



IBM Software Group

## **WebSphere® Commerce V6.0 Feature Pack 4**

### ***Workspace support in Management Center***



@business on demand.

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This presentation covers the Tasks tool added to Management Center in WebSphere Commerce V6 Feature Pack 4. This tool provides workspace support for the existing Management Center tools.

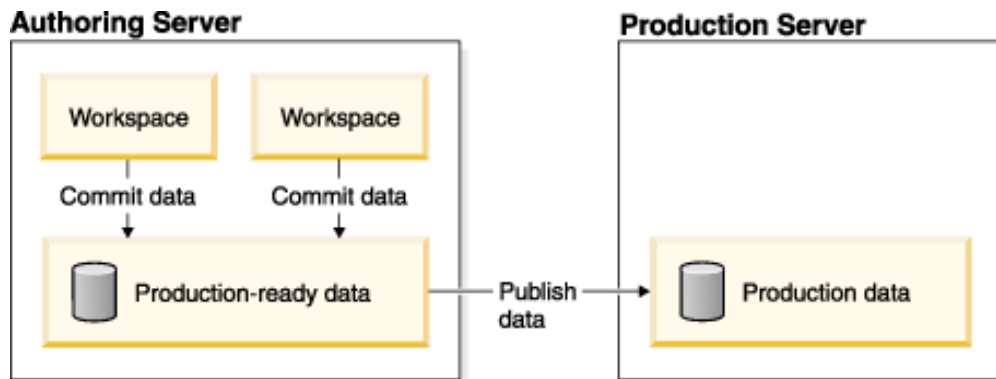
## Agenda

- Workspaces review
- Workspace support for contributors
- Workspace support for approvers
- Change control
- Troubleshooting



This presentation will begin by reviewing the workspaces concept. The new tasks tool will then be discussed from both a workspace contributor and approver perspective. The presentation will conclude with some updates to change control and troubleshooting tips.

## Workspaces review



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Workspace support in Management Center

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Introduced in WebSphere Commerce version 6, workspaces provide the ability for business users to contribute content associated to a business process that is isolated from the production-ready data on an authoring server. A workspace is created and managed by an administrative business user designated as the workspace manager. Not all tables can be updated through workspaces. For example, transaction-based tables, such as for storing customer orders are not managed with workspaces. By default, catalog, marketing and promotions tables can be managed in a workspace.

A workspace is an isolated access-controlled work area in which you can make and preview changes to managed assets without affecting managed assets and users outside the area. Working in the context of a workspace is similar to having your own private copy of the managed assets. It is possible to have multiple workspaces active on the same server at the same time.

Changes in workspaces are made to the production-ready data on an authoring server. Production-ready data is data that is ready to be published to the production server. Once changes made in a workspace are complete and approved they become part of the production-ready data. Only production-ready data on the authoring server is published to the production server from the authoring server. Data in workspaces is never published directly to the production server.

## Workspace tools

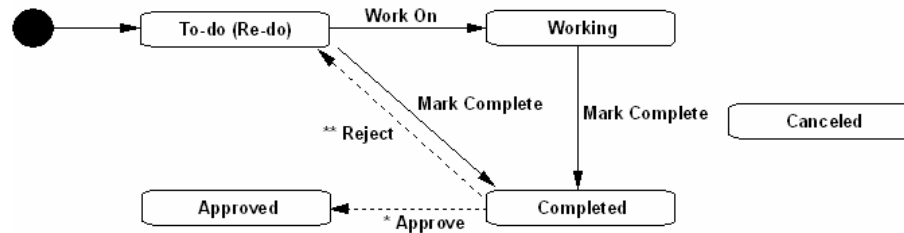
- **Workspace administration tool**
  - ▶ Create and cancel workspaces, task groups, and tasks
  - ▶ Assign approvers to task groups and content contributors to tasks
  - ▶ Approve a task group
  - ▶ Change a task's state to complete
- **Management Center tool**
  - ▶ View and work on tasks
  - ▶ Preview changes
  - ▶ Approve a task group



As in version 6, there is one tool for administering workspaces and another for working on tasks. The Workspace administration tool remains the same as in version 6. You use this tool to create and cancel workspaces, task groups, and tasks. It is also used to assign approvers to task groups and content contributors to tasks.

