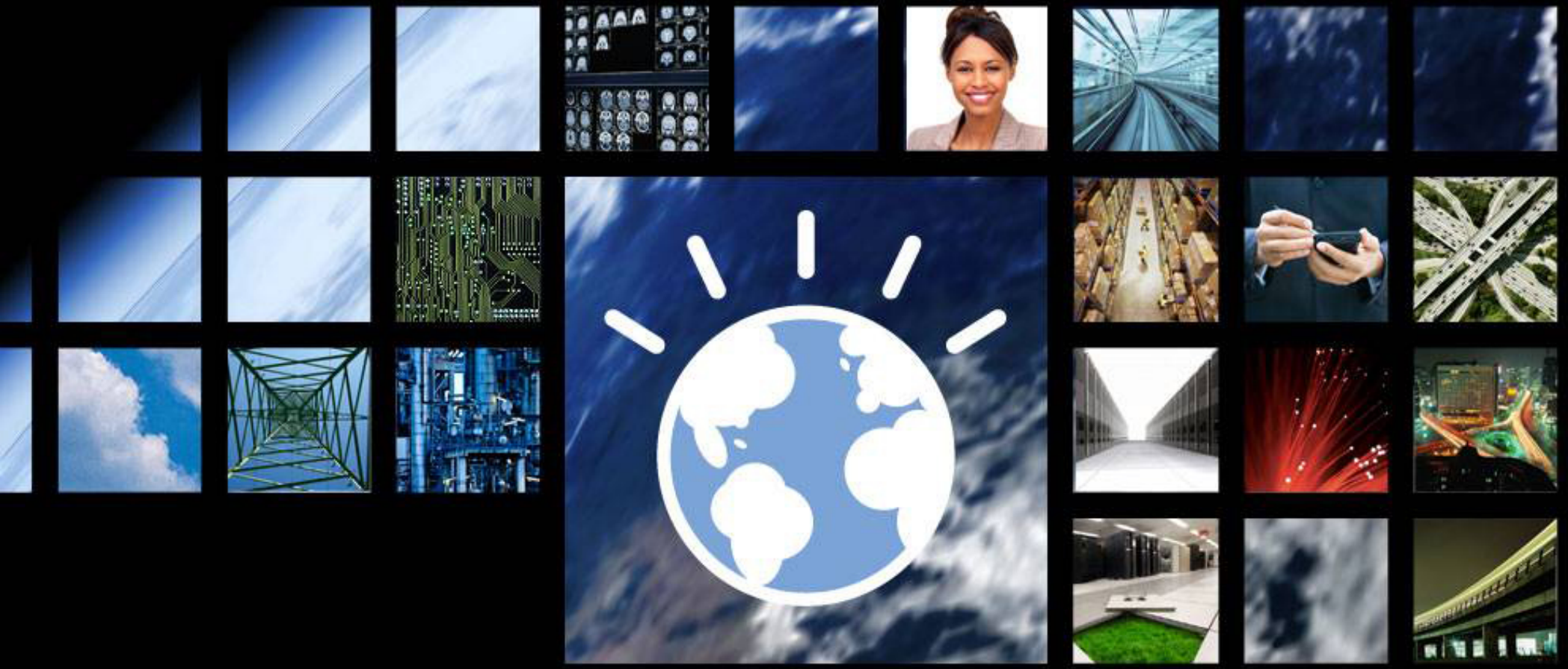
A smart conference for a smarter planet



Be Smart - 智慧的销售管理

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车轶， 邢常亮，王熙

2009 IMPACT
IBM SMART SOA 高峰论坛 6.10 • 北京

Lab时间安排

- **Lab介 绍 (25 min):**
  - ❖ 简要介绍该Lab的内容、目标、业务场景、系统构架及要展示的关键点。
- **客户实际操作 (50 min):**
  - ❖ 客户按照用户手册的步骤完成Lab业务场景的开发。
- **总结&讨论(15 min).**
  - ❖ 总结Lab的内容，回答客户的相关疑问。
- **NOTE:**

