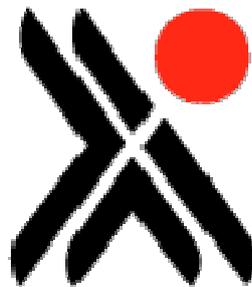


Guide for Existing Users
Calm version 9.3
and
CalmView 2.1



ABOUT THIS PUBLICATION

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1. DOCUMENT INFORMATION

1.1 Document Revision Log

Version 1 created October 2012.

1.2 Document Ownership & Audience

Prepared October 2012 by Malcolm Howitt and Mel Peart.

Audience: existing Calm for Archives, Local Studies and Museum users.

2. INTRODUCTION

This introductory guide is for existing Calm for Archives, Local Studies and Museums (ALM) users and primarily covers the changes made to support Linked Data functionality, both within Calm and CalmView 2.1. It also covers additional minor amendments made to Calm v9.3 and CalmView 2.1.

No changes have been made to Calm for Records Management.

Please Note:

- All new Calm ALM features are also documented in the online Calm manual:

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

Username: ALM

Password: Tree (case sensitive)

- All new CalmView features are documented in the CalmView Installation and Configuration Guide available at
<http://www.calmview.eu/calmviewmanual/>

3. LINKED DATA IN CALM

3.1 Overview

The Linked Data functionality allows data from external (web-based) sources to be added to records within any of the Calm databases in Calm ALM. This data can then be used to search on, and the original source data viewed via the linked URL.

Likewise, the linked data can be enabled and then viewed and searched upon via CalmView.

The Linked Data functionality within Calm ALM v9.3 and CalmView 2.1 was specified by the StepChange Project, a JISC funded project led by Kings College London. Further information about the StepChange Project can be found at <http://openmetadatapathway.blogspot.co.uk>.

Axiell CALM Ltd will continue to develop Calm to support Linked Data functionality, via specific projects and the Request for Enhancement process. In addition, the functionality has been provided for customers to configure their own external data sources for use within Calm (see section 3.5 below).

3.2 Requirements

In order link to an external data source, the following are required:

- An internet connection
- The external website to make the data available for linking
- XSLT transform code to make the XML supplied by the external website readable by Calm (see section 3.5 below)

3.3 Default settings

As part of the initial project, three data sources have been enabled within Calm:

- AIM 25
- The British Library
- Wikipedia

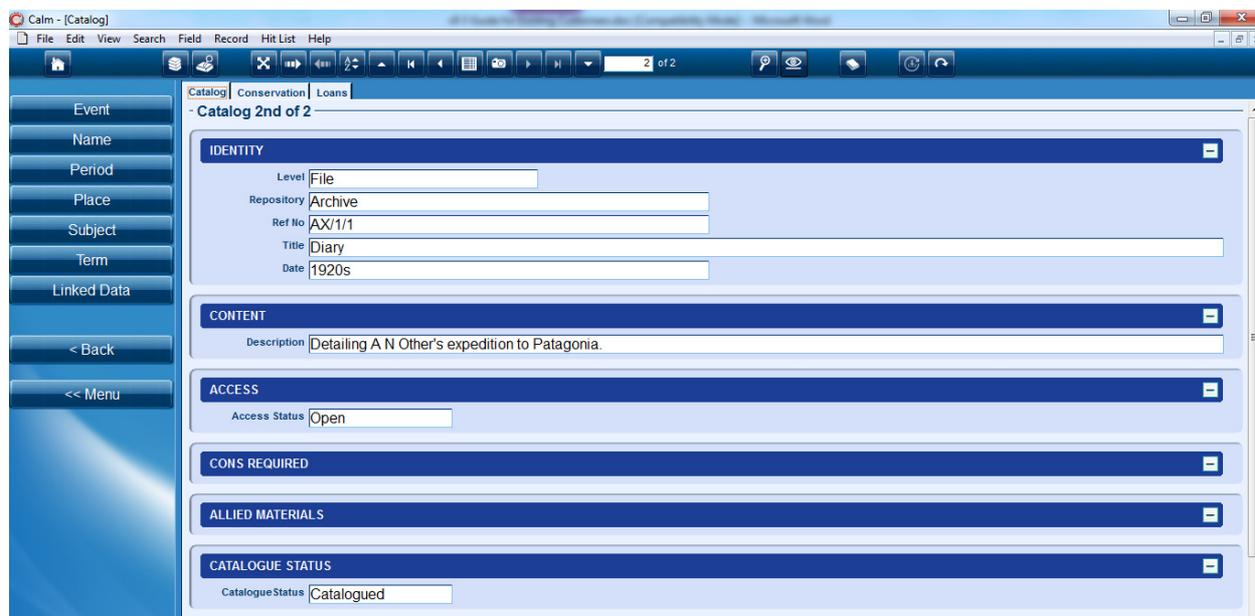
These sources can be linked to any database within Calm using the Linked Data feature found under the Administration Menu in Calm (see section 3.5). By default, the settings are as follows:

- Catalog: AIM25, The British Library, Wikipedia
- Persons: AIM25
- Places: AIM25



3.4 Using the Linked Data functionality

The Linked Data functionality is accessed from the left hand button strip. In the Catalogue database it can be found under the Authorities button in Archive and Local Studies functionality, and under Associated in Museum functionality. In other databases within Calm, the Linked Data button is available directly on the left hand button strip.



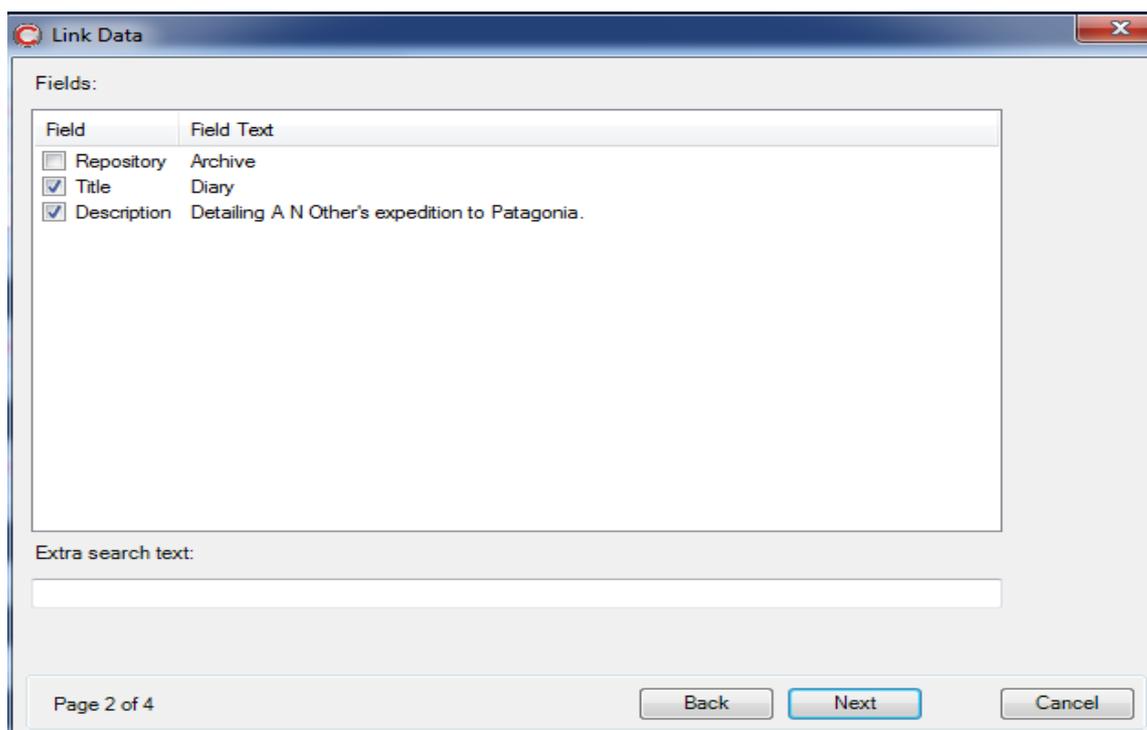
The screenshot shows the Calm Catalogue database interface. The left-hand menu includes 'Event', 'Name', 'Period', 'Place', 'Subject', 'Term', 'Linked Data', '< Back', and '<< Menu'. The main content area displays a record for 'Catalog 2nd of 2' with the following fields:

- IDENTITY**
 - Level: File
 - Repository: Archive
 - Ref No: AXJ111
 - Title: Diary
 - Date: 1920s
- CONTENT**
 - Description: Detailing A N Other's expedition to Patagonia.
- ACCESS**
 - Access Status: Open
- CONS REQUIRED**
- ALLIED MATERIALS**
- CATALOGUE STATUS**
 - Catalogue Status: Catalogued

Catalogue database: Archive functionality

A Linked Data wizard guides the workflow, to determine

- the required external data source
- the text to be submitted to the external data source (either from existing text fields in the catalogue record or from additional text, entered at this stage)
- the term/s from the external data source which are to be linked to the catalogue record
- whether the term/s should be added to the original catalogue record, or the entire hitlist.