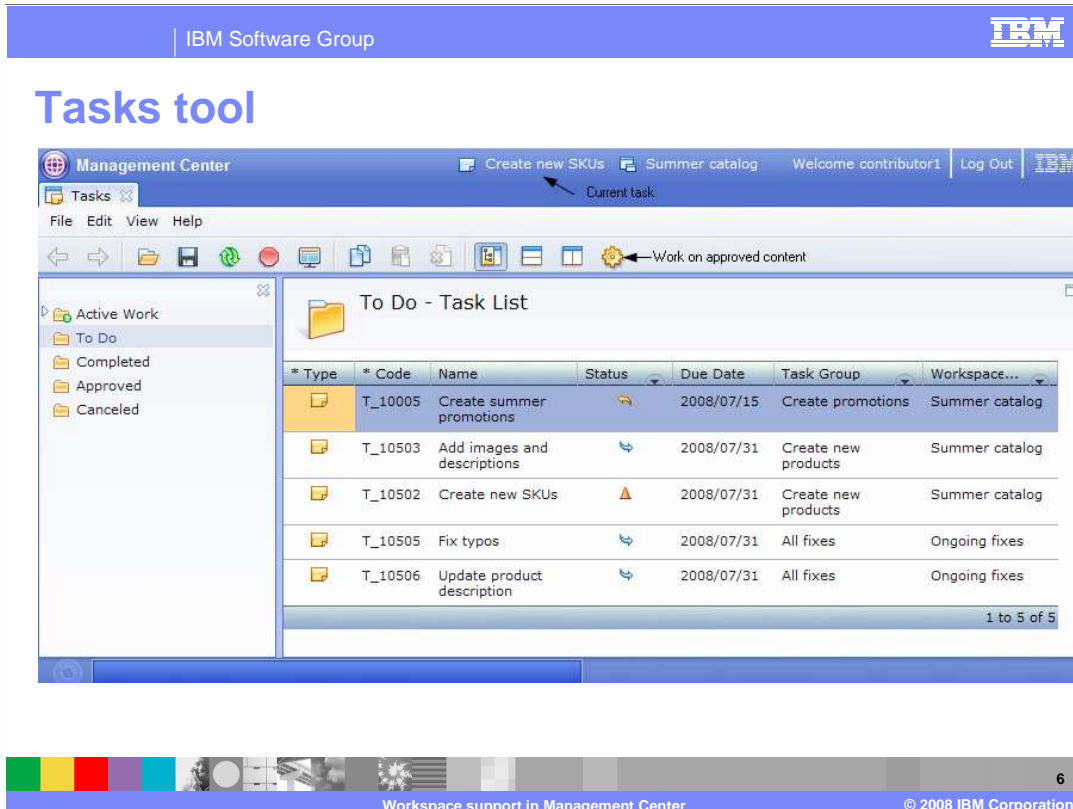
New in feature pack 4 is the workspace support in the Management Center tool. The Management Center gives you the ability to view assigned tasks, work on tasks, complete tasks and approve task groups. A new preview environment is also included. The remainder of this presentation will discuss the workspace support in Management Center in more detail.

## Contributor task life cycle



This diagram reviews the states that a contributor task can be in and the actions supported in Management Center. The states To Do, Completed, Approved and Canceled correspond to four task lists available in the tasks tool.

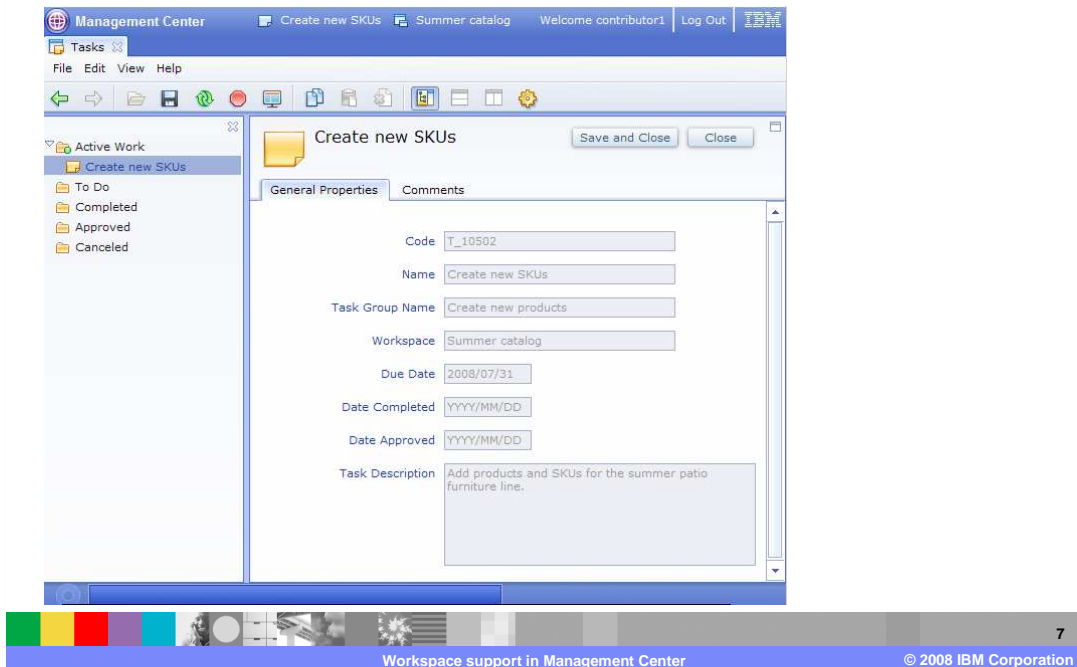
All contributor tasks first appear with a state of To Do. Selecting Work On from the pop-up or edit menus changes the task to Working state. In Management Center, tasks remain in the To Do list marked with a special status icon. From either To Do or Working states, a task can be moved to the Completed state by selecting Mark Complete from the pop-up or edit menus. Once all tasks in a task group have been marked complete, the approver can view the changes and, if they are acceptable, change the state to approved. If further work is needed, the approver can reject the task group and the task state changes to Re Do. Re Do tasks are marked with a separate icon in the To Do list but have the same operations as To Do tasks. At any time a task group and all associated tasks can be canceled through the workspace administration tool.



