



IBM Software Group

# WebSphere® Commerce V6.0 Feature Pack 3

*User interface overview*



@business on demand.

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Welcome to the Websphere Commerce Feature Pack 3, user interface overview.

## Goals

- Show the motivations behind the creation of IBM Management Center for WebSphere Commerce
- Introduce the new features of the new user interface



The goals of this presentation are to show the motivations and objectives for the creation of the new user interface, which is the IBM Management Center for WebSphere Commerce. The presentation will also introduce the navigation and general features of the interface.

## Agenda

- Management Center overview
- Overview of features
- Business roles and access
- Opening the Management Center
- Basic components



This presentation will first discuss an overview of the Management Center and why it was created. Next, the presentation will go over a list of the features available in the Management center along with what roles have which access. Finally, it will look at each component of the Management Center in detail.

## IBM Management Center for WebSphere Commerce

- IBM Management Center for WebSphere Commerce or Management Center for short
- Create, update, and maintain merchandising and marketing tasks for stores using the B2C and B2B business models
- Solution addresses some improvements that can be made from previous tools
  - ▶ Catalog management
  - ▶ Promotion management
  - ▶ Marketing management



The Management Center was created to improve the existing Accelerator tool. Feature Pack 3 focuses on the catalog, promotion and marketing tools. The IBM Management Center for WebSphere Commerce, or Management Center, is the next generation line of business user tools for managing business task for online businesses. It is intended for a business user to create, update, and maintain merchandising and marketing tasks for stores using the B2C and B2B business models.

In catalog management, you can create and manage master and sales catalogs. This includes defining categories, creating products and SKUs, categorizing SKUs and bundling SKUs. You can manage product content, and create merchandising associations.

In promotion management, you can create and manage promotions for your merchandise. Review and manage marketing promotions using the promotions calendar view.

In marketing management, you can design creative marketing campaigns containing Web and e-mail activities. Define the flow of marketing activities using activity templates and change marketing activities through the marketing activity builder. You can also review and manage marketing activities using the activities calendar view.

## Management Center user interface design overview

- Use of UI shell for common tools management
- Use of status indicator and progress indicator
- Display related information using split frame
- Access to multiple tools at the same time
- Integrated help support
- Complete the same tasks in various ways
- Navigate using the explorer view
- Drag and drop elements
- Format rich text
- Edit in place
- Personalize your Management Center



Here is an overview of the new features in the Management Center.

The use of an UI shell allows single sign-on for all tools. The progress indicator informs you of the progress of loading or save operations while still providing access to other areas of the tool to do other work. The split frame design is being used for quick access to related object information on a single page. The new UI allows each tool to be opened as a tab within the UI shell.

Help menu will be available for each tool in the application menu. You can complete tasks in the Management Center in several different ways either by menu, toolbar, right-clicking or short cut keys. Expand and collapse the explorer tree within the Management Center to locate the object you want to work with. Dragging and dropping objects across different views is also a new feature of the UI.

You can also define your user preferences by specifying a default store in the global preferences dialog. You can also define your own workspace by selecting different views to work with. You can also define your table views by reordering columns and hiding columns.

## Business roles and access

Business role	Menu
Account Representative	Catalog, Marketing, Promotions
Sales Manager	Catalog, Marketing, Promotions
Channel Manager	Marketing
Marketing Manager	Catalog, Marketing, Promotions
Seller	Catalog, Marketing, Promotions
Site Administrator	Catalog, Marketing, Promotions
Product Manager	Catalog, Marketing, Promotions
Category Manager	Catalog, Promotions
Buyer (seller side)	Catalog, Promotions



You can manage each business function using tools within the Management Center. Access the tools from the Management Center menu. Each tool displays in its own tab within the Management Center. To switch between each business tool, click on the appropriate tab. Depending on your business role and authority, from the Management Center menu, you can see and use the tools to which you have access.

## Opening the Management Center

- Setup the display
  - ▶ Set the screen area to a minimum of 1024 x 768 pixels.
  - ▶ Set the color depth to a minimum of 256 colors.
- Web browser
  - ▶ Disable or remove any pop-up blocking software
  - ▶ Use Internet Explorer® 7.0 or Firefox 2.0 or higher
- Adobe® Flash Plug-in V9.0



On the machine where you are using Management Center, set up the display.

Set the screen area to a minimum of 1024 x 768 pixels.

Set the color depth to a minimum of 256 colors.

Disable or remove any pop-up blocking software. Pop-up blocking software prevents the display of Management Center.

Do not reload a page or return back to a previous page while using the Management Center. That is, do not use the refresh keyboard shortcut (F5) or right-click and select the Refresh or Back options for the browser while using the Management Center. If you reload a window after you have entered some data, data will be lost.

Although Firefox supports the Management Center it does not support links to Accelerator.

## Basic components

- **Opening the Management Center**
  - ▶ **Log on screen**
  - Main application
    - ▶ Banner area
      - Application menu
      - Global preference dialog
      - User Identification area
      - Log out
    - ▶ Status area
      - Message link
      - Progress indicator
    - ▶ Main work area
      - Tool tabs
      - Menu bar
      - Tool bar
      - Context Menus
      - Search
      - Find
      - Store list
      - Explorer view
      - List, properties and calendar views
      - Split views
      - Utilities view
      - Configuring table columns

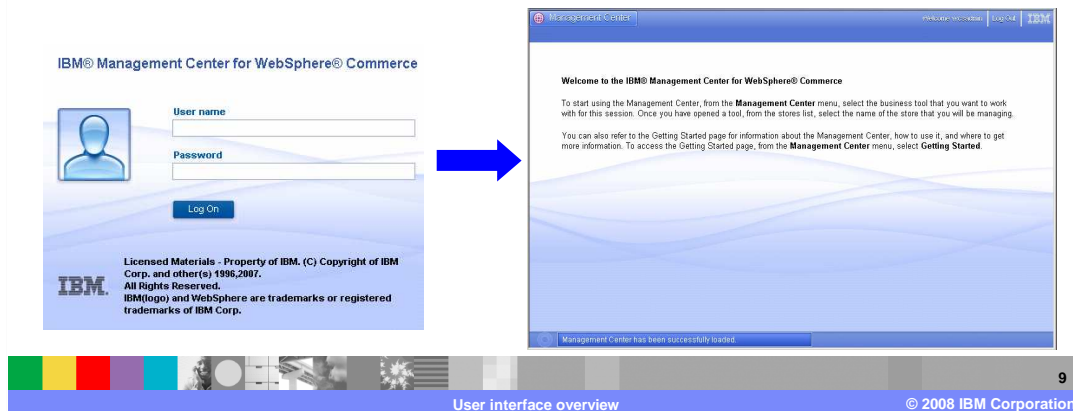


The presentation will first show how to log in to the Management Center.



