role of Siebel Assignment Manager  
- List the elements used to create rules that assign business data

Level: Learner

Training Options
- Instructor Led Training (delivered by Oracle University)
  - Siebel 8.1 Core Consultant Course
  - Siebel 8.0 Essentials
  - Siebel 8.1.x Business Automation
- Online Training
  - Siebel 8.0 Technical Foundations
  - Siebel 8.1.x Application Administration RWC

Topic 41: Creating Assignment Rules

Objectives
- Create an assignment rule that assigns sales data to a sales team
- Create an assignment rule that assigns service data to a skilled employee
- Test assignment rules

Level: Practitioner

Training Options
- Instructor Led Training (delivered by Oracle University)
  - Siebel 8.1 Core Consultant Course
  - Siebel 8.0 Essentials
  - Siebel 8.1.x Business Automation
- Online Training
  - Siebel 8.0 Technical Foundations
  - Siebel 8.1.x Application Administration RWC

Topic 42: Tailoring Assignment Manager Behavior

Objectives
- Describe the steps in the assignment methodology
- Prioritize rules using exclusive rules and rule group sequencing
- Modify the behavior of an assignment object

Level: Practitioner
Training Options

- Instructor Led Training (delivered by Oracle University)
  - Siebel 8.1 Core Consultant Course
  - Siebel 8.0 Essentials
  - Siebel 8.1.x Business Automation
- Online Training
  - Siebel 8.0 Technical Foundations
  - Siebel 8.1.x Application Administration RWC

Topic 43: Invoking Siebel Assignment Manager

Objectives
Level
List the modes in which Assignment Manager can be invoked Learner
Invoke Assignment Manager in dynamic mode Practitioner

Training Options

- Instructor Led Training (delivered by Oracle University)
  - Siebel 8.1 Core Consultant Course
  - Siebel 8.0 Essentials
  - Siebel 8.1.x Business Automation
- Online Training
  - Siebel 8.0 Technical Foundations
  - Siebel 8.1.x Application Administration RWC

Topic 44: State Models

Objectives
Level
Describe how state models can enforce business logic Learner
Create a new state model Learner

Training Options

- Instructor Led Training (delivered by Oracle University)
  - Siebel 8.1 Core Consultant Course
  - Siebel 8.0 Essentials
  - Siebel 8.1.x Business Automation
- Online Training
  - Siebel 8.0 Technical Foundations
  - Siebel 8.1.x Application Administration RWC

Topic 45: Introducing Enterprise Integration Manager

Objectives
Level
Describe the features of Enterprise Integration Manager (EIM) Learner
Training Options

- Instructor Led Training (delivered by Oracle University)
  - Siebel 8.1 Core Consultant Course
  - Siebel 8.0 Essentials
  - Siebel 8.1.x Installation and System Administration
- Online Training
  - Siebel 8.0 Technical Foundations
  - Siebel 8.1.x Application Administration RWC

Topic 46: Introducing Application Deployment Manager

Objectives
- Describe the Application Deployment Manager (ADM) architecture
- Describe how deployment options are configured

Level
- Learner
- Practitioner

Training Options

- Instructor Led Training (delivered by Oracle University)
  - Siebel 8.1 Core Consultant Course
  - Siebel 8.0 Essentials
  - Siebel 8.1.x Installation and System Administration
- Online Training
  - Siebel 8.0 Technical Foundations
  - Siebel 8.1.x Application Administration RWC

Topic 47: Deploying Application Customizations

Objectives
- Use the packager utility to bundle application customizations
- Deploy a package using the ADM command-line interface

Level
- Practitioner

Training Options

- Instructor Led Training (delivered by Oracle University)
  - Siebel 8.1 Core Consultant Course
  - Siebel 8.0 Essentials
  - Siebel 8.1.x Installation and System Administration
- Online Training
  - Siebel 8.0 Technical Foundations
  - Siebel 8.1.x Application Administration RWC

Topic 48: Siebel Party Business Components

Objectives
- Define a party business component
- Describe the role of S_PARTY and its extension tables in storing party business component data

Level
- Learner
- Practitioner
Describe how data is stored differently for non-party business components and party business components

Describe how implicit and explicit joins are used with party business components

Training Options

- Instructor Led Training (delivered by Oracle University)
  - Siebel 8.1 Core Consultant Course
  - Siebel 8.0 Essentials
  - Siebel 8.1.x Tools
- Online Training
  - Siebel 8.0 Technical Foundations
  - Siebel 8.1.x Application Administration RWC

Oracle is committed to developing practices and products that help protect the environment

Copyright © 2009, Oracle and/or its affiliates. All rights reserved.

This document is provided for information purposes only and the contents hereof are subject to change without notice. This document is not warranted to be error-free, nor subject to any other warranties or conditions, whether expressed orally or implied in law, including implied warranties and conditions of merchantability or fitness for a particular purpose. We specifically disclaim any liability with respect to this document and no contractual obligations are formed either directly or indirectly by this document. This document may not be reproduced or transmitted in any form or by any means, electronic or mechanical, for any purpose, without our prior written permission.

Oracle is a registered trademark of Oracle Corporation and/or its affiliates. Other names may be trademarks of their respective owners. 0109