

Calm v10 and CalmView v2.2

Guide for Existing Customers

Version 1.1.1

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Calm

Upgrading and backwards compatibility

The implementation of Unicode within the software and the revision of the security functionality (see below) will require all databases to be re-indexed on upgrade. A new Calm Upgrade Utility shortcut will be installed as part of the server/standalone installation and will perform all necessary upgrade tasks, including re-indexing (if necessary) and migration of data in the security database.

Once the data has been re-indexed to v10, it cannot be reverted back to a previous version. Any requirement to revert to a previous version would need to be carried out using a backup of data held pre-v10.

Where a separate copy of Calm is used for a CalmView web front end, this will also need to be upgraded to v10.

Separate upgrade instructions will be issued.

DServe

Calm v10 is not compatible with DServe. This has been announced already on Calm-LIS. Please contact the Helpdesk for further information.

Unicode

Has now been implemented to enable Calm to support a wider range of international scripts and alphabets. Note, to be searchable these characters:

1. Have to be in the database.cvt files, by default Calm only ships Latin characters.
2. The cvt files can contain a maximum 63 slots for characters.
3. Different characters from different alphabets may be set as equivalents.

Any characters can be stored in the database files, but at present there is a restriction on indexing and therefore searching, as above.

Security

General

The Admin Security functionality and the Security database have been merged into a single unit, accessible from Admin. If Security has previously been implemented using either Admin or the Security database, these settings will be migrated across as part of the upgrade (see above). There may be instances where an automatic migration is not possible and may require to be re-configured manually. In this event you should contact the helpdesk.

Security now works with Active Directory, as well as Calm specific security.

The Security functionality controls:

- Access to the Admin Utility
- Administrator rights within Calm e.g. ability to
 - run scripts
 - delete hitlist
 - issue hitlist
 - access fields with the Admin property
- presence of menu buttons
- read, edit, create new record and delete record functionality within each database

Admin Admin-logon

The *Admin Admin-logon*, which gave access to the Delete Hitlist and Issue Hitlist functionality, and allowed an administrator to run scripts, has now been retired. Security will need to be enabled and the appropriate members of staff given Administrator rights within Calm in order to access this.

Population of the Creator and Modifier fields

Earlier versions of Calm used the Windows User Account Name to populate fields such as

- Creator
- Modifier
- MovedBy in Movements database available from Museum functionality
- Notes and Conservator fields in Rejected Conservation request records

In v10 if Security is enabled these fields will contain the Windows User Name.

If Security is not enabled, the contents of the User field in the login dialogue box will be used in these fields. Any data can be entered into the User and password field.

Failed log on lockout

If security is enabled, users are required to enter their Windows User Name in the User field during the logon process. Their password is not required. After three unsuccessful attempts at login, the user will be unable to attempt another logon until a specified amount of time has passed.

Swedish and Danish Translations

Field names have now been translated in Admin. Record types have now been translated in both Admin and Calm.

Please note: if using a DDescribe Natural file to import records, the original field names are still required, not the Swedish or Danish translations.

The original (English) field names can be found by looking at the bottom left hand corner of the database screen.

Changes to field names in Admin

There are now three forms of the field name in Calm. Note the practical difference for customers here is only significant if you are running Calm in non-default (English) language mode.

- 1) The system field name, which is defined in the .DEF file
 - required for DDescribe Natural Imports and Exports
 - required for CalmView
 - can be used in Formatted exports
 - appears in Admin
- 2) The localised field name, which appears in the .lang files and is updated by the translation manager. This allows field names to be translated into any language supported by the Calm translation manager.
- 3) The customer-defined field label, which is stored in the database.UDF file
 - this is applied by customers using Admin
 - it can be used in Formatted reports

The label which appears in Calm itself is based on the reverse order above i.e. a field name defined in the Admin Field options takes precedence over a field name set in the translation option and which takes precedence over the system field.

