

Guide for Existing Users

Calm Version 9.2



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ABOUT THIS PUBLICATION

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1. DOCUMENT INFORMATION

1.1 Document Revision Log

Version 1 created February 2012.

1.2 Document Ownership & Audience

Prepared February 2012 by Malcolm Howitt and Mel Peart.

Audience: existing customers who use the Archive functionality within Calm ALM.

2. INTRODUCTION

This Guide is for customers using the archive functionality in Calm for Archives, Local Studies and Museums. No changes have been made to museum functionality or to functionality within in Calm for Records Management.

This Guide covers changes made in Calm for Archives, Local Studies and Museums to support the document ordering functionality in CalmView v2.0 and to improve the loans and productions workflow within Calm. These changes may result in some customers having to adjust their current working practices and we do recommend that everyone reviews this document before upgrading. Any queries about the new workflows should be addressed to the Calm Helpdesk in the first instance. In addition, we have supplied an update routine (see below) to ensure that data complies with the new workflows.

We appreciate that some customers who do not wish to use the document ordering functionality in CalmView may choose not to upgrade to Calm v9.2. Nevertheless, we would ask that any RFEs about the loans and productions functionality within Calm should be made based on this functionality rather than that in v9.1.

Please note: no changes have been made to the Museum functionality or Local Studies functionality. However, customers should be aware that the revised archive loans functionality is **not** compatible with DServe. Therefore customers who have implemented online ordering in DServe will not be able to upgrade to Calm v9.2 until they migrate to CalmView. Customers using DServe without document ordering functionality are able to upgrade.

All new Calm ALM features are also documented in the online Calm manual. The URL for the Calm Online Manual is:

<http://www.dswebhosting.info/alm/index.htm>

Username: ALM

Password: Tree (case sensitive)

The original specification for document ordering in CalmView is available on the Axiell Calm Forum: www.AxiellCalmForum.com .



3. UPDATE ROUTINES: PLEASE READ

Changes have been made to the loans database in order to ensure it is compatible with the document ordering functionality in CalmView. Customers with existing data in the Loans database which they wish to transfer will need to do the following:

Go to the Administration Menu, Update Routines, Mandatory and click on Archive Loans.

It is best to ensure that no one else is using Calm when this routine is run. This is because the routine can only work on records available for editing and records automatically become read only when someone is viewing them.

If existing loan records contain broken links to user or catalogue record, an error log will be generated. If this loan data needs to be retained within Calm, then the relevant user and item records will need to be created and the update routine rerun.

If this update routine is not carried out, then after the upgrade the loans database will be empty and previously created data will be inaccessible.

Please Note only data from the following fields will be transferred:

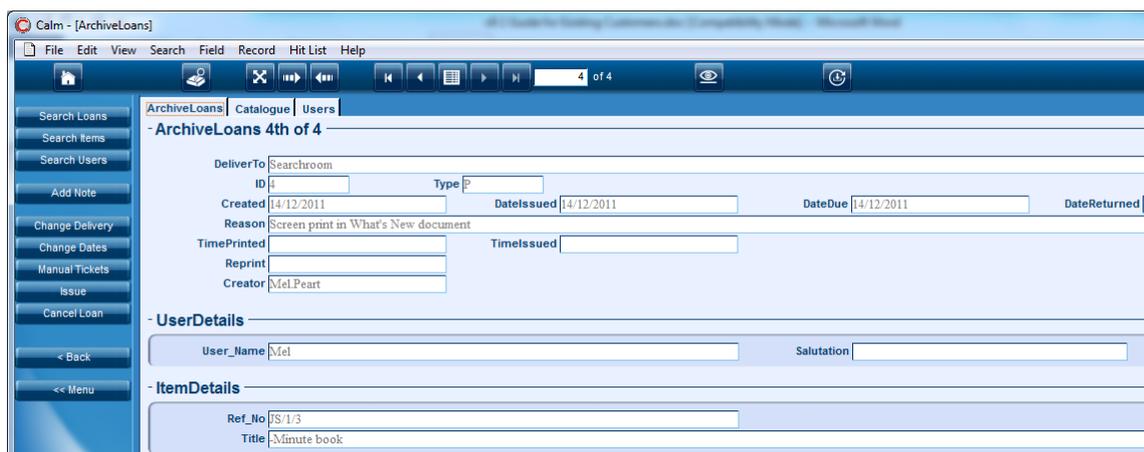
Pre-Calm v9.2 field	Calm v9.2 field
LoanType	Type
LoanID	ID
ItemID	Item: please note, this is a hidden field. RefNo, Title etc will be visible as part of the linked catalogue data at the bottom of the loan record.
DateIssued	DateIssued
TimeIssued	TimeIssued
DateDue	DateDue
Returned	DateReturned
LoanUse	Reason: single instance of the reason field will be created
Reason	
Note	Note Separate instances of the Note field will be created for Note and SpecialConditions field.
SpecialConditions	

If you wish to retain data from other fields, it is recommended that prior to upgrading you export the data. Please refer to the Manual for how to do this - http://www.dswebhosting.info/alm/main_menu/importing_and_exporting/exporting_records.htm .



4. LOANS DATABASE

The Loans database is now read only. This is to ensure that automated ticket printing etc is not stalled by records being inadvertently locked for editing by users. The loan record is created and automatically populated during the issuing of a loan or production and the process has been enhanced to include reason for loan and delivery location. Once the loan record has been created, it can be amended by the function buttons on the left hand button strip.



