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Mashup Web Parts User Guide

Contents

Introduction ................................................................................................................................. 4
Creating a Web Part Page ........................................................................................................ 4
Adding a Mashup Web Part to the Web Part Page .............................................................. 5
  Selecting a Mashup from the Mashup Server .................................................................... 7
  Updating Input Parameters ............................................................................................... 8
Mashup Web Part Toolbar .................................................................................................. 9
  Log Out ............................................................................................................................. 10
  Publish Mashup ............................................................................................................... 10
  Clear Mashup .................................................................................................................. 11
  Publish to List ................................................................................................................... 11
Modify Web Part Settings .................................................................................................. 12
  JackBe UI Settings .......................................................................................................... 12
    Enable Rapid Display .................................................................................................... 13
    Override Web Part Title ............................................................................................... 13
  Presto Mashup Properties ............................................................................................... 14
    Mashup Server ............................................................................................................... 15
    Override Presto Instance .............................................................................................. 15
    Mashup ID (applies to advanced users or developers only) ........................................ 16
    Mashup Inputs ............................................................................................................... 16
    Mashup Columns .......................................................................................................... 16
Registering a List as a Presto Mashable ............................................................................. 16
Introduction

Mashups enable your mashup sites to display dynamic, real-time, integrated data specifically relevant to your organization or other parties such as your customers. As part of your mashup sites, Web Part Pages allow you to construct dashboards that give users a coherent and multi-faceted source of information. Including mashups in dashboards is a powerful way to gather relevant data for research and analysis. Publishing mashups as Web Parts allows you to use mashup data on a Web Part Page in an easily readable table format, similar to a list view.

In addition to using mashups in SharePoint dashboards, you can also register SharePoint Lists as mashable information sources in Presto to use as information in mashups or Apps.

Creating a Web Part Page

The layout and content of a page are more or less customizable, depending on the layout you select. A page is composed of one or more Web Parts including Apps, mashups, and other information from inside and outside of SharePoint.

Steps:

- To create a Web Part Page, go to the Site Actions menu and choose Create.

- Under Web Pages, on the right side, select Web Part Page.

- Name your Web Part Page and set the Overwrite option if this name should overwrite an existing file with the same name in the document library. This is the file name that appears in headings and links throughout the site.
Select a layout from the **Choose a Layout Template** list. A preview of the selected layout appears to the left.

Choose the document library where you want the Web Part Page to be saved.

Click **Create**. The title of your Web Part Page appears in the top left corner and the layout you select displays with zones where you can insert Web Parts. This is the **Edit Mode** view.

At any time in the Edit Mode view, you may select **Edit Title Bar Properties** to change the title or add a caption, description, or image. Enter the information in the appropriate fields and click **Apply**.

**Adding a Mashup Web Part to the Web Part Page**

In order to publish mashups to your mashup site Web Part Pages, you must add one or more Mashup Web Parts to a Web Part Page, which displays data from the mashup in table format.
Once your page is in Edit Mode, you may add Mashup Web Parts to your page. You can also move Web Parts around within the template and modify Web Part properties.

**Steps:**

Click **Add a Web Part** in the section where you would like your Mashup Web Part to appear. The Add Web Parts – Webpage Dialog menu appears.

- Scroll down and select the checkbox for **Mashup Web Part** under JackBe Presto Mashup Sites for SharePoint.
- Click **Add** at the bottom right corner of the menu.

- You may add as many Web Parts as you wish by repeating the previous three steps.
- In Edit Mode, you may click on the small **Edit** drop-down menu that appears once a Web Part is added to perform the following functions:
● **Minimize** causes only the Web Part’s chrome to be visible.

● **Close** hides the Mashup Web Part you’ve added, though it is still present in the Web Part Page.

● **Delete** deletes the Mashup Web Part from this Web Part zone.

● **Modify Shared Web Part** allows you to modify the properties of your Web Part, including appearance, layout, and other advanced settings. *For instructions on modifying Mashup Web Parts, see “JackBe Web Part Properties” below.*

● **Export** allows you to save the Web Part in XML format.

  ▶ In Edit Mode, you may also select and drag Web Parts to move them to various Web Part zones.

  ▶ Once you are finished adding and modifying Web Parts, click **Exit Edit Mode** in the top right corner.

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**Selecting a Mashup from the Mashup Server**

Once you’ve left Edit Mode, you can select a specific mashup to publish with your Mashup Web Part from the Mashup Gallery.