## Logging in

- Access this Web address in your browser
  - ▶ <https://<host-name>:8000/lobtools/cmc/ManagementCenter>
- Log on:
  - ▶ User Name – Type your Management Center user name
  - ▶ Password – Type your Management Center logon password for this user name



To open the Management Center, use the URL shown in the slide to open Management Center. Enter your user name and password. Click Log On. Within the Management Center, from the Management Center menu select the name of the business tool you want to work with; that is select Catalog, Marketing, or Promotions. Specify the store that you want to manage.

## Changing your Management Center logon password

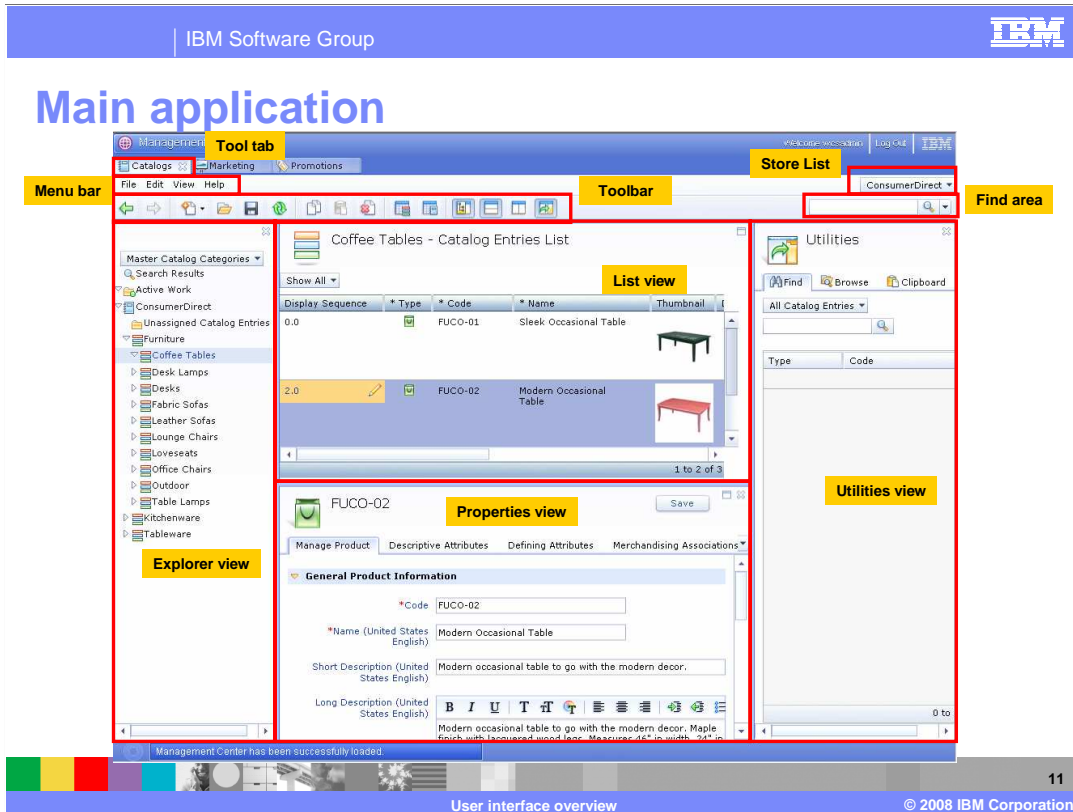
- Change password
  - ▶ WebSphere Commerce Accelerator
- Reset password
  - ▶ WebSphere Organization Administration Console



If your password is expired, you can change the Management Center password using the WebSphere Commerce Accelerator. You must know the existing password before you can change it.

If you forgot a password, you can reset the password using the Organization Administration Console. You must know the Management Center username associated with the password.

When you change the Management Center password using WebSphere Commerce Accelerator, do not open the WebSphere Commerce Accelerator from within the Management Center. This is because doing so will bypass the logon page, which you use to change a logon password.



Here is a geographical view of all the features this presentation will introduce. Notice that the Management Center is very different than the layout of the Accelerator – with colorful graphics, buttons and different panels.

## Main application components

- Main application
  - ▶ **Banner area**
    - Application menu
    - Global preference dialog
    - User Identification area
    - Log out
  - ▶ **Status area**
    - Message link
    - Progress indicator
  - ▶ **Main work area**
    - Tool tabs
    - Menu bar
    - Tool bar
    - Context menus
    - Search
    - Find
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This presentation will next look at the main application starting from the banner area.

The screenshot shows the top banner area of the IBM Management Center. On the left is a 'Management Center' menu with options: Catalogs (Ctrl+Y), Marketing (Ctrl+M), Promotions (Ctrl+U), WebSphere Commerce Accelerator (Ctrl+K), Getting Started, and Preferences. On the right, the banner area contains a 'User Identification area', a 'Log out link', and the 'IBM' branding logo. Yellow callout boxes point to these elements. A legend below the screenshot lists the four main components of the banner area.

