

# Inmagic® Presto v4.1 README

This readme file is for users who are installing or upgrading to Inmagic® Presto version 4.1. This release introduces a number of new features and fixes.

## New in This Release

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### Installation

- **Important!** Microsoft .NET Framework 4.0 is a pre-requisite for installing Presto 4.1. See the installation notes for more information.
- **Important!** If upgrading from a version prior to Presto 3.9, you must upgrade to Presto 3.9 before upgrading to Presto 4.1.
- Presto for DB/Text – A product code is now required for all *new* Presto installations. For System Administrators, the product code is displayed on the About window with a link to display the enabled features.

### Login

- Admin user - If the password for this user is still "admin", you will be required to change it to something else immediately after logging in using this account.

### Home Page

- A new and improved default Home page has been provided for new installations.
- Slide Show web part – Configure Home Page includes a new Slide Show web part, which will show the images for a query in the selected Content Type. Click "Add Web Parts" to add and configure the new web part.
- RSS Feed web part:
  - A new Show Refresh Link setting controls whether a Refresh link appears above the RSS items.
  - A new "Open in new window/tab" setting controls whether clicking an RSS item link opens a new window (or tab, depending on your browser settings).
  - A new "Additional Content Below" HTML control permits you to add information below the RSS items, like a link to a Blog or Forum page.
  - A horizontal rule no longer appears above the RSS items.
  - A new Application Setting, RSSFeedConnectionTimeout (default: 2 seconds), specifies how long to try to access an RSS feed. This prevents delays in navigating away from the Home page if an RSS feed is inaccessible.
  - Rail Express Australia feeds are now supported.
- Quick Search web part:
  - A new Search Box Title Text setting controls the text that appears immediately above the text box. This text is empty by default for new and upgrade installations.
  - Extra vertical space has been removed from this web part.
- Minimize links no longer appear on each web part, to give the Home page a cleaner appearance.

### Search

- A new `TODAYS_DATE` variable permits you create search links that retrieve recent content. For example, `Magazine.Issue_Date=[TODAYS_DATE-7 TO TODAYS_DATE]` will retrieve all issues from the last week.

## Comments

- Comment appearance has been improved.
- The "Did you find this comment helpful?" controls have been simplified, and only positive responses are supported.
- Inline Comments are enabled by default for new installations.
- Comment titles are disabled by default for new installations.

## CSV Download & Export

- Search Results – The action menu bar now includes **Download>As CSV**, so you can export the selected records (from a single Content Type) in comma-separated-value format. This feature is also available from Browse Collection, the InfoCart, and the Detail Screen.
- Export Content – The Export Content page (in Administrator Tools) now includes the option to download in CSV format. You can select which fields to export, and whether to export the records retrieved by the current search or all records in the selected Content Type.

## Screens & Views

- Slide Show widget – Configure Custom Detail Screen includes a new Slide Show widget, which will show the images in the current record.
- Edit widgets – Each added widget in Configure Custom Detail Screen now includes an Edit button.
- Search Screens – The Category field now supports a Popup Lookup control so you can browse and paste from a Category listing. This is the default control for new Category controls, but you will need to edit existing Search Screens to enable this feature.
- Add/Edit Screens:
  - Fields with Value Lists that use a Dropdown control now show (None) as the first entry, instead of a blank item. An empty value is still saved in the database when this option is selected.
  - Required fields with Value Lists that use a Dropdown control now have an "Omit (None) In Drop-Down" check box when defining the control in Configure Screens. If unchecked, a (None) value appears above the Value List values, so users must deliberately select the desired value, rather than perhaps accidentally saving with the first Value List item selected. (None) appears by default for new controls.
- File (and Linked File) fields – Screens and Views now support the ability to display the IFilter text of the document.