1) Lab中的销售管理系统以Siebel为例，其它应用系统如SAP 、OracleEBS同样适用。

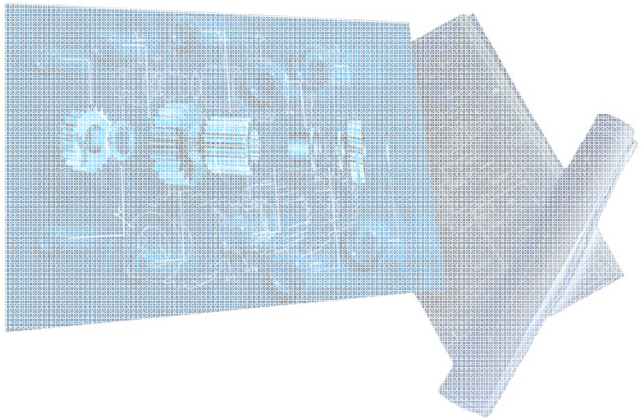
2) 财务系统和人力资源系统的集成不是本Lab的重点，故将用DB2 数据库进行模拟。

内容介绍

- Lab概　　述
- Lab场景介绍
- Lab产品介绍
- Lab总　　结

Lab 概　　述

- 主题
  - Be Smart - 智慧的销售管理
- 业务场景
  - 一个典型的基于SOA的应用系统集成解决方案，它以企业服务总线(ESB)为基础，完成了对销售管理、人力资源及财务系统的整合，实现了对整个销售行为的监控和管理。
  - 该方案可以帮助客户快速地实现对现有应用系统的集成；并具有良好的扩展性；另外，它可以让客户轻松实现对整个业务流程的实时监控和管理。
- 行业
  - 制造/保险/IT/软件/服务
- 产品
  - WebSphere Message Broker (WMB)- 企业服务总线
  - WebSphere (JCA) Adapter - 与应用系统的双向通信
  - WebSphere Business Monitor (WB Monitor)- 业务监控



Lab目标及关键点

- **Lab的目标**

  通过学习该Lab，用户可以

  - 了解IBM基于SOA的应用集成及业务监控的解决方案。
  - 了解IBM用于应用集成和业务监控的遵循SOA体系结构的相关产品及其主要功能。

- **Lab的关键点**

  - 展示如何使用高级企业服务总线WMB和相关连接技术实现对现有应用系统快速高效的连接整合。
  - 展示IBM基于企业服务总线的连接集成解决方案的灵活扩展性。
  - 展示WB Monitor对整体业务流程强大的实时监控管理和预警功能。

Lab业务背景

- **业务背景**

某公司存在若干应用系统：销售管理、财务及人力资源系统，各系统间彼此独立。

公司目前面临如下问题：

- 在每次销售过程中，销售人员需要访问多个应用系统; 系统间的数据同步需要手工完成。
- 整体系统架构的可扩展性较差。
- 无法对整个销售活动的状态变化进行实时的监控管理; 相关人员对潜在的风险无法得到及时的预警和通知。

- **客户需求**

整合现有系统资源及监控管理销售业务行为，加大管理力度，实现各部门间的高效合作，以达到销售业绩的最大化目标。

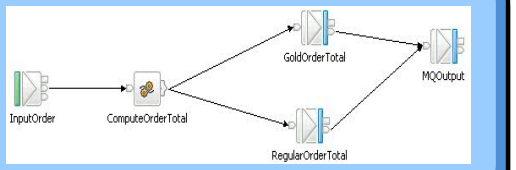
- 整合现有的若干应用系统。
- 优化现有的整体系统架构，提高系统的可扩展性。
- 实现对整个销售活动的实时监控和管理; 实现对潜在风险的及时预警和通知。

