Welcome to the WebSphere Commerce V6 presentation. This unit describes the steps, which are necessary for administering WebSphere Commerce V6 add-on components such as IBM Gift Center and IBM Sales Center.

IBM

Unit objectives

- List administration tasks for the IBM Gift Center

- List administration tasks for the IBM Sales Center

IBM Gift and Sales Centers

This presentation lists administration tasks for the IBM Gift Center and IBM Sales Center.

WebSphere Commerce add-ons

- IBM Gift Center
  - ▶ Complete multi-channel gift registry solution
- IBM Sales Center
  - ▶ Rich client designed for use in an inbound call center

Integrate

Install

Configure

Administer
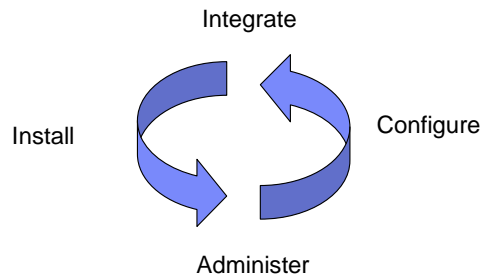
These components can be purchased separately.

Two new add-on features can be purchased for use with WebSphere Commerce V6.

IBM Gift Center for WebSphere Commerce is a complete multi-channel gift registry solution. It can operate as a Web-only gift registry, integrate to an existing back end registry system, or stand on its own as a centralized cross channel solution. It leverages the marketing and merchandising capabilities of WebSphere Commerce and provides integration points to your point of sale system, store kiosks, and scanning devices

The IBM Sales Center for WebSphere Commerce is a rich client designed for use in an inbound call center. It leverages the catalog, order management, promotions, and merchandising capabilities of WebSphere Commerce to provide your contact center representatives with the functionality they need to service and up-sell your cross-channel customers.

Installing IBM Gift Center

- Enable the IBM Gift Center
  - ▶ Run the enablement script
    - Checks to see if IBM Gift Center is already installed
    - Loads the IBM Gift Center access control policies
    - Registers IBM Gift Center commands
    - Updates the instance configuration file
    - Updates the WebSphere Commerce EAR
  - ▶ Stop and restart your server

- Install the IBM Gift Center sample applications
  - ▶ Publish Consumer Direct model with non-ATP inventory
  - ▶ Install the Web channel sample

IBM Gift and Sales Centers

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You can use the enablement script to enable IBM Gift Center. The enablement script does not create any new roles or add any user interface capabilities.

If you have already published the Consumer Direct store with available to promise (ATP) inventory, you can update the database to change the store to non-ATP by setting the STORE.INVENTORYSYSTEM value to negative two for your store.

IBM Gift Center samples

- Three sample applications are available
  - ▶ Online/Web channel
  - ▶ Gift consultant
  - ▶ Kiosk
- Samples are packaged as store archives

There are several sample applications, which demonstrate the multi-channel capabilities of the IBM Gift Center. You can download the applications from the WebSphere Commerce support site at www.ibm.com/support. The samples are packaged as store archives and can be installed using the WebSphere Commerce administration console. The Web channel sample must be installed before installing any of the other sample applications.

New access control policies

- Access control policies
  - Registered users can create and update registries
  - All users can browse and purchase from registries
  - A customer service representative can create a gift registry on behalf of a user

- Access group
  - GiftRegistryManagersForOrg

- Relationships
  - Registrant
  - Co-registrant
  - Giftgivers

The enablement script loads new commands and access control policies into the database but none of these capabilities are exposed until you install the sample applications.

One new access group is created called *GiftRegistryManagersForOrg*. By default, users with the roles of seller, customer service representative, customer service supervisor, or operations manager are implicitly members of this group. This group is associated with policies that allow these administrators to manage gift registries. For example, a customer service representative can update a user's gift registry.

Three new relationships are defined for fine-grained access control purposes. These are *registrant*, *co-registrant*, and *giftgivers*. These roles cannot be assigned through the WebSphere Commerce Organization administration console but they are related to the ownership of resources in the access control policies.

Depending on your business needs, you may need to customize these access control policies.