- Banner area is composed of four main components
  - ▶ Application menu
  - ▶ User identification area
  - ▶ Logout link
  - ▶ Branding logo

The banner area is the top most area in the Shell. By default, the banner area is composed of four main components: Application menu, User identification area, logout link, and branding logo.

The Application Menu can be accessed anytime. You can hover over the Management Center menu and select a menu option. The tools can also be opened through short-cut keys. The application menu contains links to the three tools and a link to the getting started screen. The Getting Started screen helps familiarize you to the application with descriptions and viewlets of different features supported. The application menu contain a link to the WebSphere Commerce Accelerator. This link will launch a new window to bring you to Accelerator. With single sign on enabled, you will not need to log in again.

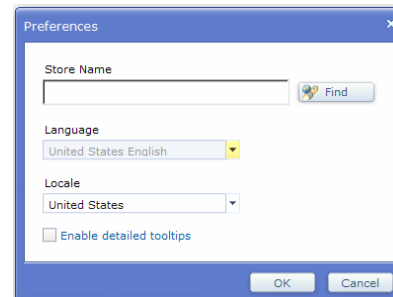
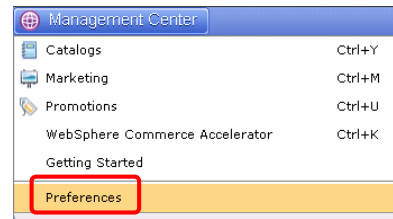
The user identification area is for display purpose only to personalize the application, there is no function associated with it

You can log out of Management Center by clicking on the logout link located beside the User Identification Area. This link is enabled all the time, but the response of the system may be different when it is clicked, depending on the state which the tools are in.

The branding logo is for display purpose only to personalize the application, there is no function associated with it.

## Global preference dialog

- Change user application preferences for the Management Center
  - Default store
  - Locale
  - Help options
- Global to the Management Center and used as the defaults
- To change the preferences
  1. Open the Management Center
  2. From the Management Center menu, select Preferences.



You can specify your preferences using the global preference dialog.

In the store name field, type the name of the store that you want to work with each time you use the Management Center. You can also search for the store name by clicking Find to open the Store search dialog, typing a store name, and clicking OK. Search results will display in the dialog.

As for the language field, this is where you can manage tasks with the Management Center. All text on the Management Center user interface will display in this language.

You can select the country or region where you will be working from with the locale field. All number and currency formats displayed in the Management Center user interface will use the formats for your location.

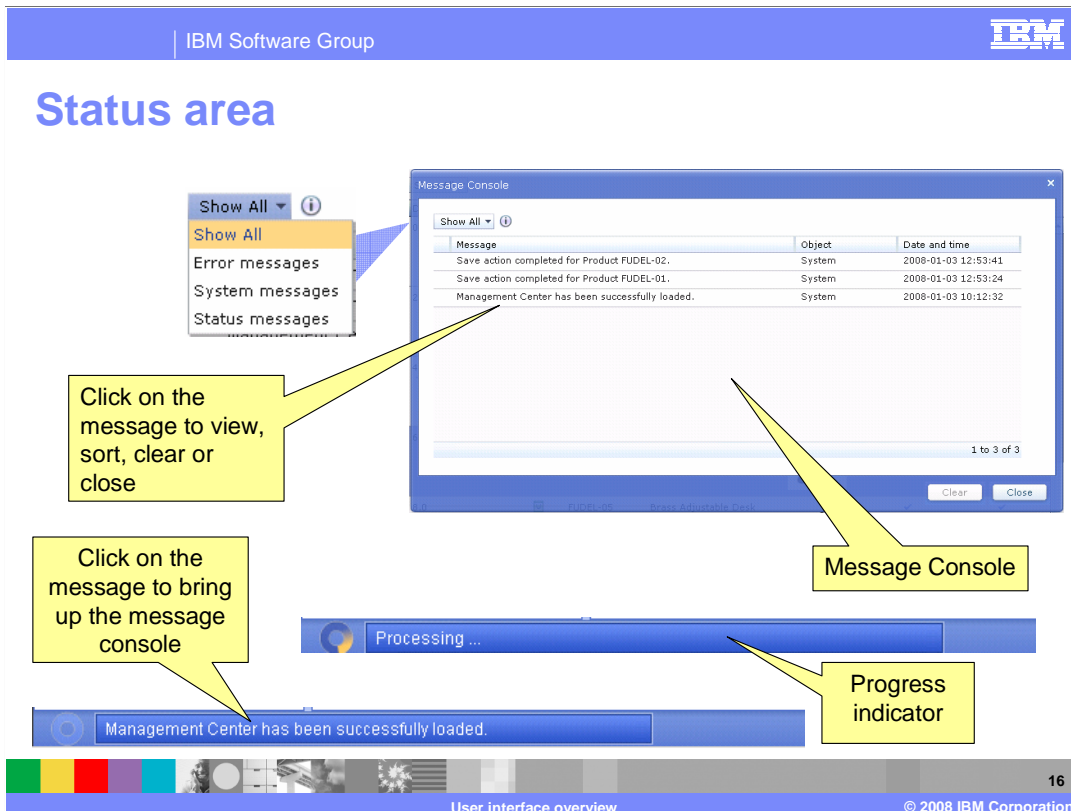
Select the detailed tool tips option if you want to view detailed help for fields that provide additional information within the Management Center. Once enabled, you will see an icon next to some user interface elements (such as a field or a list). Select the icon to learn more about the particular element.

## Main application components

- Main application
  - ▶ **Banner area**
    - Application menu
    - Global preference dialog
    - User Identification area
    - Log out
  - ▶ **Status area**
    - **Message link**
    - **Progress indicator**
  - ▶ **Main work area**
    - Tool tabs
    - Menu bar
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This presentation will now take you through the status area of the Management Center.



The message link is used to display the most current application message, and provides a link to the message console dialog. The text message is displayed as the label of a button. The text on the link button changes dynamically to display the latest application message. To access the complete list of application messages, click on the link button to launch the message console dialog. The progress indicator is a linear gauge that indicates there are processes running in the application when it is animated.