**Steps:**

  ▶ Click Publish Mashup.
The Mashup Gallery appears. If prompted, enter credentials to log in to various Mashup Servers. Or choose **Skip** to continue without logging in to a Mashup Server. Mashups from the Mashup Servers that you skip will not be listed.

**Note:** do not include the Windows domain in your username, such as mydomain\myname, when you log in. The Mashup Server does not accept domain names. You may also need to change add Mashup Servers to your browser’s list of trusted domains or your cookie preferences to allow session cookies. If you still receive login errors, check with your Presto administrator.

The list of mashups in the Mashup Gallery is cached and refreshes on a set time interval. To manually update the list of mashups, click **Refresh**.

- Find and select a mashup. Then click **Ok**.

To find a mashup easily, you can filter the list of mashups by category or by provider. Or search for a mashup by name, tag or description.

### Updating Input Parameters

Input parameters allow mashups to produce information that is tailored to your specific needs. The output of the mashup is dependent upon the input parameters. For example, a Yahoo! map mashup requires location input parameters in the form of street, city, state, and zip code. Input parameters may belong to underlying services, or they can determine how to filter information or how to sort it, among many other functions.

Input parameters enable you to make mashups more dynamic, allowing you to control what information is retrieved and how that information is obtained or transformed. Not all mashups have input parameters, and not all input parameters are required. If a mashup does have input parameters, fields in the Mashup Gallery show these values.

You may edit the mashup input parameters here in order to make the mashup data fit within the specific context of your Web Part Page. For instance, if your Web Part Page is intended for a
particular department within a company, you may update the input parameters here to include only data relevant to that department.

Note: You can also edit input parameters through the Modify Shared Web Part option in the drop-down menu on the right of the screen. See "JackBe Web Part Properties" below.

Steps:

- Enter your desired values for the input parameters in the text field(s).
- Click Ok.

Mashup Web Part Toolbar

This section discusses the various operations you can perform in the Mashup Web Part Toolbar. The toolbar is only visible if you have permission to edit a Web Part Page. Once a Mashup Web Part is added to the Web Part Page, you can hide or show the Mashup Web Part Toolbar using the Site Actions menu shown below.
Toolbar options change depending on the overall function being performed. For instance, before a mashup is selected, only \textit{Select Mashup} appears on the toolbar. Once mashups have been selected, \textit{Log out, Publish Mashup, Clear Mashup, and Publish to List} appear in the Mashup Web Part Toolbar.

**Log Out**

\textbf{Log Out} ends your session with a specific Mashup Server and allows you to subsequently log in to that same Mashup Server using different credentials. You will also need to log out if your Mashup Server credentials change so that you can log back in with your updated credentials.

**Steps:**

- Click \textbf{Log Out} in the Web Part Properties Toolbar.
- Enter the Mashup Server Username and Password in the appropriate text boxes.
  
  \textbf{Note: do not} include the Windows domain in your username, such as mydomain\myname, when you log in. The Mashup Server does not accept domain names. You may also need to add Mashup Servers to your browser’s list of trusted domains or change your cookie preferences to allow session cookies. If you still receive login errors, check with your Presto administrator.
- Click \textbf{Log In}.

**Publish Mashup**

\textbf{Publish Mashup} opens the Mashup Gallery so you can select a new mashup to publish or change the currently selected mashup. The Mashup Gallery opens with the mashups currently available in the specified Mashup Servers. Inactive mashups are not included.
Steps:
- Click **Publish Mashup** in the Web Part Properties Toolbar. The Mashup Gallery opens.
- Select the mashup you wish to add to your Web Part.
- Click **Ok**.
- If needed, click **Refresh** to manually refresh the mashups that appear in the Mashup Gallery.

**Clear Mashup**

Clear Mashup clears the mashup currently selected for the Mashup Web Part. You can then click **Select Mashup** to open the Mashup Gallery and choose another mashup to publish using the Web Part.

**Steps:**
- Click **Clear Mashup** on the Web Part Properties Toolbar.

**Publish to List**

Publish to List creates a SharePoint list in the current site containing the same number columns and data rows as in the current view of the mashup. This creates a view, named "Presto," of the new SharePoint list. The list title matches the mashup's title. If the list title already exists in the current site, a Date/Time stamp is added to distinguish the two. Essentially, Publish to List takes a snapshot of the current view of mashup data, creates a new SharePoint list, and displays the same view of the Mashup Web Part in SharePoint.