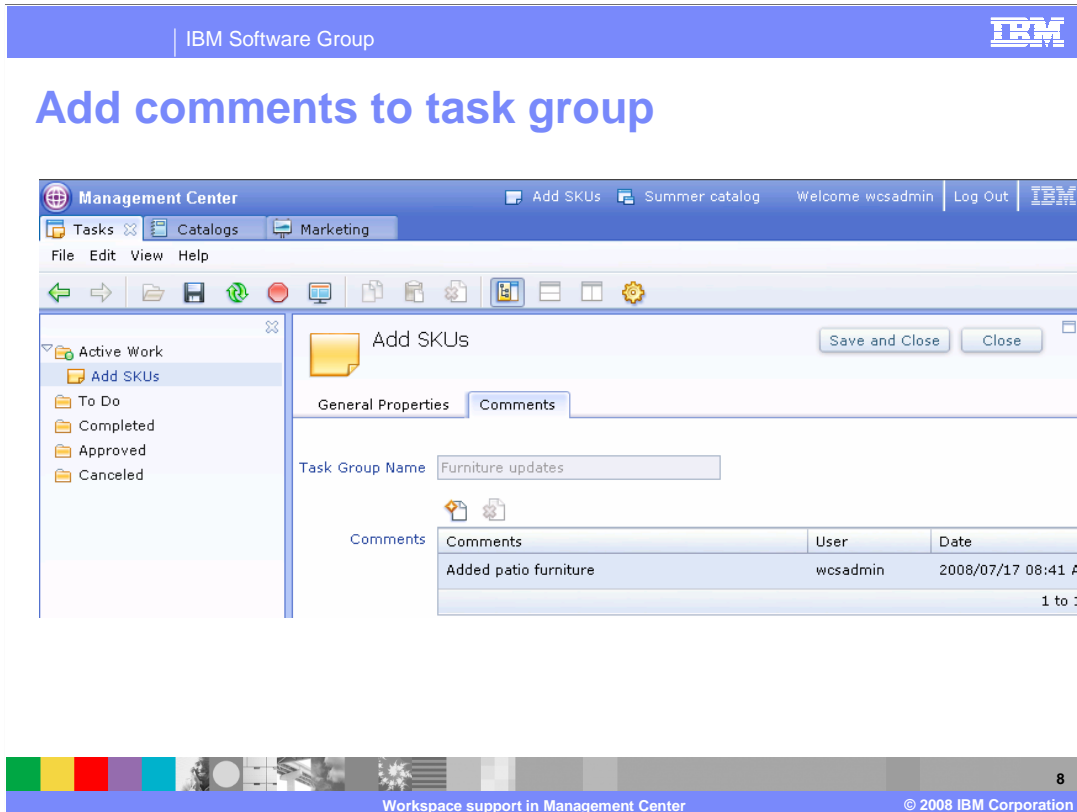
The Management Center includes a new tasks tool. When workspaces are enabled, the tasks tool is opened automatically when you launch Management Center. It can also be opened from the Management Center menu. The tasks tool separates your tasks into four different categories, To Do, Completed, Approved and Canceled. The To Do list is shown here and is the list you work with most often. Notice that there are three icons shown in the Status column. In the first row, there is an arrow pointing to the left. This indicates a task that was marked complete by a contributor but rejected by the approver resulting in a Re Do state. In rows two, four and five, you see an arrow pointing to the right. This is the symbol for To Do, tasks you have not yet completed. Finally, row three contains the symbol for Work On. This marks the task that you are currently contributing content to. Notice that this task and workspace name are displayed at the top of the page. This information remains when you open other Management Center tools. You can indicate the task you are currently working on through the pop-up menu or the edit menu in the menu bar. Similarly, when you have completed a task you can choose to mark it as complete using the same menus.