## Connector System

- Crawl Job Definitions – A new Bubble Events Option under Advanced Crawl Job Settings permits you to specify that events (Content added, Content modified, Content deleted) should be logged for the records imported by the crawl job. One use for this feature is "New content" RSS feeds on the Home page.
- Crawl Job Schedules – If you check "Filter by Last Run Time", additional controls appear for a One-Time Date Filter. Use this feature if you used Upload to perform the initial data import, and want to have the first crawl job use a date after that Upload operation completed, rather than starting from the beginning. You can also use this with the Network File Connector to import only files newer than a specified date.

- TextWorks/Genie Connector
  - For Upload, a new Discovery Date Range control permits you to perform Upload operations in smaller batches. This is especially useful for textbases with a large number of records (>200,000).
  - On the Monitor Running Crawl Jobs page, the progress display is more granular (the counts after Discovered: and Processed: update more frequently), and it is easier to stop a running job.
- Monitor Crawl Jobs – The row for each crawl job includes a Review Errors link. If errors occurred during a crawl job run (e.g., due to connectivity issues with the WebPublisher server), you can click Review Errors to go to a page listing each run with errors. Click Retry Failed Items next to a run with errors to create a job to retry just the failed items.

## Import Content

- Input files are now deleted by default. In previous versions, they were moved to the ImportSink folder. To restore the prior behavior, see the DeleteInputFiles and FileDispositionOption options in the ImportExportConfigGuide.PDF.
- Logging Events – In Application Settings under PrestoServices, a new BubbleEventsOption attribute on <ImportClient> permits you to specify that events should be logged for all imports (without having to add BubbleEventsOption="BubbleEvents" to each import file).
- XML Import – Matching has been enhanced to allow specifying the match field(s) once at the beginning of the import file, if desired.
- Append Field Entries – The match field is not modified for CSV import, or if the match fields are specified at the beginning of the XML import file.

## Reporting

- Event Log reports – The Email field can be added to each of the Event Log reports, and is available for Advanced Reports in the provided sps\_GetLoginLogoutEvents stored procedure.
- Application Settings – ShowCreateAdvancedReport has moved from the Beta section to the Reporting section.

## Application Settings

- Sorting – SortEmptyLastEnabled specifies that records where the selected sort field is empty appear last in the results, for both ascending and descending sorts. This feature is enabled by default for new installations, and off by default for upgrades.
- Print / E-mail – DisplaySummarySection controls whether the Summary (table of contents) section appears at the top of output for Print / View, Download as HTML, Download as PDF, and E-mail.
- Branding
  - LogoURLReference specifies the URL to open when the logo in the upper left corner of each page is clicked. If this option is left blank, clicking the logo continues to go to the Presto Home page.
  - LoginMessage controls the HTML on the Login page to the left of the Username/Password boxes. The upgrade process moves the contents of LoginMessage.HTM, if any, into this value. However, some fine tuning may be necessary.
  - CustomAboutHTML permits the addition of HTML at the top of the About window.
- Custom Actions – Custom Act on Content Toolbar options (added to ContentActionSettings, etc., and usually configured by Inmagic's Professional Services

Group) can now be associated with specific Content Permissions, so they only appear for users who have specific roles.

- System Maintenance – When SystemDownForMaintenance is used, end-users see a "System Temporarily Offline for Maintenance" page, and Presto Services can be paused. System Administrators can still access the Presto UI by logging in using a specific URL. This feature is useful while upgrading to a new version, keeping users out of the system until it is ready for use, and performing other system maintenance operations.

### Miscellaneous Changes

- Security Question & Answer – These are available but no longer required when creating a new user, and are hidden if the Reset Password link on the Home page is hidden.
- Menus – A blue border appears below the Main Menu bar by default. To restore the previous appearance, see Cascading Style Sheets in Chapter 15: Look-and-Feel Adjustments in the Presto Administrator's Guide.
- Configutil.EXE – The "setdbinfo" command now includes the SQL Server name and SQL Server database, so you can specify the entire SQL connection string.