解决方案描述

人力资源系统

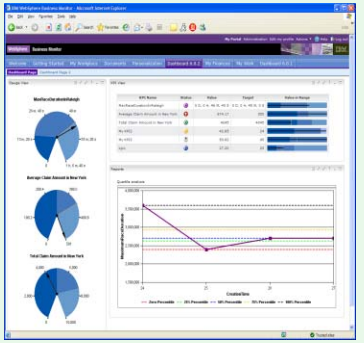
WebSphere Message Broker

WebSphere Adapter

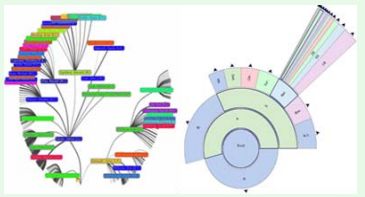


WB Monitor Model

WB Monitor Dashboard



Traditional View



Customized View

销售管理系统

SIEBEL

财务系统

发掘客户需求

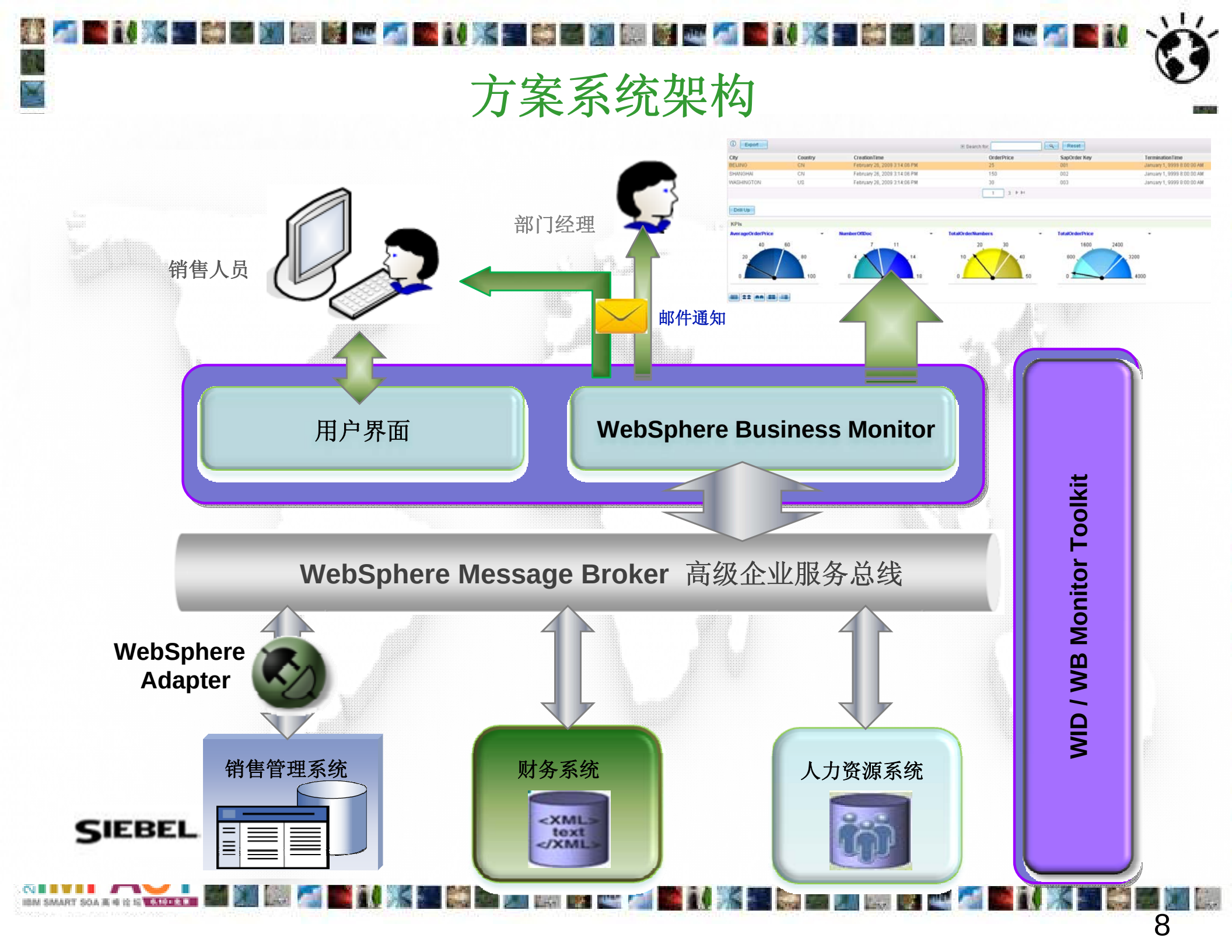
.....