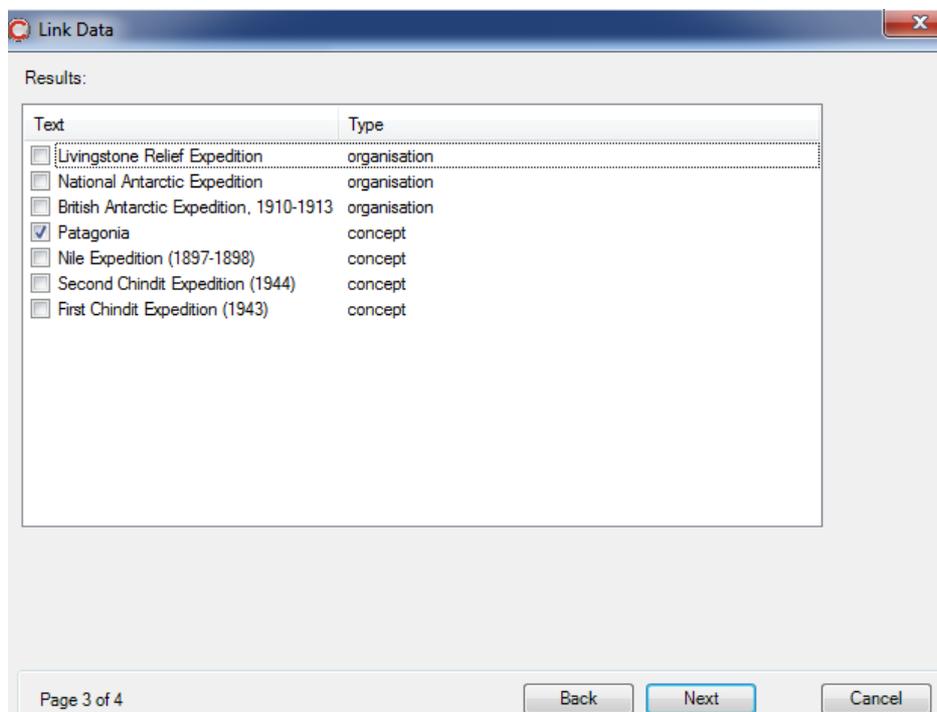


The screenshot shows a window titled "Link Data" with a close button (X) in the top right corner. Below the title bar, there is a section labeled "Fields:" containing a table with two columns: "Field" and "Field Text".

Field	Field Text
<input type="checkbox"/> Repository	Archive
<input checked="" type="checkbox"/> Title	Diary
<input checked="" type="checkbox"/> Description	Detailing A N Other's expedition to Patagonia.

Below the table is an "Extra search text:" label followed by an empty text input field. At the bottom of the window, there is a status bar showing "Page 2 of 4" and three buttons: "Back", "Next", and "Cancel".

Linked Data Wizard screen: selecting text to be submitted to the external data source. Please note: only populated text fields from the Calm record are included in this list. System fields (such as Access Status and Catalogue Status in this example) are not included.



The screenshot shows a window titled "Link Data" with a close button (X) in the top right corner. Below the title bar, there is a section labeled "Results:" containing a table with two columns: "Text" and "Type".