Picklists

Picklists in Calm are now in the order in which they were entered into Admin. (In previous versions of Calm, picklists would be presented in alphabetical order, regardless of the order in which they were entered into Admin.)

Customer Requests for Enhancement

Product	RFE	Comments	Source of RFE
Calm ALM- Archives only	Archive loan issue report	This will produce a list of loans based on a hitlist in the ArchiveLoans database	Axiell
Calm ALM- Archives only	Collection loan report	A new report called Assoc. Loans has been added to the catalogue database. It allows all loan records attached to a hitlist of catalogue records to be exported in csv format. These can then be imported into Excel, for example, so that calculations etc can be carried out. It can be used for determining how often a collection or series has been requested.	Axiell
Calm ALM	Collection conservation report	A new report called Assoc. Conservation has been added to the catalogue database. It allows all conservation records attached to a hitlist of catalogue records to be exported in csv format. These can then be imported into Excel, for example, so that calculations etc can be carried out. It can be used for determining how much work has been carried out on a collection or series and, if the data is recorded on the conservation record, to calculate overall cost of conservation work.	Axiell

Calm ALM	RefNo search functionality: one search to bring up a whole collection/ series etc	<p>An extra element, Is In, has been added to the match button of tree fields in the search dialogue box.</p> <p>To search for, e.g. the PL collection, click on the RefNo match button, select is in and then type PL into the RefNo field. This will find the records with PL in the RefNo field and all records beneath it.</p> <p>This functionality applies to all tree fields and can be used anywhere within the hierarchy.</p>	SE User Group
Calm ALM	The need for the F9 button in general was questioned by some	F9 functionality will remain but the following fields will be made visible on records by default: Modified, Modifier, Creator and Created	SE User Group
Calm ALM	It would be useful for users to have a list of the scripts available for use with CALM.	Documentation to be amended for v10, alongside instructions for running them.	SE User Group
Calm ALM	Some scripts should be part of standard CALM functionality - Hitlistfill and Insertfield for example. These should be admin user functions that can be selected from a menu drop-down.	The core scripts have been made available with Calm v10 Scripts will continue to be accessible only to Administrators.	SE User Group
Calm ALM	A current useful feature is the ability to add the same text into the same blank field across a hit list, but users would also like to be able to import an external dataset which added different text for each record into the same blank field (e.g. importing place co-ordinate data for		SE User Group

	image catalogue records). It is possible to merge in this sort of data using a script but it requires access to the system in a way that most of us do not have, in security-conscious environments: it would be good to be able to do this more on the surface of the system rather than “under the bonnet”.		
Calm	Increase number of fields in overview	Increased to 19.	General
Calm	MP4 video to be added to multimedia field	Added.	General
Calm	Date parser: add unknown as an accepted term, same parameters as nd.	Added.	Axiell
Calm RM	Full loans database view. (At present we have 3 pre-filtered searches – current, overdue and historic)	Added.	General
Documentation	Documentation to be brought together to form a convenient, unified downloads area in the Forum.	Will be made available	SE User Group
Documentation	that this documentation should comprise both a “What’s New” list and a list of bugs addressed by the new release;	This was the intention but the number of issues fixed has increased since this original point in the RFE process. This will be done but is not part of this initial What’s New document.	SE User Group

Other RFEs

RFE	Comments	Source of RFE
Document ordering: linking to a location means that at present what shows up the record is a code taking one to that entry in the location database: for printing out purposes etc it would be better to have this display as the actual location	As a record no longer needs an attached location record, the necessary field will vary from customer to customer. The file can be amended by customers to select the preferred field. Documentation amended to make this clearer.	SE User Group
Information sought on how advance ordering will work.	Documentation revised.	SE User Group
Reporting: excel reports to contain statistical calculations.	This is Excel functionality rather than Calm. Documentation has been amended to show how this might be done.	General

Further investigation by Axiell ALM Ltd required

These changes have not been implemented

Product	RFE	Source of RFE
Calm ALM	Increment siblings: suggested that it be called something a little less confusing like- insert record.	SE User Group