.....

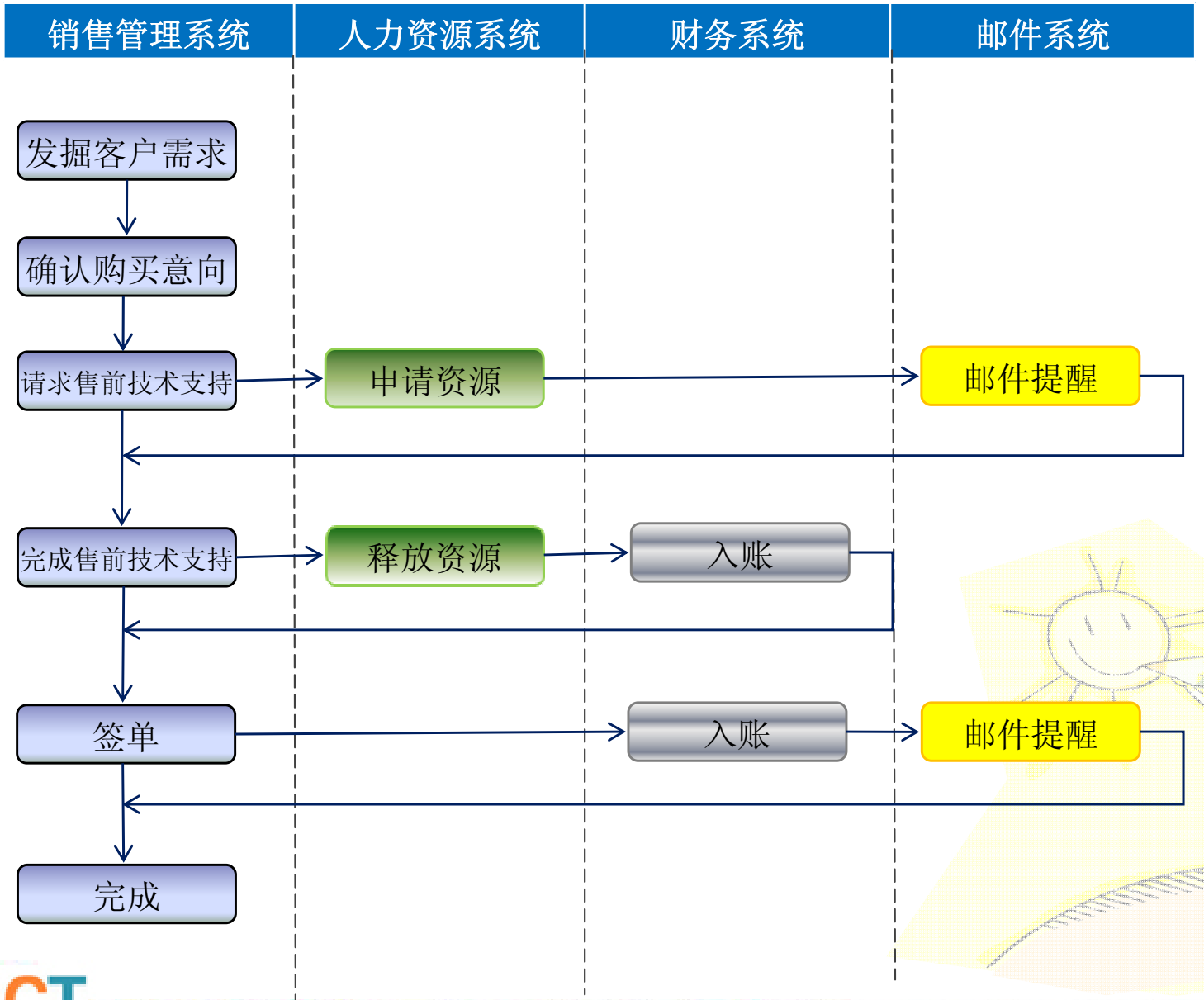
请求售前
技术支持

销售人员

方案系统架构


销售人员
部门经理
邮件通知
用户界面
WebSphere Business Monitor
WebSphere Message Broker 高级企业服务总线
WebSphere Adapter
销售管理系统
财务系统
人力资源系统
SIEBEL
WID / WB Monitor Toolkit

