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## Siebel CRM Workshop (Version 19.x/20.x)

### Course Description

The Siebel CRM Workshop (Version 19.x/20.x) is a comprehensive, modular training that focuses on features and infrastructure differences introduced in Siebel CRM Innovation Pack 17 and subsequent updates.

The workshop can be tailored to meet the exact needs of the target audience, not only in terms of modules but also in availability of hands-on training and Q&A sessions with the instructor.

The workshop is constantly updated, following Oracle's Continuous Release Model. The workshop is also applicable to any prior version (Siebel CRM Innovation Pack 17 or higher, including Siebel 18, 19 and 20).

### Target Audience and Prerequisites

The workshop is beneficial for the following groups, provided they have prior experience (Siebel Consultant or Business Analyst level) with Siebel CRM up to version 16:

- Siebel Developer
- Siebel Administrator
- Siebel Business Analyst


### Delivery and Scheduling

The workshop can be delivered in the following formats:

- Live Online (via web-conferencing tool)
- Recorded Class (presentations, demonstrations and labs)
- On-site

For Live Online delivery, session length can be varied to the customer's needs. Ideal session length for Live Online delivery is 2-4 hours.

## Modules

The following describes the available modules in the Siebel CRM Workshop (Version 19.x/20.x)  
The target audience is described with letters (A=Administrator, B=Business Analyst, D=Developer)  
Availability of a real-life demo or hands-on lab environment is indicated by the monitor icon (  )

### Siebel 2020 Overview

Overview of new features introduced since Siebel 17.0. Explanation of architectural differences between IP 17 and prior versions.



### Architecture, Installation, Configuration

Detailed discussion of the architectural novelties in IP 17 and higher, such as introduction of tomcat application containers, Apache ZooKeeper and deprecation of SRF and SWT files.

The module also provides information on installation of Siebel CRM IP 17 or higher and discusses the new Siebel Management Console for configuring and managing Siebel Enterprise Servers.



### Gateway Cluster

Deep-dive information on the clustering feature for Siebel Gateway Registry (Apache ZooKeeper)



### Web Tools and Workspaces

The module provides Siebel developers with broad information to understand the implications of the new Siebel Web Tools application and how it relates to the traditional Siebel Tools.

After an introduction to Workspaces, the module includes a discussion of how to use Workspaces to manage parallel development.



### Migration Application

The module introduces the Siebel Migration Application, which is the new mechanism to deploy changes from Design Repository/Development environments to Runtime Repository/Test/Production environments.

The audience is provided with great technical details to understand all aspects and implications of the new Siebel Migration Application and how to apply it into the project.



## Test Automation

The module introduces the new built-in Test Automation framework. It discusses the necessary setup steps and provides a demonstration of recording, playing back and saving a test script.

In addition, the module discusses batch testing with Jenkins and the Oracle-provided plug-in.



## Approval Manager

An introduction to the new Siebel Approval Manager application which is used for process governance between issue tracking systems such as JIRA and version control systems such as Siebel Workspaces.

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## REST API

Deep-dive and very detailed discussion of the Siebel REST API. Discussion of the Data API, Workspace API and Service API as well as the outbound REST infrastructure.



## Siebel Enterprise Cache

Overview of the Siebel Enterprise Cache server (currently developer preview) and how it applies to Siebel Configurator and Oracle ACT (Advanced Constraint Technology).

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## DISA and SODD

Introduction to Desktop Integration Siebel Agent (DISA) and Siebel Outlook Drag and Drop (SODD). Also discusses extensibility (Java) for DISA.



## Usage Pattern Tracking

Introduction to Siebel Usage Pattern Tracking (UPT) with details on how to capture user and application events in the browser and on the Siebel server and how to analyse the data.



## CalDAV and CardDAV

Introduction and setup instructions for Siebel CalDAV and CardDAV for synchronization of calendar/activity and contact data between Siebel CRM and Personal Information Management (PIM) systems such as Google Calendar and other smartphone/desktop applications.



## Upgrade Overview

A comprehensive overview of the Siebel Upgrade Process. It helps students understand the implications and efforts to upgrade from a prior version (e.g. Siebel 8.0 or IP 14) to Siebel CRM 20.x

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## Siebel Mobile Applications

A discussion of the Siebel Mobile Applications family. These applications are provided by Oracle and are optimized for use on small touchscreen devices (e.g. Tablets). The module also discusses offline synchronization options for Siebel Mobile Applications.

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## Siebel Open UI Introduction

An introduction for technical and non-technical staff to the Siebel Open UI architecture. Siebel Open UI has replaced the ActiveX-driven High-Interactivity client and is based on open web standards (HTML, CSS, JS).

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## Siebel Portlets

The module discusses the Siebel Portal Framework and focuses on the ability to display Siebel CRM web content within external applications (aka Portlets).

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## Docker and Cloud

A brief discussion of current deployment options for Siebel CRM. The module provides insight for on-premises, hybrid and Cloud deployments and also includes a discussion of Docker as one option for containerization.

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