



Highlights

April 2015

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Introduction

This section includes:

- **Purpose of This Document** on page 3
- **Product Interoperability Matrix** on page 4
- **Primo Documentation** on page 4

Purpose of This Document

This document summarizes the various enhancements and changes that are new for the April 2015 release of Primo. These updates are described under the following sections:

- **New User Experience Functionality** – The updates to the Front End include the following main enhancements:
 - Added the ability to export records to EasyBib from the Actions menu in the Front End.
 - Added the ability to configure a Featured Results bar that displays within the search results.
 - Modified the date slider in the Front End to refine results based on the search/creationdate PNX field instead of the facets/creationdate PNX field.
 - Added a RESTful API to access e-shelf functionality.
 - Added the ability to configure redirection URLs per DNS at the institution level.
- **New Administration Tools Functionality** – The updates to the Back Office include the following main enhancements:
 - Moved Primo Online Help to Documentation Center and utilized HTML5 output for device optimization.
 - Added the ability to configure email contact information for multiple contacts at the institution level.

- Enabled the configuration of deep search plugins in the Back Office.
- Added the ability to copy normalization rules from the active normalization rules set to another normalization rules set.
- Added the ability to configure the date format at the institution level.
- Added the ability to configure the Real-time Availability (using normalization rules) mapping table at the institution level.
- **New Security Functionality** – The updates to security in Primo environments include the following main enhancements:
 - Ensures that all hosted Primo environments support SSL in the Front End and Back Office
 - Evaluate vulnerability and block any XSS vulnerability.

Product Interoperability Matrix

The following table lists the minimum version that is needed for other Primo products to support some of the new features in Primo version 4.0 and later releases.

Table 1. Product Interoperability

Product	Version
Aleph (to allow OvP)	Aleph 18 with the April 2010 service pack (SP), Aleph 20.1 with the February 2010 SP, Aleph 22 (photocopy requests)
Voyager (to allow OvP)	Voyager 7.2 with the April SP (7.2.1)
MetaLib (to allow Find Database)	4.3.3
SFX	March 2010 revision

Primo Documentation

The following is a list of the primary documentation for Primo version 4 and later releases:

- *Primo Back Office Guide*
- *Primo System Administration Guide*
- *Primo Technical Guide*

■ *Primo Interoperability Guide*

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New User Experience Functionality

This section includes:

- **Export to EasyBib (April 2015)** on page 7
- **Featured Results Bar (April 2015)** on page 9
- **Date Slider Enhancements (April 2015)** on page 14
- **Primo e-Shelf RESTful API (April 2015)** on page 15
- **Front End Redirection Configuration (April 2015)** on page 16

Export to EasyBib (April 2015)

Purpose of Enhancement

This enhancement allows users to export information from Primo results to the EasyBib application to create citations.

Description

The ability to export titles found in Primo to EasyBib has been added to the following places in the Front End:

- Full Display of a title – The **EasyBib** action has been added to the **Actions** drop-down list (which was previously named **Send to**). This action opens the EasyBib service and populates the fields necessary to create a citation for a title.