There are three types of messages.

**Status messages** indicate that an action has been taken and it has completed successfully. Status messages are informational and do not require any further action. For example, you can have a status message indicating that your changes have been successfully saved.

**Error messages** indicates that a problem has occurred with a task you have been working on during the current Management Center session. Error messages require your attention and can be fixed by using the Management Center tools. For example, you can have an error message indicating that you have not provided mandatory information while completing a task (such as not providing a unique product name when creating a new product for your seasonal catalog). You must fix this problem before you can continue. The message remains in the message console until you have addressed the problem.

**System messages** indicates that a problem has occurred in the back end. Typically, this is a problem that a business user cannot fix and requires assistance from a system administrator (for example, a connection problem or a server problem).



## Main application components

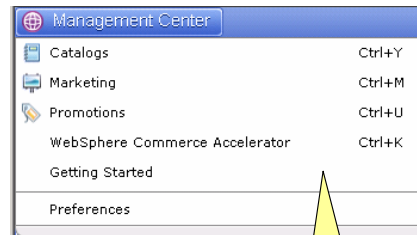
- Main application
  - **Banner area**
    - Application menu
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This presentation will now take you through the main work area of the Management Center.

## Tool tabs

- Open new tab by selecting a tool from the drop down menu in the banner area.
  - ▶ New tab will append to the list of already opened tabs
- Click on the tab to bring the tab and the work area to focus
  - ▶ Click on the [x] to close the tab
  - ▶ Inactive tabs will fade to the background

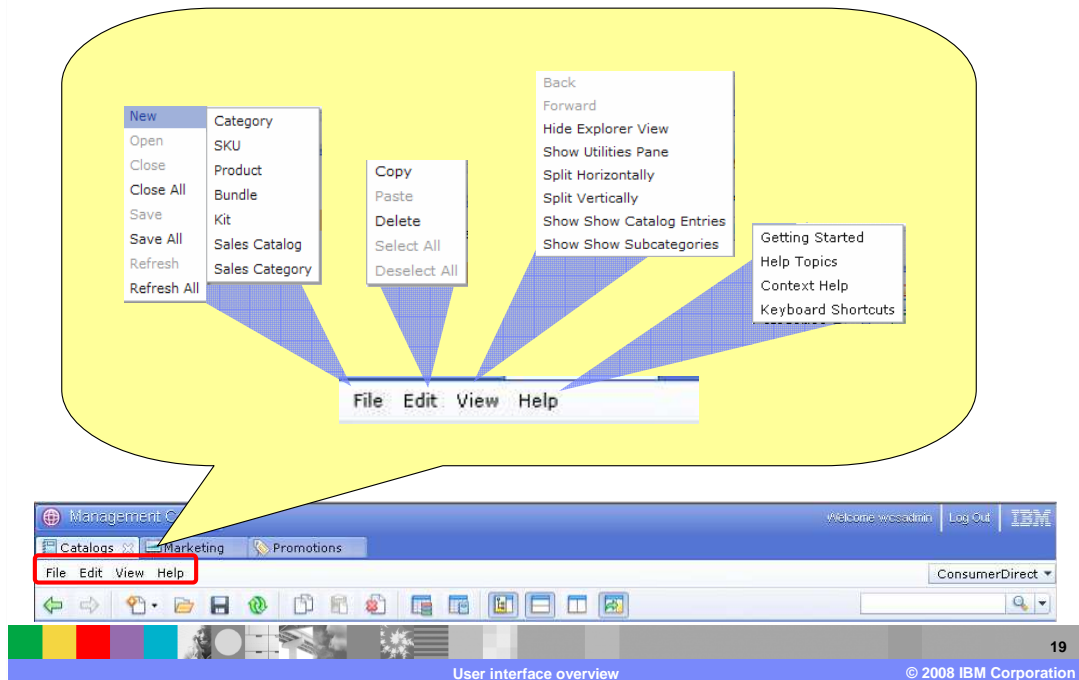


Click on one of the tools to open a new tab in the main area.



When you first launch the application after logging on successfully, there will be no tabs open. New tabs can be opened by selecting a tool from the Global Application Menu in the banner area. The tab will be appended to the list of tabs that are already opened in the area. If a tool is already opened and you select the same tool from the menu, the tab of that tool will be brought to focus. Due to the limit of space available in the tab area, some tabs may not be able to display. A drop-down that lists all the opened tabs at the right-end of the tabs area is available for you to access the tool which has been hidden. If you want to close a tab, hover over the tab and the close icon [X] will be visible, and clicking on the icon will close the tab.