IBM Gift Center business rules

- Twelve new business rules loaded
  - ▶ Maximum number of registries per registrant
  - ▶ Maximum number of items for a registry
  - ▶ Eligibility for completion program

- Rules are defined in gift_registry.xml (within the store archive)

- Rules are stored in the GRREGRULE table

- Manual changes to the rules require registry refresh
  - ▶ GiftRegistryRuleRegistry

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You can enable the business rules at both the store and the event levels.

Twelve sample business rules are loaded into the GRREGRULE database table when the Web sample application is published. This data is specified in the gift_registry.xml file within the store archive and can be customized to fit your business rules. For example, you can choose to limit registries to three per registrant instead of ten. A new cache registry component called GiftRegistryRuleRegistry can be refreshed using the WebSphere Commerce administration console.

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Integration with existing WebSphere Commerce site

- Deploy new JSPs
  - ▶ Deploy new header or footer
  - ▶ Deploy new set of JSP pages

- Configure messaging system for inbound and outbound messages

- Security and access control

If you want to integrate the online sample application with your consumer direct store, you would need the developers to provide a new header or footer with a link to the new JSPs. In addition, you may need to deploy new JSPs for the gift center, which match the appearance and functionality of your store.

The IBM Gift Center is a multi-channel solution and so many administrative tasks are going to be related to the integration of these systems.

IBM Sales Center installation prerequisites

- Hardware
  - ▶ Intel® Pentium® III IBM-compatible personal computer
  - ▶ A minimum of 384 MB of RAM
  - ▶ A minimum of 350 MB of free disk space on your target installation drive
  - ▶ A graphics-capable monitor with a screen resolution of 1024x768
- Software
  - ▶ Windows® XP, Service Pack 1

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This slide lists IBM Sales Center installation prerequisites.

Installing IBM Sales Center

- Quick
  - ▶ Installs Sales Center client
  - ▶ Installs WebSphere Everyplace® Deployment for Windows and Linux®
  - ▶ Suitable for demonstration and evaluation purposes

- Production
  - ▶ Need additional software and skills
  - ▶ Create and deploy a base image
  - ▶ Use post deployment provisioning mechanism to add additional features
  - ▶ Automating the process can be beneficial

Quick Install requires very few inputs from you. The InstallShield will only ask for the directory in which you would like IBM Sales Center installed. Upon first launching the software, a WebSphere Everyplace Deployment window opens. This is the WebSphere Everyplace Deployment workbench. This interface provides the window management capabilities to host several applications. WebSphere Everyplace Deployment for Windows and Linux is a client offering that provides the Java™ environment and tool kit used to build, deploy, and manage server-managed client applications.

IBM Sales Center is designed to be used in inbound call centers, which means it is very likely that you will need to install and configure many machines. Even if you only had fifty machines, you would probably not want to individually set up and run Quick Install on each one. If you have five hundred machines, an automated process for deployment and administration becomes almost mandatory.

WebSphere Everyplace Deployment

- Client platform provides install, launch, and management for multiple applications within an integrated application window
    - Built on the Eclipse rich client platform (RCP) framework
    - Managed client services – JVM, component framework and services (Open services gateway initiative, RCP)
    - Platform management – Update manager and enterprise management agent to install and update applications and services
    - Access services – relational database, transactional messaging, Web Services, local Web container, local EJB container
    - Interaction services – Integrated browser, standard widget toolkit, JFace, workbench

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This slide provides a quick overview of WebSphere Everyplace Deployment.

The Eclipse rich client platform (RCP) is built on the same core platform as the Rational Development Environment with the development tools removed.

Open services gateway initiative, bundles and applications is a framework for allowing multiple applications to live in the same JVM

The Update Manager enables end-users to install applications and components directly from standard Eclipse update sites onto the WebSphere Everyplace Deployment workbench.

The Enterprise Management Agent works cooperatively with the Device Management Server provided by the WebSphere Everyplace Deployment server to perform management operations. An administrator can schedule management jobs for devices that include software installation, update, and configuration. When installing and updating software components, the management system determines which components are already on the device and then installs only the missing components.

Post deployment provisioning

- Eclipse update manager
  - Install customizations
  - Apply updates
- Device management server install customizations
  - Apply updates
  - Manage client configuration centrally
- Other automated software distribution systems
  - Install customizations
  - Apply updates
  - Manage client configuration centrally

Once the initial client image is installed, you can deploy additional Eclipse features and make customizations. There are three provisioning mechanisms available to support customizations and updates. Each mechanism requires a different infrastructure and imposes a different minimal initial client installation to enable post deployment provisioning and updating.