## Fixed in This Release

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- Unique Text fields now permit multiple records where the field is empty. [3430]

## New in Presto 4.0

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### Search Results

- Results are displayed incrementally, so you see results more quickly, especially for large numbers of records.
- The paging controls have been changed to match those in Browse Collection.
- If a Quick Search retrieves records from a single content type, the Search Results display the records using the default view for that content type. Previous versions always used the "Summary by type" view for Quick Search results.
- The Print button has been removed.
- iFrames have been removed where possible in both Search Results and Detail Screens. This improves 508 compliance and increases flexibility. Detail Screens that display a file in the Body Section still use an iFrame.

### Look and Feel

- Tag Clouds – The appearance of Tag Clouds has been improved. Tags are now listed in alphabetic order instead of in descending order by popularity, all tags are the same color, corners are rounded, and so on.
- Search, Add and Edit Screens use more modern styling (prettier drop-down lists, incrementing number controls, rounded corners, etc.).

### Record Layouts & Custom Screen Layouts

- Record Layouts, a new type of object in Configure Content Types, can be used in Custom Detail Screens or Record Layout Views and give you precise control over the appearance of records. They allow you to build a completely custom display of record data, using simple HTML and javascript.

- Custom Screen Layouts permit you to specify the various areas (zones) of Custom Detail Screens. Several screen layouts, including one with tabs and one with an accordion, are included.

## Configure Screens

- Tabs/Columns/Accordion – Search Screens, Add Screens, Edit Screens, and the Body Section of Detail Screens now permit you to display the controls in tabs, columns or an accordion. Print-Friendly Screens and E-mail Screens now support columns.
- Multiple Screen Support – Each Content Type can now have multiple screens of each type (Detail Screen, Search Screen, etc.). Therefore, the appearance of the Configure Screens page, which used to have one tab for each type of screen, has changed to resemble the Configure Views page. When a screen is displayed, if multiple screens are available, a Show drop-down list on the page permits the end-user to select which screen to see. For Add & Edit Screens, if the system detects there may be unsaved changes, a message is displayed when the user attempts to select a different screen from the Show drop-down list.
- Custom Detail Screens – Give you complete control of the appearance of the Detail Screen, using a Custom Screen Layout, Record Layouts, and various types of widgets (e.g., tag cloud, voting control, etc.).
- Detail Screen – Removing all the controls from the Summary Section in Configure Screens now removes that section from the screen when it is used, so there's more horizontal space to display the Body Section. When you create a new Content Type, Presto automatically creates two Detail Screens: one with all fields in both the Body Section and Summary Section, and another with just a Body Section containing all fields.
- Detail Screen – "Display see also search link" is now available for Text fields with Unlimited checked, and for HTML Text fields. This feature is especially useful for Multi-Value Text fields, like Subjects or Authors.
- Advanced Search Screens – In the Initial Search Screen for a newly-created content type, the default control for Multi-Value fields is now a Textbox (1 line high) rather than a Text Area Edit control (multiple lines).

## Configure Views

- Record Layout Views – This new type of view, available everywhere Citation Views can be used, uses a Record Layout to give you precise control over the appearance of records.
- Create a Copy – You can now create a copy of an existing view, instead of starting from scratch each time.
- Suppress Highlighting – You can now turn off highlighting for individual view items in Views, and individual controls in Detail Screens. Prior versions only supported Suppress Highlighting on Custom Value controls in screens.
- The Default Citation View drop-down list at the top of the page has been renamed to InfoCart View because you can use either a Citation View or a Record Layout View.

## Configure Roles

- Screen and View Permissions – The Edit Role page includes a "Screen And View Permissions" section, which permits you to control access to screens and views by role. The Configure Screens and Configure Views pages have Assign Roles buttons next to each screen/view to permit you to assign access to the screen/view for individual roles.