One additional thing to note on this screen is the gear icon at the right side of the toolbar. Clicking this button allows you to work directly on the approved content rather than work within a workspace. In order to change content in any of the other Management Center tools you must either select a task to work on or click this button. If neither is selected all tools will operate in read only mode.

## Task properties



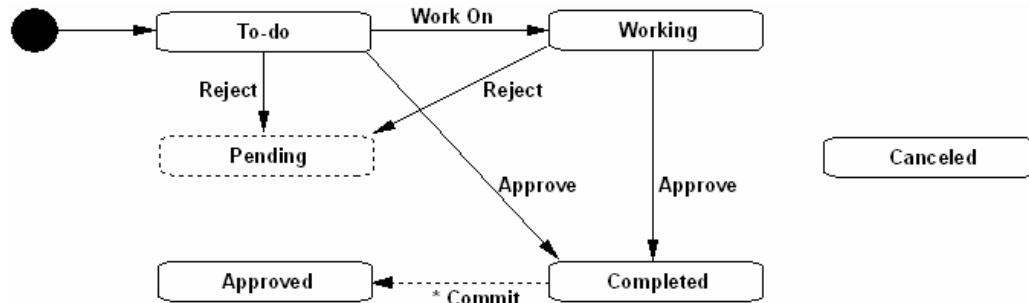
Double clicking on a task brings up the task properties pane. The information displayed here is specified in the workspace management tool when creating the task groups and tasks. In Management Center the properties are read only.



You can use the Comments tab to add notes about the changes you have made for a specific task. Comments are stored at the task group level. All comments are visible to the task group approver.



## Approval task life cycle



The states of an approval task follow a similar flow as the states of a contributor task. The task arrives in To do state when all tasks in a task group are marked complete. Selecting Work On from the pop-up or edit menu allows the approver to preview changes made in the task group. Selecting Approve from the pop-up or edit menu moves the task to the Completed state. The task remains in Completed state until the task group is committed to production at which time it moves to Approved. If the changes made in the task group are not acceptable, the approval task can be rejected from its To Do or Working state. Selecting Reject causes the associated content tasks to enter the Re Do state and the approval task moves to a Pending state. Approval tasks in a Pending state are not displayed in Management Center. When the tasks in the task group are resubmitted the approval task reappears in To Do state.

If a task group is canceled before it has been approved, the approval task is also canceled.

## Approving tasks

The screenshot shows the Management Center interface with a 'To Do - Task List' table. The table has the following data:

* Type	* Code	Name	Status	Due Date	Task Group	Workspace
	T_10002	Update descriptions			Product fixes	Quick fixes
	T_10503	Fix typos			Product fixes	Quick fixes
	T_10501	T_10501 -- Approval Task (New furniture line)			New furniture line	Fall catalog

A context menu is open over the T\_10501 row, showing options: Open, Copy, Select All, Deselect All, Work On, Approve, Reject, Settings..., and About Adobe Flash Player 9... A 'Store preview' button is highlighted in the toolbar.

The To Do list for a task group approver looks similar to the list for a content contributor. The one difference is the addition of a new type of status icon shown in row three here. This icon signals an approval task for the approver. Notice that this approver is also a content contributor and content To Do tasks are in the same list as the approval To Do task. An approval To Do task is generated automatically as soon as all tasks in a task group have been marked complete. Before approving or rejecting a task group, an approver can choose to Work On the approval task. Selecting Work On allows the approver to see the changes made by the content contributors before they are promoted to the base approved content. The approver can view the changes either by opening one of the Management Center tools and viewing the modified objects or opening the store preview dialog. The store preview dialog can be launched from the toolbar.

Double clicking on an approval task displays a read only properties page for the task group. On the comments tab, approvers can see any comments added by contributors and add comments themselves.

## Preview environment

Store Preview Options

What store URL do you want to preview? (Default is store home page)

Store Address

Store Alias

**Options**

What is the current start date and time inside the preview?

Current date and time  
 Specify date and time

Does time elapse in the preview?