Lab场景描述


销售管理系统
人力资源系统
财务系统
邮件系统
发掘客户需求
确认购买意向
请求售前技术支持
申请资源
邮件提醒
完成售前技术支持
释放资源
入账
签单
入账
邮件提醒
完成

Lab场景描述 - 业务流程的监控及管理

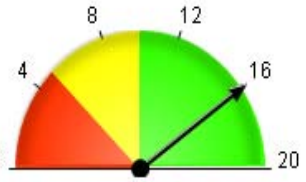
Export ... | Search for: | Reset

OpportunityID	CloseDate	CurrencyCode	FlowProcessingTime	Name	PositionCloseDate	SalesStage	TimeEnded	TimeEntry	TimeStarted	COMPLE
1-22BL	04/29/2009	USD	0 s	5001	04/29/2009	Data Entry		April 29, 2009 8:50:50 AM		
1-226T	04/28/2009	USD	9 h, 3 m, 4.547 s	40001	04/28/2009	Approved	April 29, 2009 9:00:17 AM	April 28, 2009 11:57:12 PM	April 28, 2009 11:57:12 PM	★
1-227F	04/28/2009	USD	5 d, 18 h, 13 m, 54 s	4002	04/28/2009	Submitted		April 28, 2009 11:57:24 PM	April 28, 2009 11:57:24 PM	
1-21SW	04/30/2009	USD	5 d, 18 h, 23 m, 28 s	20014New28	04/28/2009	Submitted		April 28, 2009 11:47:47	April 28, 2009 11:47:47	