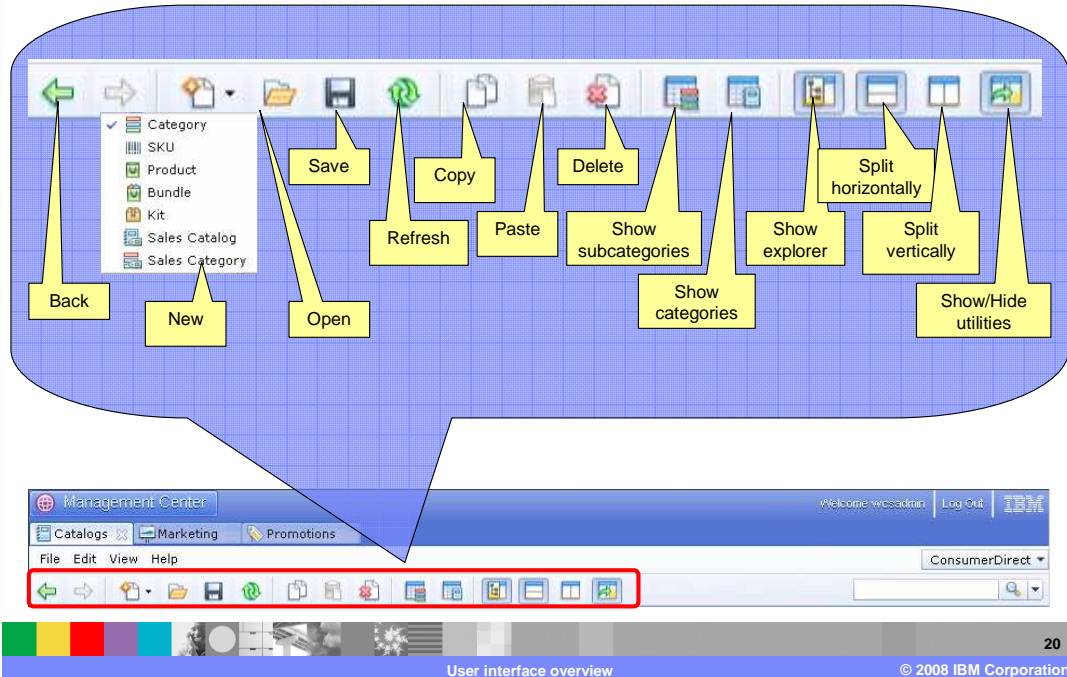
## Menu bar



The menu bar location is shown here. The menus for each of the options are expanded. Depending on the tool you are in, the New action will show different objects you can create.

Make sure the help server service is started before you try to access help material. The help topics option opens the information center in a new window. Select the context help option to access articles specific to the task you are working on in the Management Center.

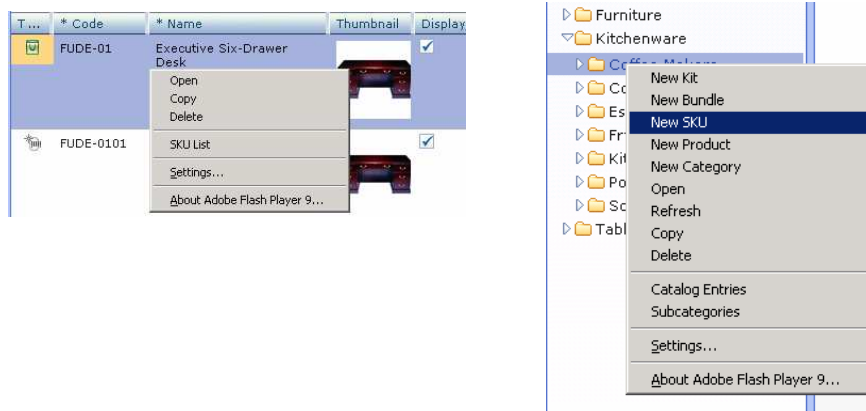
## Tool bar



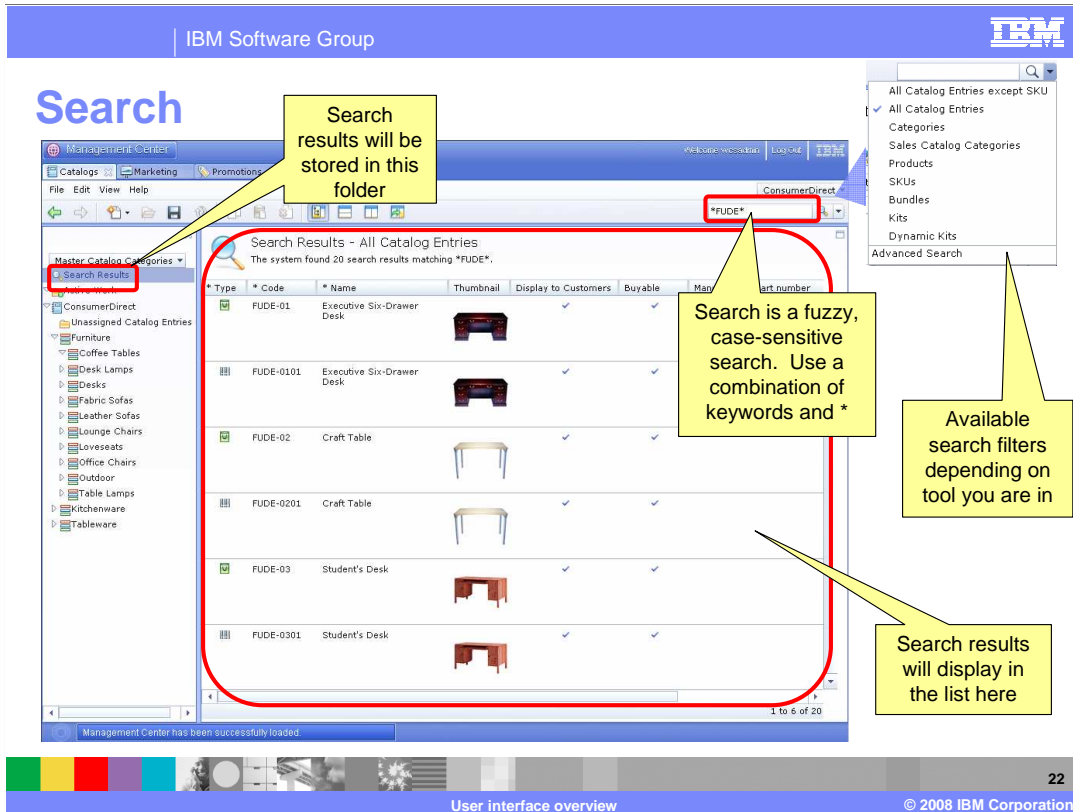
This toolbar will be available for all tools: Catalogs, Marketing and Promotions. Some actions will show different menus for example the New button, will show different objects you can create for each tool.

## Context menus

- Alternate way to get to the operations shown in Menu bar is to right click on objects to display pop-up menus.



An alternative way to access the operations you can perform on each object is to use the pop-up menus. You can access this menu by right-clicking on a particular object. Notice when you right click on a particular folder, in the explorer view, you are able to create new objects.



Use the Management Center find area to locate objects. The Management Center supports basic and advanced searches.