Time in preview does not change as real time elapses  
 Time in preview elapses as real time elapses

Product recommendations

Store Preview

Preview start date and time (Year/Month/Day Hour:Minute:Second): 2008/07/05 08:51:17  
 Product recommendations: using inventory levels from database  
**Time is not elapsing in the preview.**



Clicking the store preview icon on the toolbar launches the store preview options dialog shown here on the left. Using this dialog, approvers can select the parameters under which they want to test the store. These parameters are the same as the store preview function in accelerator. The store address drop down list contains predefined store URLs. Store URLs can also be modified directly in this dialog which is not possible using accelerator.

Clicking the launch store preview button opens a new window to the specified URL. The store operates under the parameters specified in the options dialog. The options selected are summarized in a store preview details section displayed at the top of the page. A sample of this is on the right. You can collapse the details section by clicking hide details. The show marketing spots button toggles whether to highlight the e-Marketing spots present on a page.

## Change control in Management Center

- Workspace locking
- Task group locking (default)
- Task locking
- No locking
- Changes to locking policies



Locking policies in workspaces allow you to control how changes are made and who is able to make the changes. A locking policy determines if managed assets are locked to a workspace, task group, or task, or if they are not locked at all. The locking policy applies to the entire WebSphere Commerce site and is not configurable by store.

There are four possible locking policies initially available in WebSphere Commerce.

With workspace locking, a managed asset is locked to the workspace when the first change is made to the asset within the workspace. Workspace content contributors assigned any task in the workspace can make changes to the locked managed asset. Other users cannot change the asset.

When the task group locking policy is enabled, a managed asset is locked to the task group in which a workspace content contributor first changes the asset. Task group locking is the default locking policy for workspaces.

With task locking, a managed asset is locked to the task in which a workspace content contributor first changes the asset. The final option is to have no locking. This means there are no restrictions on changing managed assets in a workspace. Any user in any workspace can change managed assets.

Once locked, managed assets remain locked until a workspace, task group, or task is completed or canceled, depending on the locking policy. In feature pack 4, the workspaces lock in the Management Center prevents you from working on a locked object in the base until the task the object is under is approved.

## Change control in Management Center

The screenshot displays the IBM Management Center interface. At the top, a blue header bar contains the text 'Task C', 'Summer catalog', and 'Welcome'. Below this, a toolbar with various icons is visible. The main content area shows a barcode and the object ID 'FUDE-0101' with a note '(Some fields may not be editable)'. Below the object ID, there are tabs for 'Manage SKU', 'Descriptive Attributes', 'Defining Attributes', 'Merchandising Associations', and 'Associations'. The 'Object Properties' section is expanded, showing 'Change Made In Workspace' as 'Ongoing fixes', 'Task Group' as 'All fixes', and 'Task' as 'Task A'. The 'General SKU Information' section is also expanded, showing a text field for '\*Code' with the value 'FUDE-0101'. At the bottom of the screen, a blue footer bar contains the text 'Workspace support in Management Center' and '© 2008 IBM Corporation'.

This screen capture shows an example of a locked object. Notice that the workspace name at the top of the screen is different than the workspace name in the object properties area. Since locking is in effect, this object cannot be changed under the current workspace until the existing change is completed or canceled. The property information is still visible but is read only.

## Troubleshooting

- Why an object is read only
- Why you cannot see your changes



An object can be read only for one of three reasons. First, it might have been modified by another user in another workspace, task group or task and the locking policy in place prevents you from making a competing change. The object will be editable again as soon as the preceding change is committed to the approved content. The second reason an object can be read only is you have not selected a task to work on or selected to work on approved content. You must select the work on approved content button in the tasks tool or all other tools in Management Center will be read only. Finally, in an e-sites environment, an object might be read only because it belongs to an asset store and you do not have access to modify it. See the ESitesOverview presentation for more details.

Just because you modified an object does not mean you will always be able to see your changes. Changes you make are local to a workspace are only visible within that workspace. You cannot see your own or anyone else's changes if you are working in a different workspace from where the change was made or if you are working on approved content. The changes will be visible in other workspaces and the approved content once the task group containing the changes is approved.

## References

- Workspaces

<http://publib.boulder.ibm.com/infocenter/wchelp/v6r0m0/index.jsp?topic=/com.ibm.commerce.workspaces.doc/concepts/cwooverview.htm>

- Locking policies

<http://publib.boulder.ibm.com/infocenter/wchelp/v6r0m0/index.jsp?topic=/com.ibm.commerce.workspaces.doc/concepts/cwolocking.htm>



Here are some additional references that might be helpful as you work with workspaces.

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