IBM WebSphere Portal: Cooperative portlet integration with Collaboration Center.

The following exercise will outline the highly innovative Click 2 Action feature in Websphere Portal, and how it can be used with Websphere Portal Application Integrator to deliver a highly integrated solution that ties Domino applications with Collaboration Center and people finder.

From the desktop, launch a Browser session:

- Using the links toolbar in Internet Explorer, navigate to the All Sales Lead view in our application.

Our company has been using a very sophisticated CRM (Customer Relationship management) application powered by Lotus Domino for the past couple of years.
This view will show us all the active Sales leads our company is working on. For every sales lead the application will show, among other things, the sales rep and the tech sales specialist assigned to the account.

Our company has just rolled out a new Portal based on Websphere Portal 5.0.2 Extend. Your goal will be to integrate this mission critical application into the company's Corporate Portal.

- Using the links toolbar, navigate to "IBM Websphere Portal".
- Click on Login, use wpsadmin (password: wpsadmin).
- Navigate to the "ebu 2004" page. You should see by default a page called "Portlet Builder". We will be using the Domino Portlet Builder to integrate our Domino based CRM application into Websphere Portal.
- Select "New portlet"
- Use "Sales Leads" as Portlet Name, and "PortalV5" as Domino Server Name.
- Click on "Connect to Server", a list of Databases located on the server will then be displayed in the dialog box underneath the button.
- Navigate down the list of Available Databases until you find "test.nsf". At this point select "Retrieve forms and views".
- Select the "All" view, and click on Next.
- On the next screen click on the pencil icon ✎ next to the "all" view.

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- The first five fields should already be selected. Select "Sales Rep" and "Tech Sales" in the Person Field Column.

At this point we need to further customize the "Sales Rep" Field in order to enable the integration of our CRM application with People Finder. The goal being to enable users to lookup information about sales rep right from within the CRM Portlet.

- Click on the pencil icon next to the Sales Rep Field.
- On the next screen click on the "Click-to-Action" twisty ⊞ to expand the options related to Click to Action.

You need to provide the following values:

Type: PersonNameType
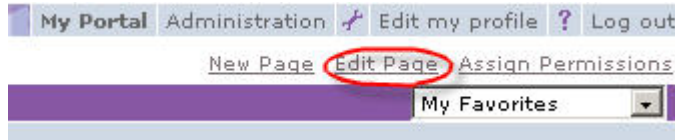**Namespace**: http://www.ibm.com/wps/c2a/annapolis/PeopleFinder
Value: "Sales Rep"

- Click on Ok.
- Click on Next
- Then Click on Finish, and finally on Ok. You should now see Sales Leads under the Portlet Name

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The Portlet is now finalized and ready to be added to a Portal page.

- Navigate to the "People Finder" page.
- Click on the "Edit Page" link

- Click on "Add portlets"
- Search for "Sales"
- From the search result, select "Sales lead"
- Select "Ok" and then "Done"

We can now use our CRM application right from within Websphere Portal. You should notice that right next to the sales rep is a "Down Arrow icon". You can use it to lookup information about specific Sales rep via the PeopleFinder feature. In effect we have just seamlessly integrated our CRM Application with the Collaboration center.