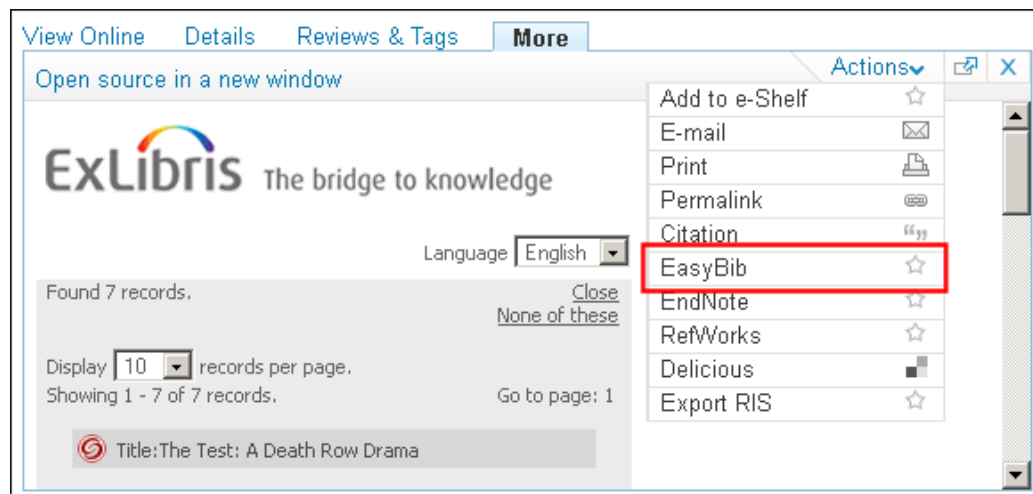


Figure 1: EasyBib Action in Actions Drop-Down List in Results

- e-Shelf – The **Push to EasyBib** save option has been added to the Actions menu in the user's e-Shelf. This action opens the EasyBib service and populates the fields necessary to create citations for the selected titles in the user's e-shelf.

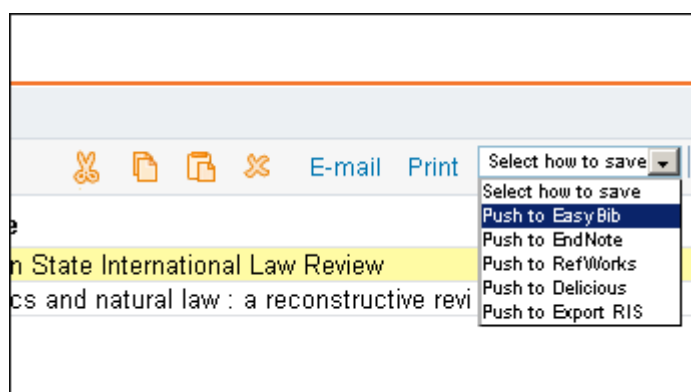


Figure 2: Push to EasyBib Option from e-Shelf

Back Office Configuration

The following codes have been added to the Keeping this Item Tile code table to customize the labels associated with this enhancement:

Table 2. Keeping this Item Tile Code Table

Code	Description
default.fullldisplay.command.pushto.option.EasyBib	Defines the label that appears in the Actions menu. The following value is defined out of the box: EasyBib.
default.fullldisplay.command.pushto.option.eshelf.EasyBib	Defines the label that appears in the Select how to save menu in the e-Shelf. The following value is defined out of the box: EasyBib.
link.title.commands.tile.accessibility.pushto.EasyBib	Defines the label that appears in the e-Shelf if JavaScript is disabled in the browser. The following value is defined out of the box: Save record to EasyBib (opens in a new window)

If you want to hide the new option in the Actions menu in the results, add **display: none** to the following line in your view's CSS file, as follows:

```
.EXLTabHeaderButtons ol.EXLTabHeaderButtonSendToList  
li.EXLButtonSendToEasyBib {display: none;}
```

Featured Results Bar (April 2015)

Purpose of Enhancement

The enhancement enables you to include results from a specified search scope along with the users' search results to highlight additional results from a search scope, which may or may not be the same search scope used in the original search. This can be seen as a type of an advertisement to notify users that other types of material may be relevant to their searches. For example, a Featured Results bar can be configured to display the following:

- Primo Central results in a tab that only returns local data
- Images to highlight images
- A special collection

Description

When a Featured Result bar is defined for a tab, Primo will perform two queries when users perform searches:

- **Original query** – This query uses the search terms, scope, and material type (if this prefilter is selected) that the user enters to return the results set.
- **Featured results query** – This query uses the same search terms used in the original query, but the scope and material type are taken from the Featured Results mapping table (see [The Featured Results Mapping Table](#) on page 11). If this query returns enough results, Primo displays the additional results in one of the following formats in a dedicated bar that displays within the results of the original query:
 - **Thumbnails** (if at least four records are found in the featured results query)