The choice between these methods is made based on the required degree of automation. You also need to consider whether a user must be running the client when the installation occurs. The decision should take into account any prior commitment to one of the infrastructure technologies. An enterprise that has deployed a management and software deployment technology may prefer to extend its existing infrastructure to accommodate IBM Sales Center clients rather than introducing another specific infrastructure.

Eclipse update manager can be used to manually install customizations and updates. It can be accessed through the IBM sales center.

A device management server is capable of executing a number of different types of management operations on a variety of different device types. Tivoli device management server is not supplied with WebSphere Commerce or IBM sales center.

IBM Tivoli configuration manager is an example of another automated software distribution system. Configuration manager is a highly scalable system for monitoring, installing, and controlling IT resources across the enterprise. Its software distribution and inventory monitoring can be implemented over large numbers of geographically distributed clients.

Configuring the connection to WebSphere Commerce

- A WebSphere Commerce instance must be installed
- A store must be published
- You will need to know the fully qualified host name of the production system
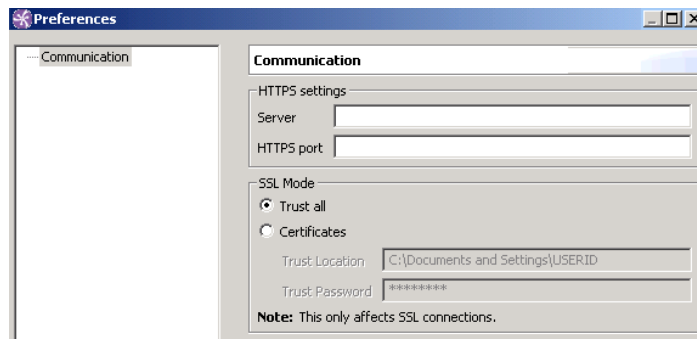
To use the capabilities of IBM Sales Center, the application needs to know how to connect to the WebSphere Commerce application. If the communication preference is not already configured, you will be asked for it when first logging on. You can change the server settings later by selecting **File-->Preferences-->IBM Sales Center-->Communication**. You must launch the IBM Sales Center with administrator capabilities to enable this preference.

The server name should be the fully qualified host name of the production system. The HTTPS port that should be used is the port configured for the WebSphere Commerce Accelerator. This port is 8000 by default.

IBM Software Group

IBM Sales Center preferences

Default preference options
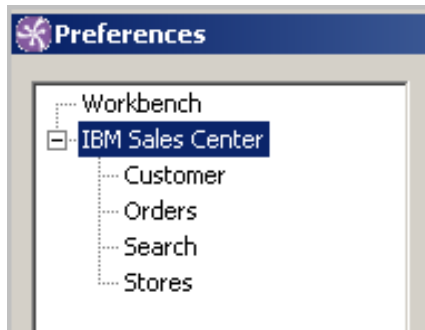
Preferences when launched with –clientAdmin flag

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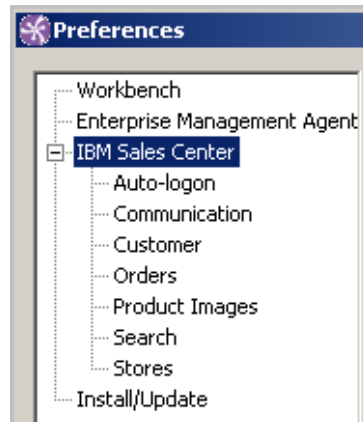
You would typically see the default preference options. You can configure default preferences like preferred locale, currency, and languages. You can also specify which store should be enabled for autoselect.

When launching the tool with the –clientAdmin flag, several additional preferences are enabled. These preferences include the communication preferences for communication with the WebSphere Commerce Server, auto-logon, and the Enterprise Management Agent.

An auto-logon feature is provided with the IBM Sales Center and is enabled by default. When the WebSphere Commerce tool launches you must provide authentication information. Auto-logon keeps you from having to enter the authentication information each time you launch a tool. Access control checks are done based on the identity of the IBM Sales Center user.

The Product Images feature allows you to configure whether product images should be displayed in the IBM Sales Center and how often they should be retrieved. The images will be stored locally, which makes display faster.