Calm ALM	Increment siblings: the functionality should be changed so that a new record is automatically created with the reference number filled in with the reference of the new node. It would also be nice if you could insert more than one record at a time - this could be implemented in the form of a dialogue box in a similar way as the 'create sibling' dialogue box.	SE User Group
Calm ALM	Pre 1752 dates.	General
Calm ALM	Keyboard short cuts set up on server.	General
Calm ALM	Authority files when added are simply in order of input: is it possible, either in the system or in CalmView, to have them e.g. file in alphabetical order?	SE User Group
Calm ALM	When creating multiple sibling records, the selected record should be the one at the top of the new created records rather than the one at the bottom. This is a small point, but it can be quite frustrating entering information in the record to see it go in the last record and then having to change reference numbers accordingly.	SE User Group

CalmView 2.2

Increased accessibility

Users of screen readers will now have a better experience as the functionality to facilitate this within CalmView has been improved.

Any Text search

Fields which form part of this search are selected using the Admin Utility. Within Admin, open the appropriate database and then go to Field/ Hide/Show in Opac. All the fields in the *Visible* box will be included in an Any Text search in CalmView.

Calm for Records

Records from this system can now be searched in CalmView and has been added to the configurator.

User registration and logon has been enabled, allowing records to be restricted for search according to loan group.

Anomalies Fixed in Calm v10

Included below is a list of the main anomalies fixed between release of v9.3 and v10. Note that some anomalies can be environment, local data or other related issue and therefore may not have directly affected your site.

ImageView – compatibility issue when using the multimedia field, sometimes prevented files from opening. Since this was fixed we have added support for xml based Office files (.docx, .xlsx, .pptx, etc). However will not be available until the first v10 Service Pack release.

Copies tab – records classified as Library were showing a Copies database tab. This is a legacy issue and the tab has been removed.

Drag/drop in tree – the Modified/Modifier fields were not being updated.

Unreliable results from dialogue boxes – e.g. Calendar in document ordering was not always presenting the correct date options.

Command Line Search – the [NEAR] search attribute referenced in the manual was causing the search to crash. This search option has been removed and manual updated.

HitListSort – when checking sort by last word, it was sometimes causing an error in Calm.

Default media viewer – using default media viewers could sometimes cause same (last) instance of media file to display rather than the new one selected.

Currency Conversion table – Calm Special Library users have an option in Admin under Edit, Lookup Tables to set currency conversion rates, editing this file was causing Admin to close without saving.

View Order button in Special Library Acquisitions – this was not working in v9.2 or v9.3.

Mailmerge.ini file – Enquiries Word templates were including some erroneous fields.

Performance databases – Admin fields not being added by default to record templates.

Autoprint function in Loans – were not always printing.

Transfer button Conservation, loan history for conserved items – was not searching correct database.

Tree refresh – if the tree was open and you did a new search, the tree was not automatically refreshed. This is a known issue and has still not been resolved successfully.

Missing media fields in some databases – some databases did not have image, thumbnail, multimedia fields defined, all databases should have all these fields.

Multimedia field properties – right click and choosing properties was sometimes causing the system to crash.

OAI harvester digital content – was not possible to set harvester to take only data records that had a multimedia field.

Date period unknown – was not recognised by parser.

PriceFill script – modified to add same content to same blank field across a hitlist.

Export loans data – button to Export loans was not working.

Save/Refresh button – was not always being highlighted and therefore could not be used.

Images database HitList Delete – was stopping at the first record.

Print Distribution Lists – Calm Special Library application was creating blank list.

Performances database 64 bit installation – was not setting the database correctly in registry and therefore would not open the Works database.

Unhelpful error message when installing Calm on 64bit Windows server that did not have IIS or .NET installed.

Mix of Blue and Classic screens – on some versions of Windows 7, the search boxes were displaying a mixture of Blue and Classic Calm themes.

Linked Data authority file – where there was no internet connection the linked data process was failing with an unhandled exception error.

Loans Purge – was not working.