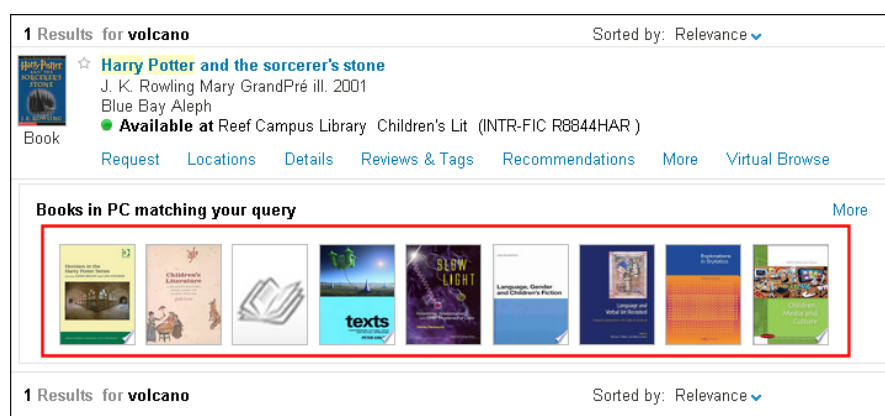


Figure 3: Thumbnail Format

- **List** (if at least two records are found in the featured results query)

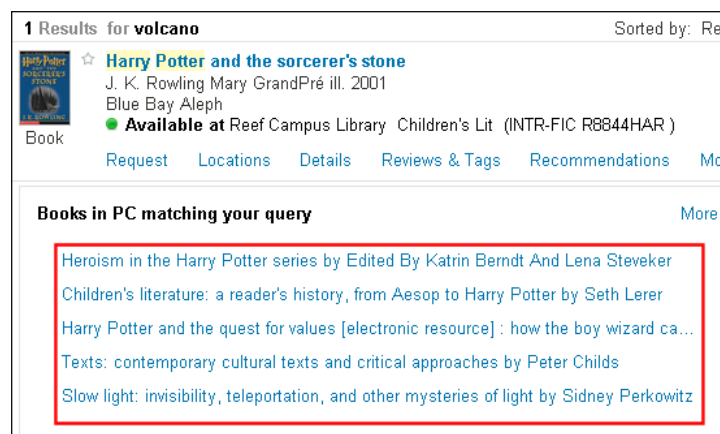


Figure 4: List Format

The Featured Results bar appears after the fourth record in the results set. Within the bar, the most highly ranked results appear first.

Users can perform the following actions on the featured results:

- View the full display of the record by clicking the title.
- Display the complete results set for the featured results query by clicking the **More** link.

NOTES:

- The Featured Results bar appears only for the initial query and on the first page. It will not display after selecting a facet or navigating to another page.
 - If the original query does not return any results, Featured Results bar will not display.
-

Back Office Configuration

The following tables were added to the Back Office:

- Featured Results mapping table
- Featured Results Labels code table

The Featured Results Mapping Table

The Featured Results mapping table under the Front End subsystem allows you to configure the display of featured results per view and search scope at the institution level.

The screenshot shows the 'Mapping Tables' configuration page. At the top, there are dropdowns for 'Update for Owner' (Volcano Island University), 'Sub System' (Front End), and 'Table Name' (Featured Results). Below these is a 'Search in Table' input field and a 'Delete' button. The main section is titled 'Mapping Table Rows' and contains a table with the following columns: Enabled, View & Tab*, Search Scope*, Resource Type*, More link target Tab, Format, and Title ID. The table has one row with the following values: [checked checkbox], Auto1--The Default Tab, Auto1--PC, Books, Auto1--Primo Central, List, and Auto1 Default. Below the table is a 'Table Description' field with the text 'Featured Results configuration'. At the bottom, there is a link 'Create a New Mapping Row'.