From the find area at the top right, type a search string in the search field, select from a list of object types to run the search. The system performs a search based on your search criteria.

You can also use the asterisk (\*) as a wildcard before or after your search string. For example, to find all products that begin with "ABC", type ABC\*; to find all products that end in "ABC", type \*ABC.

Any special characters (for example, &, %, #, @, and so on), are treated literally. The asterisk (\*); however, is only treated as literals when used between two asterisks, or when used in the middle of a string (such as 123\*789).

The results will be displayed in the main content area. They are also stored in the Search Results folder in the explorer view, so you can come back to them later. The search filters shown will be different depending on which tool you are in.

## Alternative search method - find

You can also use the find feature in the utilities view to search.

The screenshot shows the IBM Management Center interface with the following elements:

- Search Results - All Catalog Entries:** A table listing search results for the query '\*FUDE\*'. The results include:
 

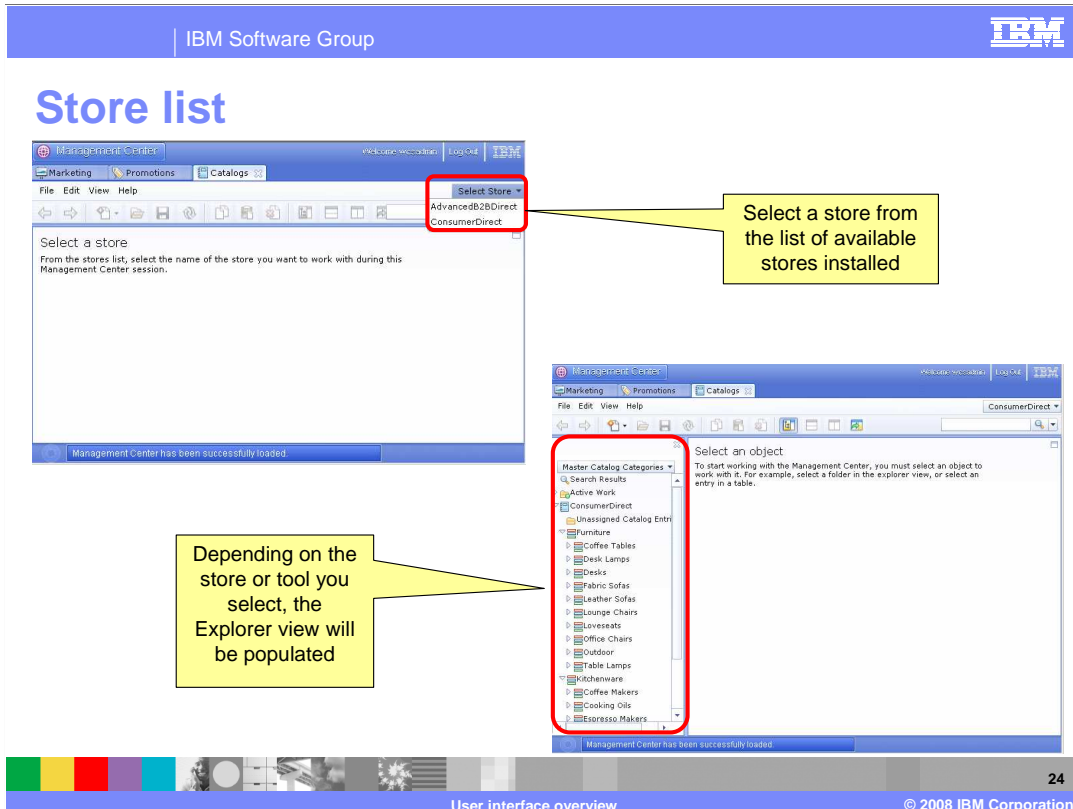
Type	Code	Name	Thumbnail	Display to Customers
	FUDE-01	Executive Six-Drawer Desk		<input checked="" type="checkbox"/>
	FUDE-0101	Executive Six-Drawer Desk		<input checked="" type="checkbox"/>
	FUDE-02	Craft Table		<input checked="" type="checkbox"/>
	FUDE-0201	Craft Table		<input checked="" type="checkbox"/>
	FUDE-03	Student's Desk		<input checked="" type="checkbox"/>
	FUDE-0301	Student's Desk		<input checked="" type="checkbox"/>
- Utilities View:** A panel on the right with a search bar containing '\*FUDE\*' and a dropdown menu for search filters. The dropdown menu includes:
  - All Catalog Entries
  - All Catalog Entries except SKU
  - Categories
  - Sales Catalog Categories
  - Products
  - SKUs
  - Bundles
  - Kits
  - Dynamic Kits

Callouts provide additional information:

- Search results will be stored in this folder:** Points to the 'Search Results' folder in the left-hand navigation pane.
- Available search filters depending on tool you are in:** Points to the search filter dropdown menu in the Utilities view.
- Use a combination of keywords and \* to search:** Points to the search input field in the Utilities view.
- Search results will display in the utilities view along with the main area:** Points to the search results table in the Utilities view.

Management Center has been successfully loaded. © 2008 IBM Corporation

An alternative search method is the find feature from the Utilities view. Similar to the search dialog, you may use a combination of keywords and wildcard \* to search. The results will be displayed below and opening the entry will display in the main content area and show up in the active work folder.