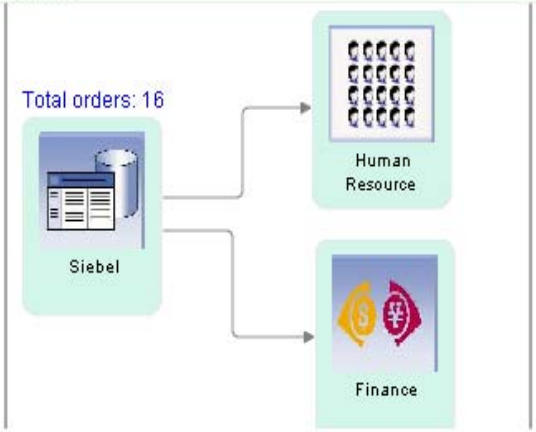
KPIs

ProcessAverageDuration

TotalOrders



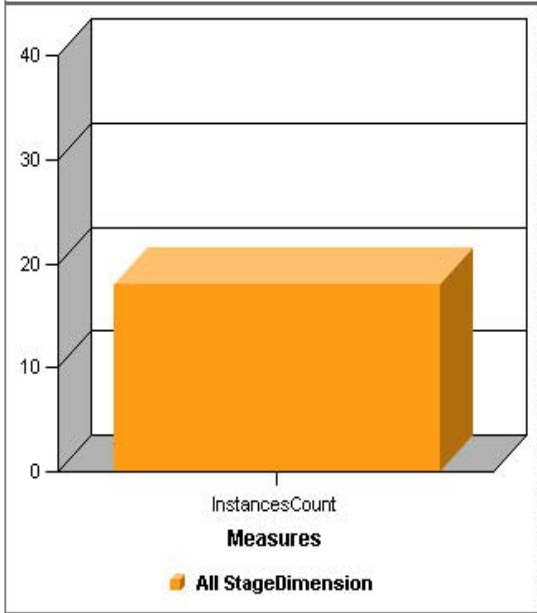
Diagrams



Dimensions

File Edit View Bookmarks Data Chart Tools Help

Drill Down



StageDimension	InstancesCount
All StageDimension	18

Lab操作步骤

- **场景1 – 销售管理系统(Siebel)和人力资源系统的集成**

  a) 用户在WMBT中连接相应的组件，并将连接好的消息工作流部署到服务器上运 行，实现销售管理系统到人力资源系统的数据同步和数据格式的转换。

  b) 用户在销售管理系统（Siebel 客户端 ）中修改机会状态，在人力资源系统中查看数据的同步情况，并查看Monitor的监控数据。

- **场景2 – 销售管理系统(Siebel),人力资源系统和财务系统的集成**

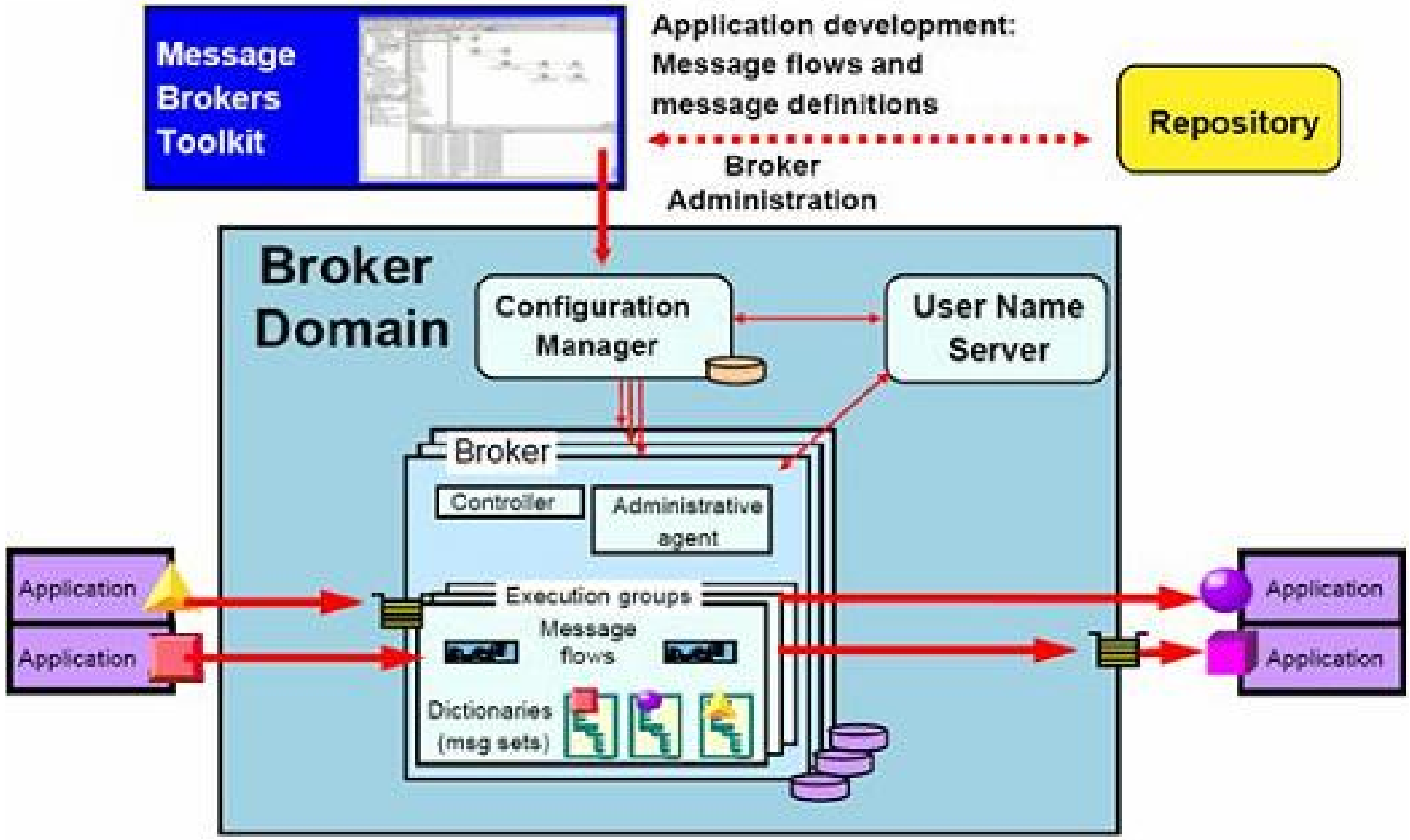
  a) 在场景1的基础上增加对财务系统的集成 。用户在WMBT中连接相应的组件，并将连接好的消息工作流部署到服务器 上运 行，实现销售管理系统到人力资源系统和财务系统的数据同步和数据格式的转换。