Enabled	View & Tab*	Search Scope*	Resource Type*	More link target Tab	Format	Title ID
<input checked="" type="checkbox"/>	Auto1--The Default Tab	Auto1--PC	Books	Auto1--Primo Central	List	Auto1 Default

Figure 5: Featured Results Mapping Table

To create a Featured Results bar, specify the following fields:

- **View & Tab** – Specify the view and tab in which the Featured Results bar appears.

NOTE:

There is a limit of one Featured Result bar per tab.

- **Search Scope** - Specify the target search scope of the featured results. The target search scope must belong to the same view that is defined in the View & Tab field.

NOTE:

Because of performance issues, you cannot include MetaLib quickSets in featured results.

- **Resource type** – If appropriate, specify the type of resource (which is defined in the Basic Media Type mapping table) to which to limit the featured results list. The system uses the Prefilter facet as the basis for the featured results list.
- **More Link Target Tab** – Specify the view and tab in which the additional search results will appear if the user invokes the More link. The target search scope must be defined in this tab, and the view must be the same view that is defined in the View & Tab field.
- **Format** – Specify one of the following display formats for the featured results:
 - **Thumbnails** – Displays the results as thumbnails. This format is ideal for images or results that are likely to have cover page images. Up to 10 records can display in this format.
 - **List** – Displays the results as a list of titles. Up to 5 records can display in this format.
- **Title ID** – Specify an alphanumeric ID to identify this Featured Results bar in the Featured Results Labels code table, which allows you to override the title that displays for the bar in the Front End. For more information, see [Featured Results Labels Code Table](#) on page 12. A title ID is required even if you do not want a dedicated title for the Featured Results bar.

After making changes deploy from the mapping table page or specify the **All Code Tables and Mapping Tables (Front End labels and more)** option on the Deploy All page.

Featured Results Labels Code Table

The Featured Results Labels code table under the Front End subsystem allows you to configure the labels that display in each Featured Results bar.

Code Tables

Update for Owner: Volcano Island University

Sub System: Front End

Table Name: Featured Results Labels

Search in Table:

Code Table Rows

Enabled	Link Code ▲▼	Label ▲▼	Language ▲▼	Display Order	Default Value
<input checked="" type="checkbox"/>	default.featuredresults.labels.By	by	en_US	3	<input type="checkbox"/>
<input checked="" type="checkbox"/>	default.featuredresults.labels.searchfor	Search for	en_US	2	<input type="checkbox"/>
<input checked="" type="checkbox"/>	default.featuredresults.labels.in	in	en_US	0	<input type="checkbox"/>
<input checked="" type="checkbox"/>	default.featuredresults.labels.matching	matching your query	en_US	1	<input type="checkbox"/>
<input checked="" type="checkbox"/>	default.featuredresults.labels.more	More	en_US	4	<input type="checkbox"/>

Table Description: Codes for labels of featured results

Figure 6: Featured Results Labels Code Table

This table includes the following out-of-the-box codes:

Table 3. Featured Results Labels Code Table Values

Code	Description
default.featuredresults.labels.By	Defines a component of the items presented in the List format, which appears in the following format <i><title> by <author></i>
default.featuredresults.labels.in	Defines a component of the default title, which appears in the following format: <i><resource type> in <search scope> matching your query</i>
default.featuredresults.labels.matching	Defines a component of the default title, which appears in the following format: <i><resource type> in <search scope> matching your query</i>
default.featuredresults.labels.more	Defines the label for the More link. The following value is provided out of the box: More

If you want to create a dedicated label for a Featured Results bar, add the following code to override the `default.featuredresults.labels.matching` and `default.featuredresults.labels.in` codes for the specified `<title ID>`:

```
<View ID>.featuredresults.<title id>
```

or

```
default.featuredresults.<title id>
```

For example:

```
Auto1.featuredresults.Auto1PC    Articles you may be interested in:
```

After making any changes to the table, deploy from the code table page or specify the **All Code Tables and Mapping Tables (Front End labels and more)** option on the Deploy All page.