## File & URL Fields

- Download File(s) - The new Download>File(s) feature available in Search Results, Browse Collection, and the InfoCart permits you to download a ZIP file containing all the files associated with the selected records. Note that the Download As menu has been renamed

to Download. Configure Roles includes a new DOWNLOAD FILE permission that controls which users see the Download>File(s) menu option.

- File & URL fields now can be Multi-Value.
  - On Add/Edit Screens, the File upload control has changed to support multiple files. You can also drag & drop files when using a more HTML5-compliant browser (current versions of Firefox and Chrome, or Internet Explorer 10.0 and later).
  - In Screens, you can specify how many columns to display for File fields (default is 4 columns).
  - In Views, if a File field has multiple values, and you select a thumbnail or tile format, a line appears indicating the number of images (e.g., "1 of 13").
- In Screens and Views, File (and Linked File) fields now support three types of display: thumbnail (image only), tile (image and file name) and link (file name as a link). The default is thumbnail, which may require adjustment for some existing Screens and Views, if the File field is not restricted to images.
- For PDF files, an image thumbnail of the first page is automatically created, stored in the database, and used in thumbnail and tile formats.
- For image files, the thumbnail is now generated once, saved in the database, and thereafter read from the database, rather than being dynamically generated each time. This will improve performance if large images are used in views and screens.
- For PDF files, IFilter text extraction has been improved (words are not concatenated) for files that were created by scanning pages without the proper OCR option. Clients upgrading from a previous version must run a separate utility to extract the improved IFilter text. Because the improved IFilter text extraction is slower, all file operations now use Deferred Indexing, which is now enabled by default.
- In Citation & Grid Views, clicking an image thumbnail now launches the image in a resizable browser window.

## TextWorks Connectivity

- Connectors have been implemented for both Genie and TextWorks. Each works with WebPublisher PRO to read all record and validation list changes directly from the textbase. The Genie connector replaces the previous Presto for Social Libraries implementation.
- Create new Content Type from TextWorks Structure – A new button appears on the Configure Content Types page that permits you to create a new Content Type from a TextWorks textbase structure export file (.tbb or .cbb).
  - The associated Value Lists and Connector components are also created.
  - Once you have specified the .cbb or .tbb file, additional controls appear that permit you to analyze the contents of a .csv file exported from the TextWorks database, to determine which fields have multiple values, contain valid Presto dates, etc. This information will be helpful when using the additional tabs discussed below.
  - Additional tabs permit you to decide which fields in the TextWorks structure should be Multi-Value or Date in Presto, or omitted from the Presto content type.
  - If you do not have TextWorks, you can hide the button by setting the EnableCreateFromTextworksBackup option to False in Application Settings.
- Import supports a new <ImportSettings> parameter, ConvertNewLine="true", which specifies how to handle newline characters in incoming data. If this option is set to true, paragraphs in the TextWorks records are turned into multiple values in Multi-Value Text fields, and to <br> in HTML Text fields.

## Configuring Content

- **Configure Content Type** – If the Content Type does not contain any records, you can now freely change the Data Type for an existing field to any other Data Type (e.g., Text to Date). The prior restrictions on changing Data Types still apply if the Content Type does contain records.
- **Configure Content Types** – Each content type has an additional "Download XML" link, which permits you to download the metadata for the content type (field definitions, screens, views, etc.), including the metadata for any Value Lists used by the content type. Previous versions required constructing an Export Request XML file, and the ability to access a folder on the physical server so you could obtain the exported XML.
- **Configure Value Lists** – Each value list has an additional "Download List As XML" link, which permits you to download the content of the value list in an XML file suitable for import. In addition to enhancing transportability, at times it's easier to make global changes or reorder the list using an external editor, then import the modified values.
- **Configure Content Collections** - Each collection has an additional "Download Categories As XML" link, which permits you to download the categories in the collection in XML format. Note: When importing categories into a collection, there should not already be any categories specified.