Install and Update feature has configuration settings for update preferences such as the maximum number of History configurations.

Enterprise Management Agent allows you to configure the connection to a Device Management Server. Once the connection is enabled, you will have no control over the installation, configuration, and uninstall of features. The agent can be configured to periodically poll the Device Management Server for jobs. However, the Device Management Server can also notify the agent to connect and then perform a management job, such as install software.

Managing features

- Application menu
  - ▶ Install
    - Install new features
  - ▶ Application Management
    - Enable or disable features
    - Update features
    - View the current configuration

IBM Sales Center for WebSphere Commerce

Manage the current WebSphere Everyplace Deployment configuration.

Available Tasks

Scan for Updates
  Search for updates for all the installed applications.

View Installation History
  View all activities since the installation of the product.

Show Activities
  View the activities that caused the creation of this configuration.

Restore Previously Installed Features
  Restore features that were installed but are not linked to this version of WebSphere Everyplace Deployment

Revert to a Previous Configuration
  You can revert to one of the previous configurations if you are having problems with the current one.

Two other menu options are exposed with the –clientadmin flag. They can be accessed from the Application menu. The picture on the slide shows the Application Management menu.

Other IBM Sales Center related tasks

- Manage member groups
  - ▶ Create CSR teams
  - ▶ Create customer territory groups
  - ▶ Assign customers to CSRs by territory, organization, and user

- Set up CSR reports
  - ▶ May need to install WebSphere Commerce Analyzer
  - ▶ View reports through WebSphere Commerce Accelerator

Several member groups are pre-defined in WebSphere Commerce for use in the IBM sales center. A seller administrator or site administrator using the WebSphere Commerce organization administration console can administer these member groups.

Member groups of type customer service Representative (CSR) group are intended for defining teams of customer service representatives. Every CSR in turn can have customer territory groups or customer accounts assigned to them.

Member groups of type customer territory group are intended for creating groupings of customers, typically by geographical location. Customers can be implicitly grouped by organization, registration status, various demographic details, and location. Customers can also be explicitly included or excluded if necessary. By default, these groups are used for assigning ticklers to CSRs using the IBM sales center. Other groups can be assigned for setting price override limits.

WebSphere Commerce provides reports on CSR performance and activities, including reports on revenue, sales, orders, price overrides, performance ranking, profit, quotations, customer organizations, and customer territories. These reports are available for individual customer service representatives or per CSR team. The reports are available for viewing in the WebSphere Commerce accelerator.

The majority of these customer service reports are created with data from WebSphere Commerce analyzer. As a result, you must install and configure WebSphere Commerce analyzer to use and view these reports. A few customer service reports are available without installing WebSphere Commerce analyzer. These reports are generated using the operational data in the WebSphere Commerce database.

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Enabling WebSphere Commerce analyzer reports

- Install and configure WebSphere Commerce Analyzer
    - ▶ Refer to the Additional Software Guide

- Configure the WebSphere Commerce connection to WebSphere Commerce Analyzer

- Enable the listeners and events for the reports
    - ▶ Basic
    - ▶ Product advisor
    - ▶ CSR reports

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You will need to install and configure WebSphere Commerce analyzer according to the instructions in the WebSphere Commerce additional software guide. Then you will need to configure the WebSphere Commerce connection to WebSphere commerce analyzer using the WebSphere Commerce configuration manager tool. Finally, you will use the configuration manager to enable all of the required listeners and events.

WebSphere Commerce analyzer is an optional application included with WebSphere commerce. When installed, it can provide a robust business intelligence solution designed to analyze and report on the activities of your customers. With WebSphere Commerce analyzer, you can produce business intelligence reports on marketing, sales, orders, and user security and authority.

Recommended courses

Formal education exists for this product and you can find information on recommended training paths and certification tests at these links.

- Application developer for WebSphere Commerce V6
  http://www-304.ibm.com/jct03001c/services/learning/ites.wss/us/en?pageType=page&c=a0011792

- Business user for WebSphere Commerce V6
  http://www-304.ibm.com/jct03001c/services/learning/ites.wss/us/en?pageType=page&c=a0011793

- System administrator for WebSphere Commerce V6
  http://www-304.ibm.com/jct03001c/services/learning/ites.wss/us/en?pageType=page&c=a0011794

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