If you do not define a specific label for the Featured Results bar, the system will default to the out-of-the-box title, which is created from the following elements:

```
<Resource type from Basic Media type> in <Search Scope  
description> matching your query
```

Date Slider Enhancements (April 2015)

Purpose of Enhancement

This enhancement improves the refinement of the Creation Date facet slider, which previously refined the results by the following date ranges per year.

- **0 through 1499 –**
Includes ranges of 500 years. Dates were normalized upward to the next half millennium. For example, a date of 523 was normalized to 1000.
- **1500 through 1899 –**
Includes ranges of 100 years. Dates were normalized upward to the next century. For example, a date of 1632 was normalized to 1700.
- **1900 through 1949 –**
Includes ranges of 10 years. Dates were normalized upward to the next decade. For example, a date of 1924 was normalized to 1930.
- **After 1950 –**
No normalization was performed.

Refinement using the date slider will now use the creation date from the search/creationdate field in the PNX records instead of the normalized date ranges listed above to provide a more precise refinement.

Refine My Results

Topic
270700 Ecology And Evolution (1)
Church of England (1)
Decision-making, Group (1)
Department of Environmental Biology (1)
England (7)
[More options](#) ▼

Creation Date
From To [Refine](#)

1974 2009

Figure 7: Creation Date Slider

NOTE:

The initial date ranges displayed in the date slider are still based on the ranges in the creation date facet (facets/creationdate).

Out of the box, the Creation Date facet ranges are hidden, but you may show them by modifying the CSS.

Back Office Configuration

No Back Office configuration is necessary for this enhancement.

Primo e-Shelf RESTful API (April 2015)

Purpose of Enhancement

This enhancement allows you to access e-Shelf functionality using a RESTful Web service that returns the results in JSON format.

Description

The e-Shelf functionality includes the following:

- Get e-Shelf – Retrieve a user’s entire e-Shelf or a specific folder
- Add, Delete, or Update a folder (including the basket)

- Add, Delete, or Update records within the e-Shelf

Documentation

For complete details on this API, refer to the Developer Network:

<https://developers.exlibrisgroup.com/primo/apis/webservices/rest>

Front End Redirection Configuration (April 2015)

Purpose of Enhancement

This enhancement enables you to define Front End redirection URLs per DNS at the institution level. Previously, this was often done in the `re-direct.jsp` file, which was overwritten during the installation of service packs. The assumption is that multi-institution environments have a different DNS per institution.

Description

The Front End Redirect Definitions mapping table has been added to allow to add re-direction definitions at the institution level.

The screenshot shows a web interface for configuring the 'Front-End Redirect Definitions' mapping table. At the top, there's a 'Mapping Tables' header with a 'Delete' button. Below this, a form allows updating the owner to 'Volcano Island University', the sub-system to 'Front End', and the table name to 'Front-End Redirect Definitions'. The main section, 'Mapping Table Rows', contains a table with columns: 'Enabled', 'DNS*', 'Redirect URL*', 'Description', and 'Last Updated'. One row is visible with a checked 'Enabled' box, the DNS 'il-primo17.myInst.com', the Redirect URL 'primo_library/libweb/action/search.do?vid=Auto1', and a timestamp '03/23/15 By Admin'. At the bottom, there's a 'Table Description' field with the text 'Front-End Redirect Definitions'.

Enabled	DNS*	Redirect URL*	Description	Last Updated
<input checked="" type="checkbox"/>	il-primo17.myInst.com	primo_library/libweb/action/search.do?vid=Auto1		03/23/15 By Admin

Figure 8: Front End Redirect Definitions Mapping Table

This table includes the following required fields:

- **DNS** – Specify the DNS. For example: `il-primo17.myhost.com`.
- **Redirect URL** – Specify the redirection URL for the DNS. For example, `primo_library/libweb/action/search.do?vid=Auto1`.