## **Federated Search**

- A new Application Setting, `FederatedSearchLayoutControl`, permits one to select either tabs or an accordion layout. The latter is especially useful if there are too many tabs to fit across the page.
- The tabs or accordion sections now use the JQuery theme specified in Application Settings (`JQueryUIThemePath`).

## **Administrator Tools**

- **View System Log Files** – This option permits you to view the contents of the various Presto log files. Note: `Errors.log` has been renamed `Messages.log`.
- **Monitoring SQL Full Text indexing status** - At times, it may be necessary to optimize or rebuild the SQL Full Text index(es) for the Presto database. For example, after removing noise words, or to improve search performance or relevance ranking. In a large database, rebuilding the SQL Full Text index may take a significant amount of time. The Database Cleanup page includes a new `Get Full Text Index Status` option that indicates when the operation is complete, or which tables are still being processed. Running "`configutil getftistatus`" from a Windows Command prompt performs the same function.

## **Reports**

- **Search Events reports** – The Profile E-mail field is now available to be added to the Search Events report, or to Advanced Reports using the profiled `sps_GetSearchEventDataFiltered` stored procedure.
- **Application Settings** – A new `DefaultReportPaperSize` option permits you to specify a default paper size for new reports, for example: Letter, A4, or Legal.

## **Presto API**

- Remember to change the virtual directory for any application that uses the Presto API to use `.NET 4.0`.
- The `InmagicKey` and `InmagicIV` values are now read from Application Settings rather than the Presto `WEB.CONFIG` file. The upgrade process copies the keys into Application Settings.
- For External SSO users, logging out by clicking "Log Out <FirstName>" now destroys the SSO token. Or, you can provide a link to `http://<domain>/<presto-vdir>/ssologout.aspx`.

The SSO token still expires as specified by SSOTokenExpiration if the user closes the browser or navigates away from Presto without logging out using either of these methods.

- If both External SSO and OPAC are enabled, you can now direct OPAC users and authenticated users to different pages when they log out. A new Application Setting, SSOOpacLogoutRedirectURL, permits you to specify the page for OPAC users. You continue to use SSOLogoutRedirectURL for authenticated users.

### Miscellaneous Changes

- Configure Content Types – Report is no longer listed under System Content Types. Reports have no screens or views, so there's no need to configure the content type.
- Internet Explorer 7.0 is no longer a supported Web browser. The new paging controls in Search Results, Browse Collection, etc. do not function properly in this browser.

## Fixed in Presto 4.0

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- Add/Edit Record – When uploading a PDF with encryption/security, saving the record now succeeds. Previous versions displayed a "We are sorry" message with this exception in Errors.log: "PDF uses unsupported encryption algorithm." Clients also encountered this issue with Presto for Social Libraries. [7011]
- Print / View – When you select Print / View from the action menu bar and print, the printed information no longer includes the instructions about printing and closing the window. [1364].
- Configure Views – When making changes to individual views, it is no longer necessary to click Save on the individual Edit View page, then Save again on the Configure Views page. Save on the Edit View page now adds or saves the view. Save on the Configure Views page is only necessary to save changes to the drop-down lists on that page. [8566]
- Reset Password displays an informative message if the specified user does not have a Security Question/Answer saved in their Profile. [8966]
- Help now works in Chrome [9017]

## Getting Started

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A complete set of documentation is available in the Inmagic Presto Knowledgebase (PKB):

1. Start with the **List of Documentation**, which lists the available documents.
2. Install or upgrade Presto, as explained in the **Support Matrix** and the **Installation and Upgrade Instructions**.
3. If you plan to use Presto for Social Libraries, follow the instructions in the **Presto for Social Libraries Setup Guide**.
4. If you plan to use KnowledgeNet, follow the instructions in the **KnowledgeNet Setup Guide**.
5. We recommend that administrators familiarize themselves with the **Presto User's Guide** as well as the **Presto Administrator's Guide**.