**Steps:**
- Click **Publish to List** in the Web Part Properties Toolbar. A SharePoint list appears.
Modify Web Part Settings

Modifying Web Part settings allows you to make changes in appearance, layout, and advanced settings of the Web Part. For Mashup Web Parts, two additional categories appear in the Web Part properties task pane: JackBe UI Settings and Presto Mashup, discussed below. Changes you make to the Web Part properties are visible to anyone viewing the published Web Part Page.

Steps:
- Scroll right and click on the down arrow on the top right of the Mashup Web Part.
- Select Modify Shared Web Part. This will put you in Edit Mode and will open the Web Part properties task pane.

JackBe UI Settings

The JackBe UI Settings category allows you to control the mashup display settings. There are two settings that may be changed: Enable Rapid Display, which is not checked by default, and Override Web Part Title, which is checked by default.

Steps:
- Scroll down to JackBe UI Settings.
- Click the box to expand the JackBe UI Settings category.
Enable Rapid Display

Enable Rapid Display enables caching for mashup data and allows your Web Part Page to load more quickly by cutting back on the time required to request the data from the Mashup Server every time you view the page. However, this can mean that the data displayed won't be real-time data. With caching enabled, mashup data is not updated until your current session expires. You can also refresh mashup data manually with the Refresh button that appears on the Mashup Web Part Toolbar.

Steps:

- Click Enable Rapid Display under JackBe UI Settings in the Web Part properties task pane to turn the feature on.
  - Click Ok or Apply.
- Click Refresh to manually refresh data.

Override Web Part Title

By default, the Override Web Part Title checkbox is checked. With this option set, the Web Part title is "Mashup: [Mashup Title]." Clearing this option allows you to enter your own title for the mashup to something that is more appropriate for the mashup data in your Web Part Page.

Steps:

- Uncheck Override Web Part Title.
- Scroll up in the Web Part properties task pane.
- Expand Appearance category.
Enter the new title in the Title text box.

Click **Ok** or **Apply**.

**Presto Mashup Properties**

This category allows you to update mashup properties. Presto host, Presto version, and SSO application name are included by default according to the Mashup Server selected. You can change these properties to access mashups hosted in a Mashup Server that has not been added to SharePoint, for example, or to change the SSO application name to use other credentials for this Mashup Server.

You can also update the mashup ID, mashup input parameters, or mashup columns previously chosen when the mashup was selected from the Mashup Gallery.
Mashup Server

This section lists all of the available Mashup Servers that are visible from the current site. If a Mashup Server is selected, the Web Part has the following properties set: the Presto URL, the Presto version, whether or not MOSS SSO is enabled, and the SSO application ID when relevant, as well as the option for cookie forwarding.

*Note:* MOSS SSO is SharePoint's single sign on implementation, which enables users to automatically log in to multiple Mashup Servers without having to sign in to each.

Override Presto Instance

By default, this box is not checked. Check it to manually enter the URL for the Mashup Server, the Presto version, and the SSO application ID.

**Presto Host**

Change this property if the location for a Mashup Server has changed or if you want to point to a new Mashup Server.

- Enter the URL of the Mashup Server here. For example: http://<mashupserverurl>:8080

**Presto Version**

You can manually update the Presto version if the Mashup Server that automatically populates this text box is not correct, for instance if the version of the Mashup Server is older or newer than the version in the text box.

- Enter the correct Presto version here. For example: 2.7 or 3.0
**SSO Application Name**
MOSS SSO applications are configured by the SharePoint farm administrator. Enter an SSO application name here to enable SSO support when connecting to this Mashup Server. If SSO is not enabled, you and other users of the published page must enter Presto credentials when viewing the Mashup Web Part.

- Enter the SSO application name here.

**Mashup ID (applies to advanced users or developers only)**
Change the mashup ID to change which mashup is displayed in the Web Part. This ID must exist in the Mashup Server selected in the drop-down above or by the override settings.

**Mashup Inputs**
If the mashup has input parameters, you may update them here. See "Updating Input Parameters" above.

**Mashup Columns**
Select the mashup data you would like the Web Part to display. See "Selecting Columns to Display in the Web Part" above.

**Registering a List as a Presto Mashable**
You can use information from SharePoint Lists in Presto mashups or Apps by registering Lists as a "mashable information source." To register a List in Presto:

- Open a list and click **Actions**.
- Select **Register List**.
- If desired, change the **Name** or **Description** to assign to the Presto mashable. The name defaults to the List title.
- If this List has views, choose the specific view you want to use for this Presto mashable.
- In **Publish To**, select the Mashup Server where you want to register this List.
- If needed, provide the username and password to log into this Mashup Server. These credentials become the owner in Presto for the new mashable.
- Click **Submit** to register the List as a mashable.