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New Administration Tools Functionality

This section includes:

- **Primo Online Help Enhancements (April 2015)** on page 17
- **Email Notifications Per Institution (April 2015)** on page 17
- **Deep Search Plugin Configuration (April 2015)** on page 19
- **Copy Normalization Rule (April 2015)** on page 21
- **Back Office Date Format at Institution Level (April 2015)** on page 22
- **Real-Time Availability (Using Normalization Rules) at the Institution Level (April 2015)** on page 22

Primo Online Help Enhancements (April 2015)

Purpose of Enhancement

The online help for the Primo Back Office has been moved from your local Primo server to the Customer Center. This will allow the documentation to receive updates between releases. The manner in which the help is accessed will not change, but the new system will utilize HTML5 to allow optimized output for different types of devices.

Email Notifications Per Institution (April 2015)

Purpose of Enhancement

This enhancement allows multitenant environments to send email notifications for pipe and Front End processes to staff users per institution. Previously, these messages were sent to a single contact.

This enhancement allows you to configure at the institution level who receives the following:

- Email notifications for pipe processes
- Email inquiries from end users if a Front End failure occurs

In addition, it is now possible to configure multiple contacts.

Description

In previous releases, the contact information was defined only at the installation level using the Contact Person E-Mail parameter in the General Configuration Wizard. The E-mail Addresses mapping table has been added to allow the configuration of a list of email addresses per notification type (Pipe or Front End process) at either the installation or institution level.

The screenshot shows the 'Primo Home > Advanced Configuration > All Mapping Tables' interface. It features a navigation bar with tabs: Home, Deploy & Utilities, General, Local Data, Publishing, FE & Delivery, and Search Engine. Below the navigation bar is a section titled 'Mapping Tables'. This section includes filters for 'Update for Owner' (Reef University), 'Sub System' (Back Office), and 'Table Name' (E-mail Addresses). There is a 'Search in Table' input field and a 'Customize' button. The main area displays a table titled 'Mapping Table Rows' with columns: Enabled, Type*, Email, Description, and Last Updated. The table contains two rows: one for 'Pipe' and one for 'Front-End', both with email addresses set to 'admin@primo.com' and a last updated date of '03/05/15 By primo'. Below the table is a 'Table Description' field containing 'E-mail Addresses'.

Enabled	Type*	Email	Description	Last Updated
<input checked="" type="checkbox"/>	Pipe	admin@primo.com		03/05/15 By primo
<input checked="" type="checkbox"/>	Front-End	admin@primo.com		03/05/15 By primo

Figure 9: E-mail Addresses Mapping Table

The E-mail field allows you to specify multiple email addresses by separating them with a semicolon. For example:

Ryan_Hardy@myinst_1.edu;Joe_Carroll@myinst_2.edu

NOTE:

The upgrade will create the installation-level table by copying the email address from the General Configuration parameter.

Deep Search Plugin Configuration (April 2015)

Purpose of Enhancement

This enhancement allows you to access and configure deep search plugins in the Back Office instead of modifying the `thirdnode-config.xml` file on the server. For more information on deep search plugins, refer to the following sections:

- Configuring the EBSCO Adaptor in the *Primo Back Office Guide*
- <https://developers.exlibrisgroup.com/primo/integrations/search/deepsearch> in the Ex Libris Developer Network

Description

The following mapping tables (which can be defined at both the installation and institution levels) have been added to the Back Office to allow you to define and modify deep search plugins in the Back Office:

- **Deep-Search Plugins** – Specify the following fields to define a deep search adaptor:
 - Enabled – Indicates whether the deep search adaptor is enabled in the system.
 - Plugin ID – The name used to identify the adaptor in the system.
 - Plugin Class – Specify the class used for the adaptor.
 - Plugin Display Name – The name that displays in the Views Wizard.
 - Description – Text that describes the functionality of the adaptor.
- **Deep-Search Plugin Parameters** – Specify the following fields to define the parameters used by the deep search adaptors:
 - Enabled – Indicates whether the parameter is in use.
 - Param name – The name of the parameter.
 - Param value – The value of the parameter if encryption is not needed.
 - Param value - Encrypted – The value of the parameter if encryption is needed. Use this field to encrypt sensitive information (such as keys and passwords).
 - Plugin – The plugin ID of the adaptor that uses the parameter.
 - Description – Text that describes the functionality of the parameter.