  b) 用户在销售管理系统（Siebel客户端 ）中修改机会状态，在人力资源系统和财务系统中查看数据的同步情况，并查看Monitor的监控数据。

Lab 产品介绍 – WMB

- **WebSphere Message Broker - 高级企业服务总线**

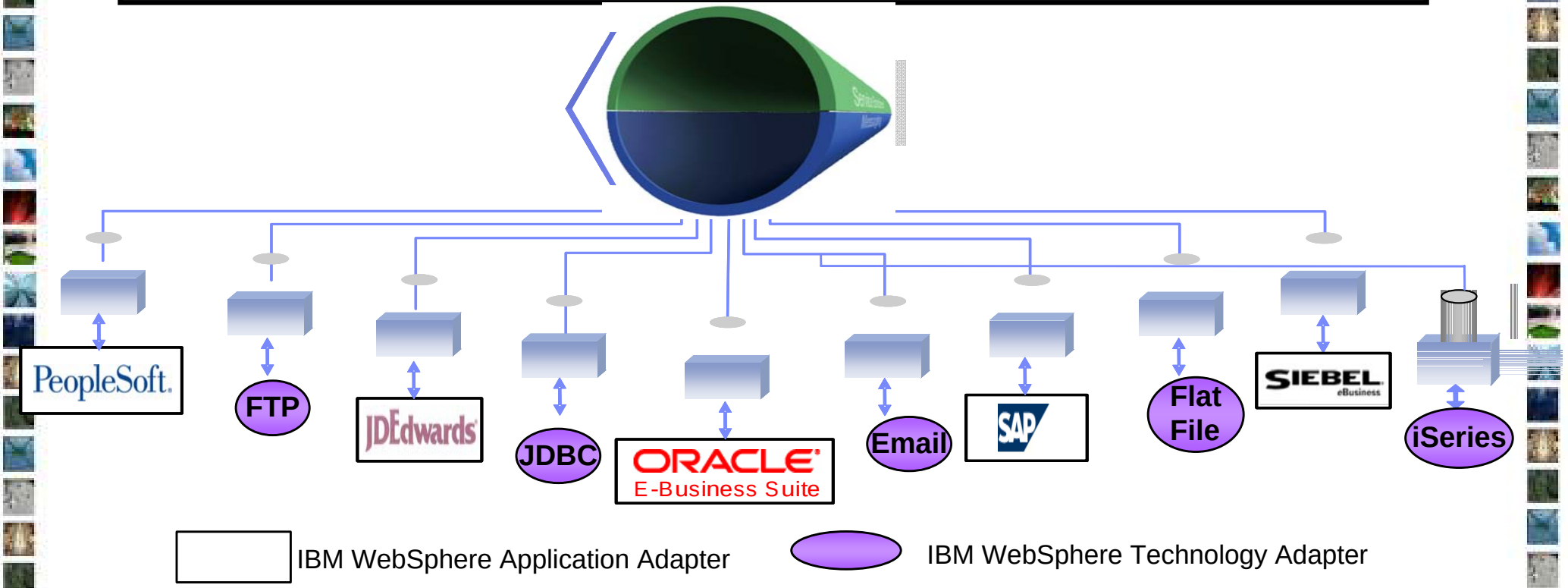
WMB 组件



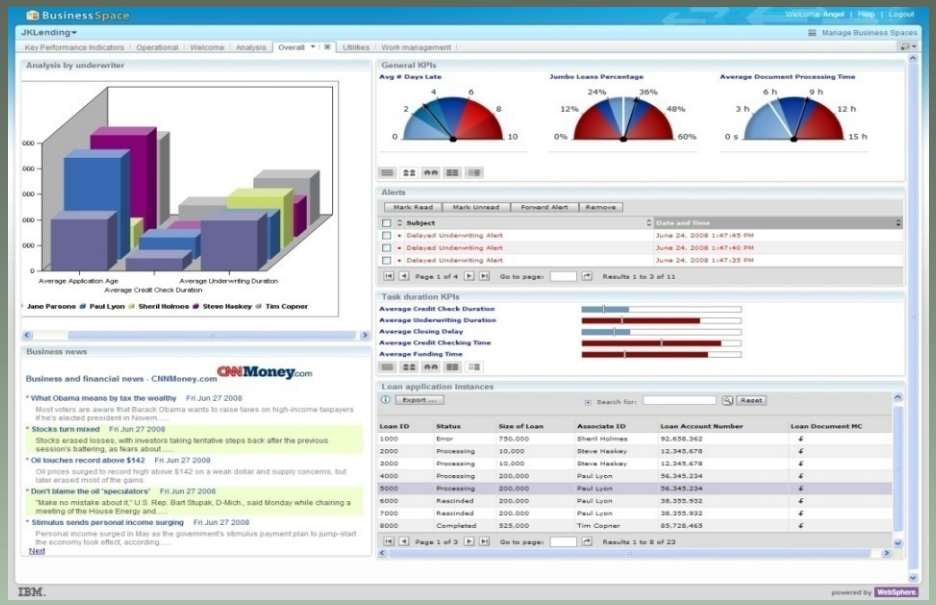
Lab 产品介绍 – WebSphere Adapters

- 什么是**WebSphere Adapters ?**

  - 一系列用来整合外部系统的组件级产品
    - 来自于IBM与IBM的合作伙伴
  - 能直接运行在IBM的主流整合应用服务器上面
    - 同时有相应的工具的支持



Lab 产品介绍 - WebSphere Business Monitor



- WB Monitor可以对不同业务系统进行
  - 实时监测
  - 历史数据的统计分析
  - KPI的计算和预测
  - 特定情况的预警

- 业务人员从而可以
  - 洞察业务运行状况，并及时处理发现的问题。
  - 根据业务KPI优化现有流程，合理分配资源。

Lab总　　结

- 我们今天的Lab中，主要涵盖了如下内容：
  - ❖ 介绍了IBM基于SOA的应用集成及业务流程监控的解决方案。
  - ❖ 介绍了IBM用于应用集成和业务监控的遵循SOA体系结构的相关产品及其主要功能。
- 通过学习该Lab，用户应该了解到：
  - ❖ 如何使用高级企业服务总线WMB和相关连接技术实现对现有应用系统快速高效的连接整合。
  - ❖ 展示IBM基于企业服务总线的连接集成解决方案的灵活扩展性。
  - ❖ 展示WB Monitor对整体业务流程强大的实时监控管理和预警功能。

讨　　论

Questions ?

参考资料

- WebSphere Message Broker 信息中心
  - http://publib.boulder.ibm.com/infocenter/wmbhelp/v6r1m0/index.jsp
- WebSphere Adapter 信息中心
  - http://www-01.ibm.com/software/integration/wbiadapters/library/infocenter/
  - http://publib.boulder.ibm.com/infocenter/ieduasst/v1r1m0/index.jsp?topic=/com.ibm.iea.wpi_v6/wa/6.1/Siebel.html
- WebSphere Business Monitor 信息中心
  - http://www-01.ibm.com/software/integration/wbimonitor/
  - http://publib.boulder.ibm.com/infocenter/dmndhelp/v6r2mx/index.jsp

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You

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