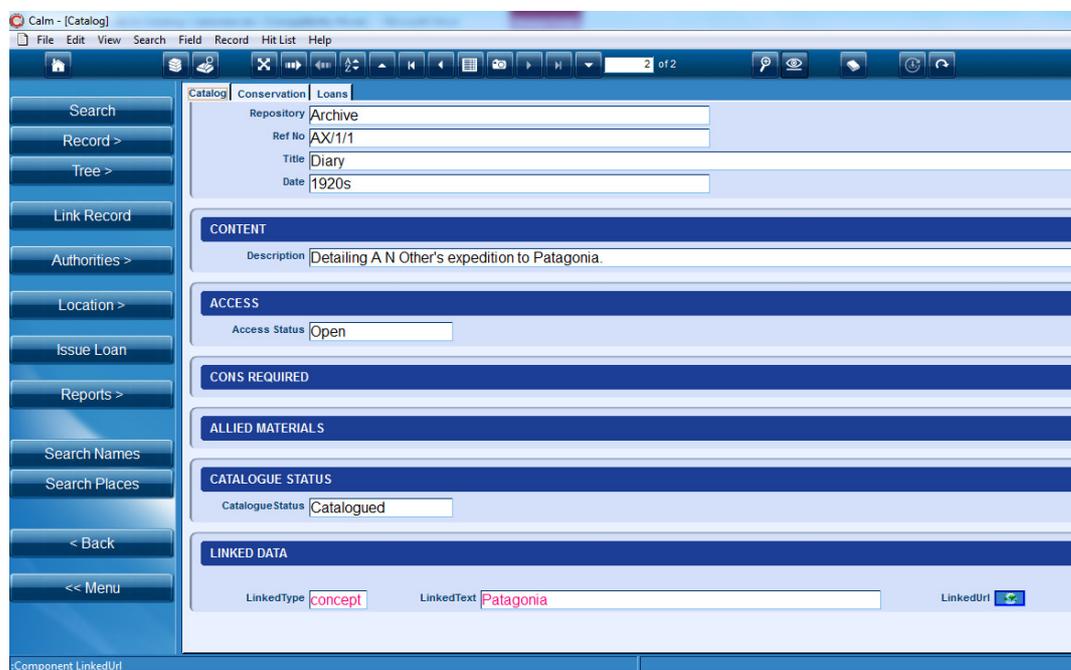
Text	Type
<input type="checkbox"/> Livingstone Relief Expedition	organisation
<input type="checkbox"/> National Antarctic Expedition	organisation
<input type="checkbox"/> British Antarctic Expedition, 1910-1913	organisation
<input checked="" type="checkbox"/> Patagonia	concept
<input type="checkbox"/> Nile Expedition (1897-1898)	concept
<input type="checkbox"/> Second Chindit Expedition (1944)	concept
<input type="checkbox"/> First Chindit Expedition (1943)	concept

At the bottom of the window, there is a status bar showing "Page 3 of 4" and three buttons: "Back", "Next", and "Cancel".

Linked Data Wizard screen: list of terms returned by the external data source. Please note: the text and the link type are determined by the external data source.

3.5 Catalogue View of Linked Data

The terms appear in the Linked Data section at the bottom of the catalogue record. The LinkedURL field provides a link to the source website.



Catalogue database: showing Linked Data fields.

3.6 Configuring the Linked Data settings

The following can be carried out from the Linked Data functionality under the Administration menu within Calm:

- Adding new data sources
- Editing linked data sources
- Making linked data sources available to databases within Calm
- Deleting linked data sources from Calm

Please note: it is very straightforward to make an existing linked data source available to any of the databases in Calm by using the Modify Linked Data Source wizard, outlined below. In order to add a new data source to Calm, a good working knowledge of XSLT is required. More information is available from the [Calm Service Desk](#).

The Modify Linked Data Source wizard guides the workflow for adding new data sources and editing existing data sources, allowing the following to be defined or amended:

- The name of the source
- The URL of the source and the data source's required format for submitting a query
- The XSLT transform coding
- The databases within Calm which are to link to the external data source



It is possible to check that XSLT transform code performs as intended from within the wizard, using the Test button on the XSLT transform code page.

Please note, when preparing to add a new external data source, the following are required:

- The format of the query required by the data source - either Get or Post
- The XML format of the data source's response - external data sources may return responses in any XML format.
- A working knowledge of XSLT in order to write the XSLT code which will convert the external data source's XML into a format which Calm can understand (stage 3 of the Modify Linked Data Source wizard).

4. LINKED DATA IN CALMVIEW

4.1 Presentation in CalmView

Linked Data in Calm can be published over the web using CalmView. Each link consists of a text description/ linked term, the relationship type, and the URL for the data in RDF/XML format presented as hyperlink.

Linked data can be presented in CalmView as a list of terms in a panel to the right of the record view.