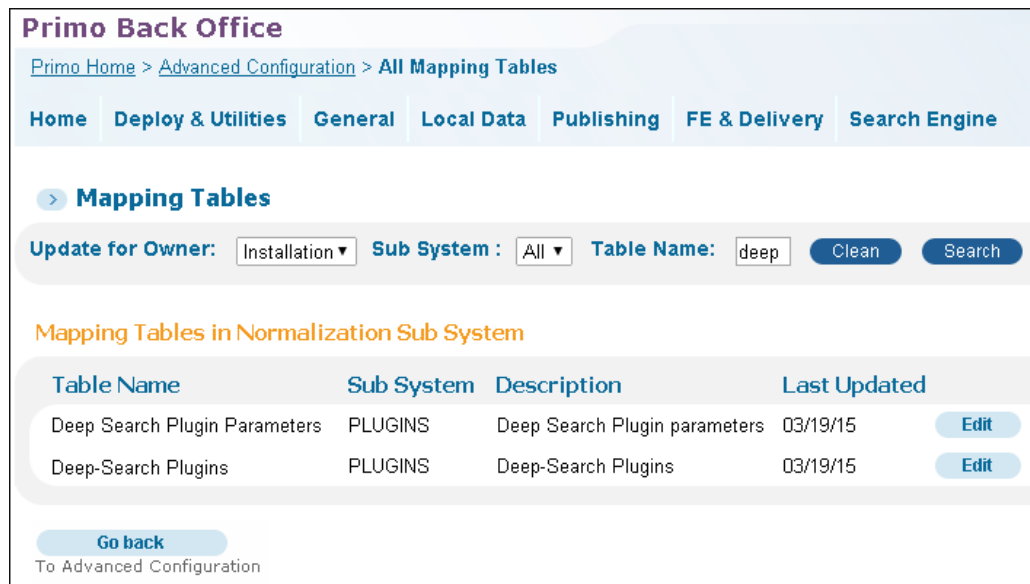


Figure 10: Deep Search Adaptor Mapping Tables

In addition, the Deep Search Configuration option has been added to the Deploy All page to deploy changes to the Front End.

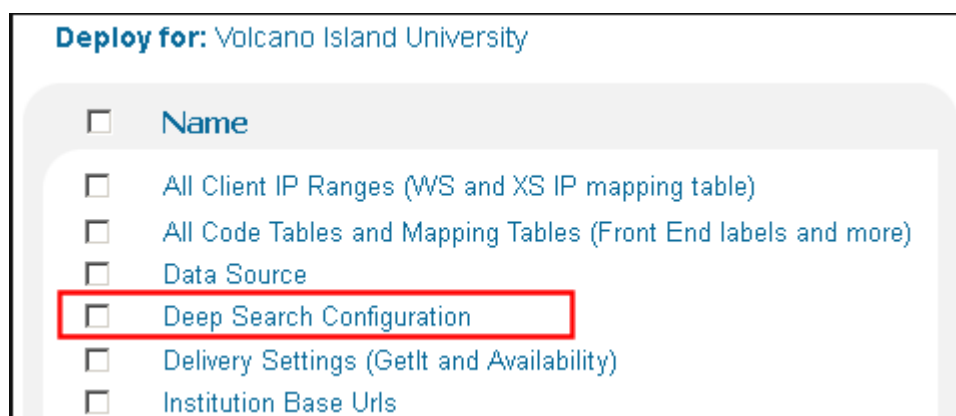


Figure 11: New Deploy All Option - Deep Search Configuration

The upgrade will move the definitions from the `thirdnode_config.xml` file to the new mapping tables. The definitions for Primo Central are now pre-defined and will not be included in the new mapping tables.