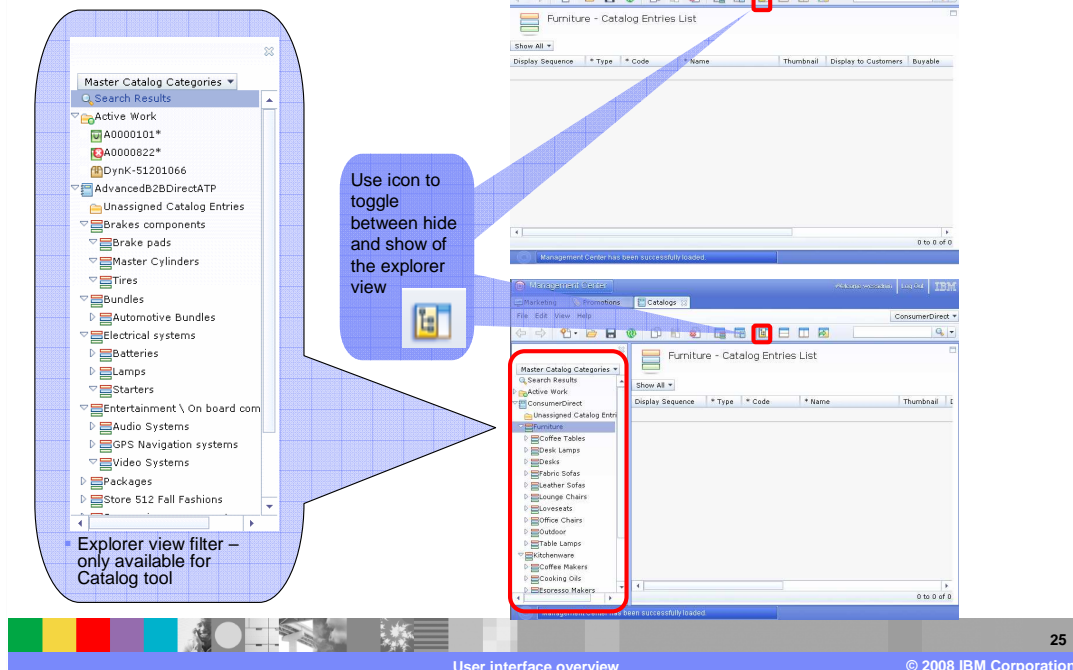
When you first open a tool, you must choose a store to work with. The Store list drop down menu has a list of all the available stores you have published. Once you select a store, you will see the explorer view populated. You may also use the global preference dialog to set a default store to be opened upon entry so you do not have to manually select a store each time.

Only stores with single languages are supported in the feature pack. Use the accelerator to remove multiple languages.

Once you select a store, you will see the explorer view populated. You may also use the global preference dialog to set a default store to be opened upon entry so you do not have to manually select a store each time.



## Explorer view



The Management Center explorer view contains an explorer tree with nodes that you can select, expand, and collapse. The explorer view controls what is displayed in the main work area. Depending on the node you select in the explorer tree, the main work area may display a list view or a properties view for an object. In addition, for the catalogs tool, the explorer view also includes a filter to display only specific objects.

Select the explorer filter from this menu to filter the contents of the explorer view. The explorer filter is available in the catalogs tool. You can view the entire master catalog or only the master catalog categories.

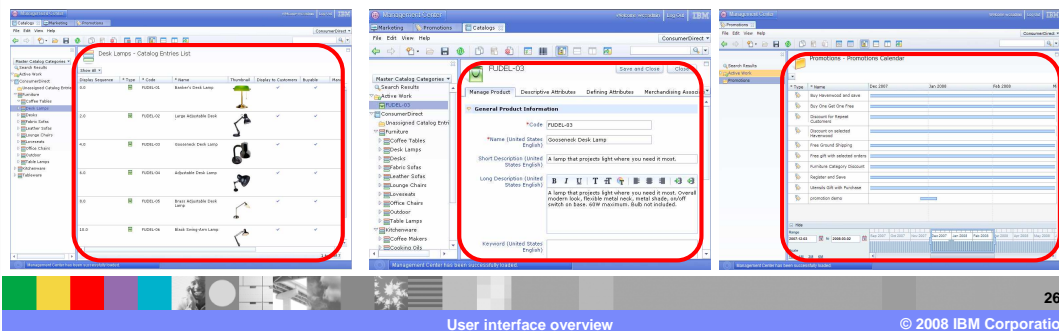
When you use the Management Center find area to search for an object, the search results display in a list within the main work area. If you navigate away from the search results list, you can return to it by selecting Search Results within the explorer view.

Expand the active work folder to list work that you have opened. You may or may not have saved this work, but you have accessed the work during the current Management Center session. Select an object from Active Work to manage it in the main work area.

If there are no visual indicators next to an object, it has no errors and has been saved correctly. If you see an asterisk next to an object, this indicates that the object has not been saved yet. A red x next to the object indicates that there is an error that needs to be fixed, and you should refer to the message console to see what the problem is. Sometimes you see both an error indicator and an asterisk if the object contains an error and is unsaved.

## List, properties and calendar views

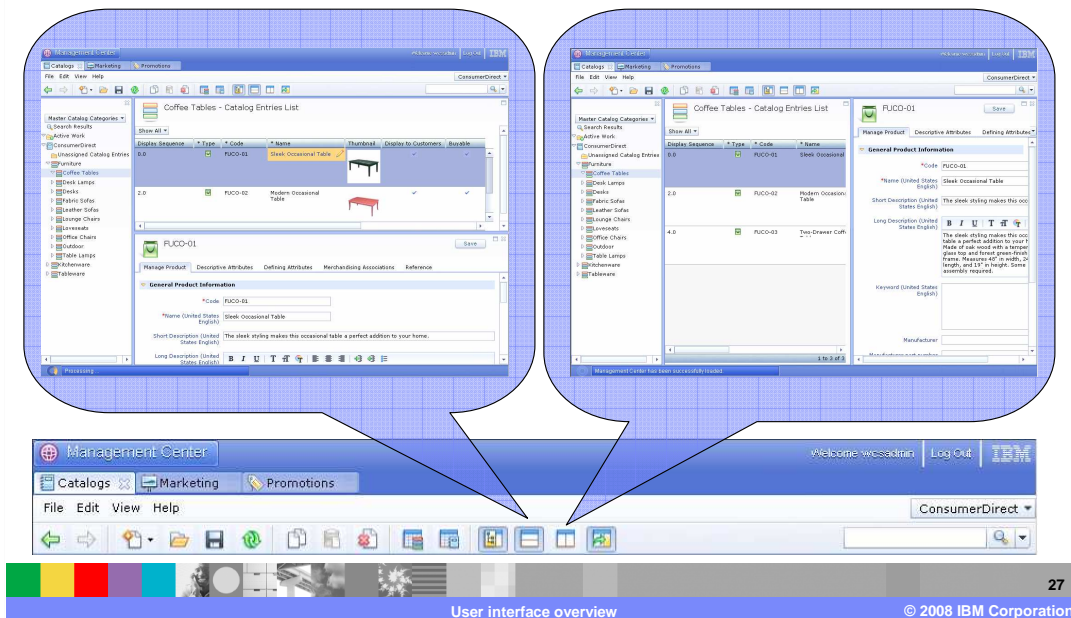
- List view
  - ▶ Click on a catalog category to bring up the list of entries in the main working area.
- Properties view
  - ▶ From the list view, select an entry.
  - ▶ Click on the entry or right-click and select open to show the properties view.
- Calendar view
  - ▶ Available in Marketing and Promotions tools only to view assets