The screenshot shows the Axiell CalmView interface. At the top left is the 'Virtual Catalogue' logo. The main header includes navigation tabs: Home, Advanced Search, Showcase, and Image Gallery. A search bar is located on the right. Below the navigation is a breadcrumb trail: Search Results > Record > Hierarchy Browser > Record. The main content area displays a record for 'Lib 09' with the following details:

Ref No	Lib 09/0083
Alt Ref No	9 Unk
Title	The Universal Pocket Companion
Author	unknown

To the right of the record is a panel for 'AIM25' with the following sections:

- People:** [Pickering | Charles London | 1908-1998 | printing educator](#), [Lincoln family | of London | organ builders](#)
- Organisation:** [Admiral Scheer](#)
- Concepts:** [Universal education](#)
- Places:** [Salerno, Provincia di Salerno, Campania, Italy](#)

At the bottom left, there are 'Quick links' for Site Map and Privacy Policy. At the bottom right, it says 'Powered by CalmView© 2008-2012'.

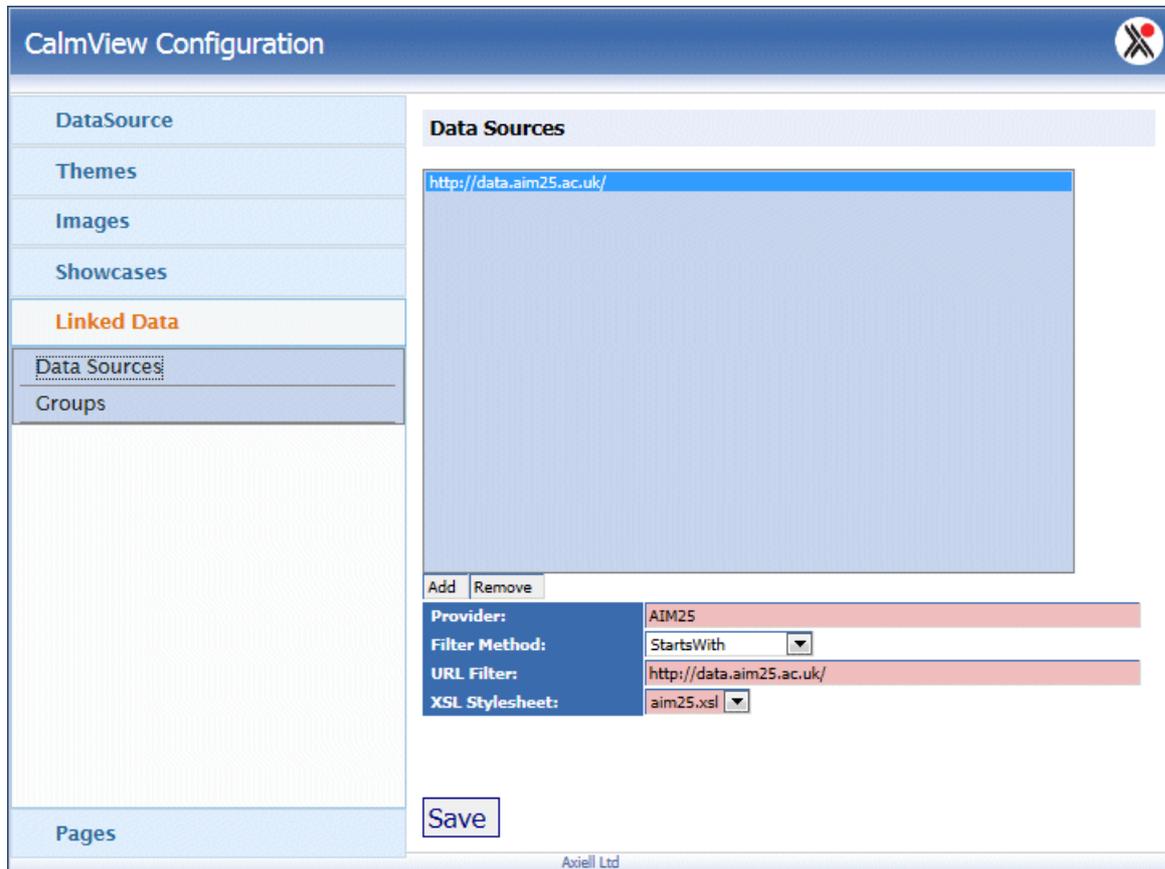
Basic CalmView site, showing Linked Data

In this example the record has been linked to AIM25, the text description is a clickable link to the source URL, and the terms have been grouped together according to relationship type (eg people, organisation, concepts and places). As usual with CalmView, stylesheets can be used to customise the appearance of the links, footers, page layout etc.