The new mapping tables will be included in the export and import Primo configuration tools.

Copy Normalization Rule (April 2015)

Purpose of Enhancement

This enhancement will allow staff users to copy all rules for a single PNX field from the active normalization rules set to another normalization rules set.

Description

The **Copy this Target to another Mapping Set** function has been added to the Advanced Normalization Rules Editor. This option is available to all users who have the following roles: Admin, Data Administrator, Pipe Operator, Normalization Rules Editor, and Staff User.

The screenshot displays the 'Advanced Normalization Set Editor' interface. At the top, there are three dropdown menus: 'Normalization Rules Set' (set to 'Voyager_nr'), 'Section' (set to 'Control'), and 'Field' (set to 'Source ID'). Below these, a line of text reads: 'Normalization Rules for field sourceid in PNX Section control in Normalization rules set Voyager_nr'. The main area contains a 'Description' field, a 'Basic' button, and links for 'Enable all rules' and 'Disable all rules'. It also shows 'Last Updated By: Admin' and 'At: 2012-12-12 10:38:03.0'. A 'Comments' text area and 'Version: 1' are at the bottom left. A red rectangular box highlights a section at the bottom with the heading 'Copy this Target to another Mapping Set'. Inside this box, there is a label 'Select a Mapping to copy to:' followed by a dropdown menu currently showing 'Aleph_nr', and a blue 'Copy' button.

Figure 12: Advanced Normalization Rules Editor

This option is available only in the Advanced Normalization Rules Editor.

When the staff user confirms the copy, the entire set of rules for the active PNX field (“target”) will be overridden. Note that there is no option to cancel the operation once it has started.

Back Office Date Format at Institution Level (April 2015)

Purpose of Enhancement

This enhancement allows you to configure the format of dates that appear in the Front End and Back Office at the institution level.

Description

The Short_Date_Format and Long_Date_Format parameters in the General Configuration Wizard have been moved to the General Configuration mapping table to allow date formats to be customized at the institution level.

Primo Home > Advanced Configuration > All Mapping Tables

Home Deploy & Utilities General Local Data Publishing FE & Delivery Search Engine

> Mapping Tables

Update for Owner: Volcano Island University Sub System: Common tables Table Name: General Configuration

Mapping Table Rows

Enabled	Parameter*	Value	Description	Last Updated
<input type="checkbox"/>	Select Value			
<input checked="" type="checkbox"/>	Short Date Format	MM/dd/yy	Short date format	03/21/15 By primo
<input checked="" type="checkbox"/>	Long Date Format	MM/dd/yy HH:mm:ss	Long date format	03/21/15 By primo

Table Description: Some general configuration parameters

Figure 13: General Configuration Mapping Table

Real-Time Availability (Using Normalization Rules) at the Institution Level (April 2015)

Purpose of Enhancement

This enhancement enables you to configure the Real-Time Availability (using normalization rules) mapping table at the institution level.

In multitenant environments, the upgrade will create a mapping table per institution and add the relevant rows from the installation level. The upgrade will be based on the institution to which the data source (specified in the third column) belongs.

4

New Security Functionality

This section includes:

- **Primo SSL Support (April 2015)** on page 23
- **Cross-Site Scripting (XSS) Mitigation (April 2015)** on page 23

Primo SSL Support (April 2015)

Purpose of Enhancement

This enhancement ensures that all hosted Primo environments support SSL in the Front End and Back Office. SaaS environments enforce SSL for Back Office access. Information on how to configure your Front End to support SSL will be included with the release notes.

Cross-Site Scripting (XSS) Mitigation (April 2015)

Purpose of Enhancement

As part of our commitment to provide ongoing security improvements, each release we will evaluate our vulnerability and block an XSS vulnerability.