The Management Center work area can display a list of items, or a properties page to work with details for individual items, or you can see campaign activities in your calendar view.

## Horizontal and vertical split views

You can split horizontally or vertically any of the three views: list, properties, and calendar



User interface overview

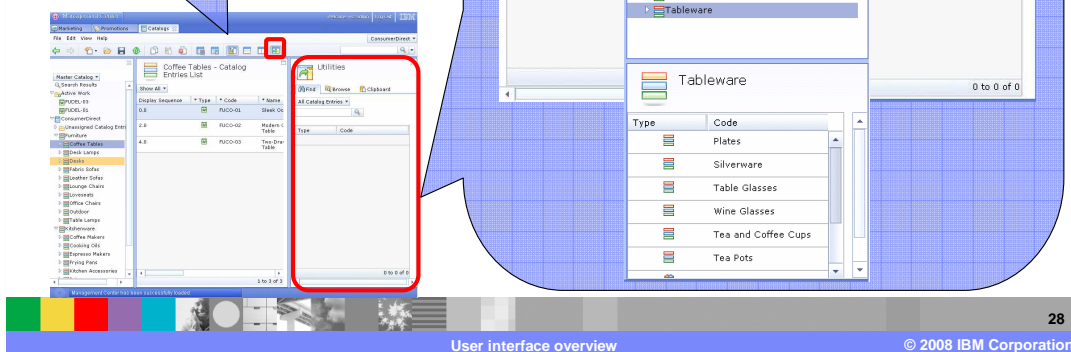
© 2008 IBM Corporation

This feature allows you to see your work items and your work space in one view. You can split horizontally or vertically any of the three views.

## Utilities view

- Use the utilities view to locate objects you require to complete a task, without navigating away from the current view
- From the Find, Browse, or Clipboard tabs, drag objects into the Management Center main work area across tools

Use icon to toggle between hide and show the utilities view



The last icon in the tool bar serves as a toggle to display or hide the Utilities view. The view has three tabs: Find, Browse, and Clipboard. Use the utilities view to locate objects required to complete a task, without navigating away from the current view. From the Find, Browse, or Clipboard tabs, drag objects into the Management Center main work area.

Click the find tab to search for objects. From the search filter, select a type of object.

Within the find area, type a search string and click the icon. If you are using the Catalogs tool, optionally, for a more refined search, from the same list where you selected the object type, select Advanced Search to open the Advanced Search dialog.

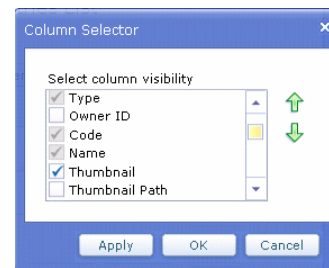
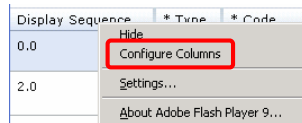
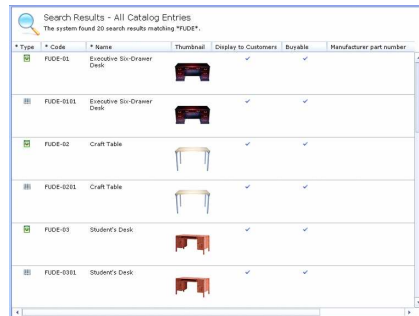
The search results display within the Find tab. You can drag objects from this list to the Management Center main work area.

Click the browser tab to browse the Commerce system for objects. You can expand and collapse the nodes in the file system to see the objects under each node. Select a node to display its details in the lower frame within the Browse tab. You can drag objects from the lower frame to the Management Center main work area.

Reuse objects that you have copied into the Clipboard tab. Drag items to the clipboard. For example, from the list view within the Management Center main work area, you can drag list items to the clipboard. Likewise, from the explorer view, drag items to the clipboard.

## Configuring table columns

- Configure list view table columns to suit your needs
  - ▶ Applicable to current session
  - ▶ Sort, show, hide columns
- Reorder columns
  - ▶ Drag and drop
  - ▶ Right click column heading
- Show columns
- Hide columns



There are two ways to change the default order of columns. You can drag any column heading to the position you want within the list view. Or you can right-click any column heading in the list view and select Configure Columns to display the column selector dialog. Once in the column selector dialog, highlight a column name and click the up arrow to move the column ahead of other columns, or click the down arrow to move the column after other columns. Use these arrow icons to sort all columns in the way you want. Once complete, click Apply and then OK

To show a hidden column, right-click any column heading in the list view and select Configure Columns to display the column selector dialog. For column headings you want to show, check the column heading names from the list within the dialog.

There are two ways to hide columns. Right-click the column heading and select column selector. Note that this option is not available if the column is a required column (indicated with an asterisk next to the column heading). Right-click any column heading in the list view and select Configure Columns to display the Column Selector dialog. For column headings you want to hide, clear the column heading names from the list within the dialog. Note that you cannot hide a column that is a required column.

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