The cancel loan function includes the option to give a reason for the loan cancellation: Missing; Unfit; or Other, where the customer can provide different explanations. Missing and Unfit are both copied to Order Status Override field in the catalogue record, automatically preventing future orders **in CalmView** (please see below).

Moving and tracking items is now improved as each loan record will only contain a single item. It is, however, now possible to issue a hitlist of items from within the catalogue. This function is restricted to people logged on as Administrators.

5. ISSUING LOANS AND PRODUCTIONS

As before, Loan records can be created from within the catalogue or from the Loans database. In addition, an extra function button on the left hand button strip has been added to enable a hitlist of items to be ordered from within the catalogue. This functionality is restricted to those logged on as Administrators.

The screenshot shows the Calm - [Catalog] interface. The main window displays a record for 'Minute book' with the following details:

IDENTITY	
Level	Item
Repository	Archive
Ref_No	JS/1/4
Extent	1 volume
Title	Minute book
Date	1920-1922

CONTENT	
Description	
Format	
Category	

ACCESS	
Location	
Access_Conditions	
Access_Status	Open
Physical_Description	

The interface also includes a left-hand navigation menu with buttons for Search, Record >, Tree >, Link Record, Authorities >, Location >, Issue Loan, Issue Hitlist, Cancel Loan, Reports >, Search Names, Search Places, < Back, and << Menu. The top menu bar includes File, Edit, View, Search, Field, Record, Hit List, and Help.

Loans may also be cancelled or returned from within the catalogue, using the Cancel Loan button. This enters today's date into the Return Date field on the open loan record.

5.1 Catalogue records

Two fields are now being used to determine whether an item is orderable **within CalmView**: Order Status and Order Status Override

- An Order Status field containing a value must be present.
- The Order Status Override field must either not appear on the catalogue record, or have no value.
 - This field has been added in order to allow material to be withdrawn from circulation temporarily.
 - If a loan or production is cancelled from within the loans database (eg because the item is found to be unfit for production or missing), this field will be inserted into the catalogue record with the appropriate data, thereby preventing further orders via CalmView.

If an item is issued from **within Calm** and the Order Status field is not present or is empty, a dialogue box will appear, permitting the user to choose whether to continue with the order. Likewise, a similar dialogue box will appear if there is a value in the Order Status Override field. This is to allow archive staff to be able to order, for example, items that

would not be made available to researchers. It also means that customers who do not wish to use the document ordering functionality in CalmView do not have to add Order Status fields to their catalogue records.

To support the necessary changes to existing catalogue records, two scripts will be made available via the Calm Helpdesk.

- to add the Order Status field to a hitlist and populate it
- to empty the Order Status field on a hitlist of records.

Please note: the contents of the Access Status field and the presence of an attached location record no longer affect whether an item can be issued from within Calm.

The following remains the same as in Calm v8:

- An item must have a value in the RefNo field
- a loan booked for the same time, or where an item has been transferred to conservation will prevent an item being issued.

In addition, two other fields interact with the CalmView ordering functionality:

Order Ref No: This allows substitutions to be made to allow, for example, a microfilm copy to be ordered in place of the original. Please note: this substitution only operates in CalmView. This is to ensure that archive staff can order original material or surrogates as necessary.

Lead Days: used for material held offsite. This field is only used for orders via CalmView: an item marked as having 2 lead days can only be ordered 2 or more working days in advance. Likewise, once the item has been returned by the researcher, Calm will assume that it will take 2 working days for the item to be returned to the Store. Staff issuing material from within Calm can issue an item regardless of any figure in the Lead Days field. Please note: Calm will not produce a dialogue box alerting staff to the presence of lead days.

5.2 Administration

Loan parameters continue to be managed in the Administration menu within Calm.

A new parameter has been added:

- **Purge Threshold:** this is for recording how many months a completed loan record should be held in the system. The purge function is accessed via the Loans menu and is only available to administrators. When an administrator chooses to use the Purge loans function, any loan data which is older than the number of months entered in the purge threshold is exported to a text file for permanent storage or deletion as required, and the loan records removed from Calm.

Other functionality has also been altered:

- The office name (entered in the parameters section from the administration menu) is no longer printed on a loan/production ticket.
- Opening times no longer interact with the Archive production and loans process



- Parameters/ Loan Parameters: Maximum number of items on one loan and Number of Items on loan before a warning is issued no longer interact with the Archive production and loans process

5.3 Printed tickets/ production slips

A ticket is no longer automatically produced when an item is issued. Tickets can be printed manually, from within the loans database using the Manual Tickets button. As before, automatic printing can be set up.

Content of the ticket depends on whether it is a Loan or Production, as determined by the Type field in the Loans database.

The loan tickets can be customised.

See the Calm ALM Manual for full details of automatic printing and customising production slips.

6. PRE-DEFINED SEARCHES

New functionality has been added to Admin to allow customers to define specific searches for each database. This is to enable each institution to create and maintain its own searches which are available to all staff. It is envisaged that, in some circumstances, customers will use these as a way of gathering statistics for loans, enquiries etc.

These predefined searches are then available via the search dialogue boxes in Calm. [predefined search] must be added to the appropriate dialogue box using Administration Menu/Search Dialogue function. This causes a new field to appear on the search dialogue box called User Search. This has a drop down list of all the defined searches. As with any other drop down list in the search dialogue box, select the appropriate element and press Find.



Please note: the Save search functionality available via the search dialogue boxes remains unchanged. Where Calm is set up as a client server model, this allows individual users to save their own searches within Calm which are then only available via that Calm client.