Please note: where the link contains mapping co-ordinates, settings can be selected within the configurator so that these can be used to display a map from a list of online map providers. Please see section 4.3 for further information.

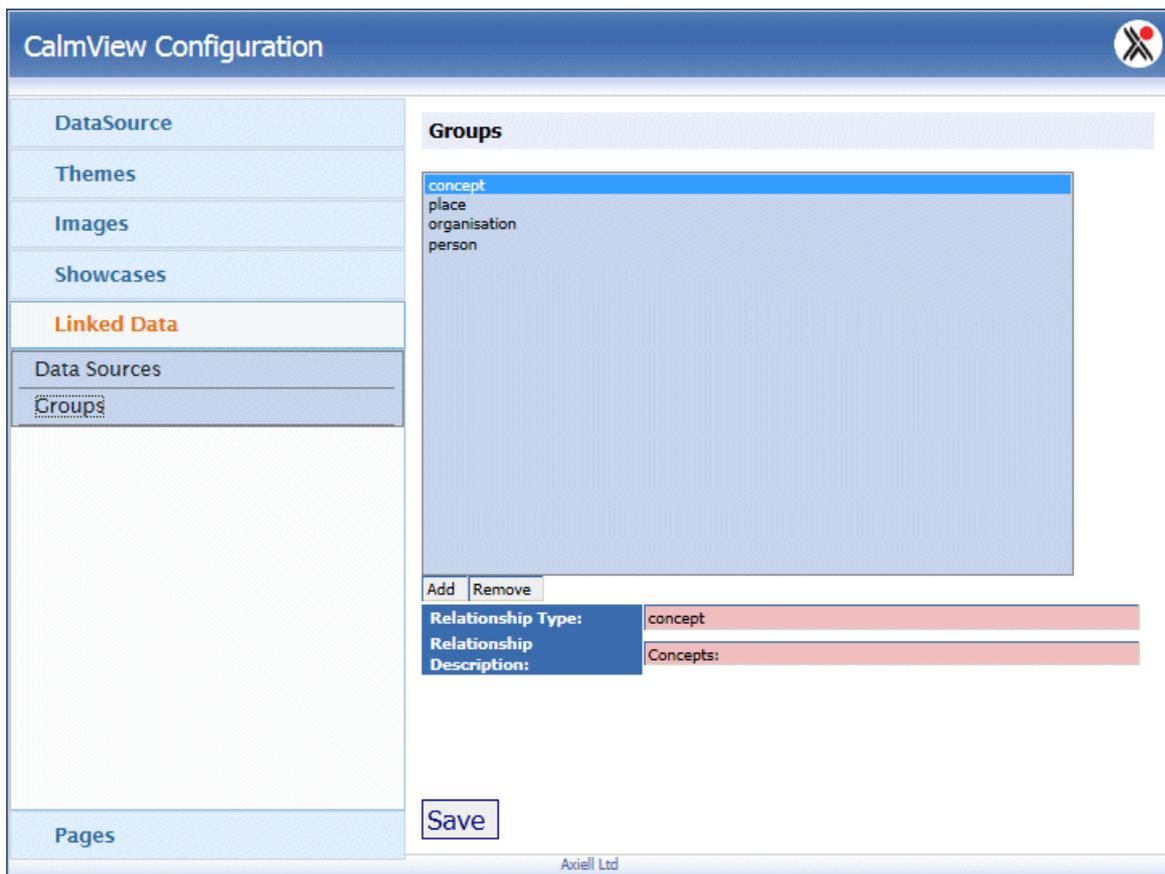
4.2 Enabling Linked Data within CalmView

Linked data settings are available in the CalmView configurator, underneath 'Linked Data'. Each external data source which is to be shown via CalmView must be added using the configurator as shown below:



CalmView Configurator: linking external data sources to CalmView

The Groups functionality allows the terms to be arranged according to relationship type, eg place or concept, under a heading. The relationship type is determined by the external data source and cannot be changed. However, the heading for each relationship type can be determined within the CalmView configurator using the Relationship Description field. In the example below, the settings will group all terms marked as concept in the original data source together under the heading "Concepts:."

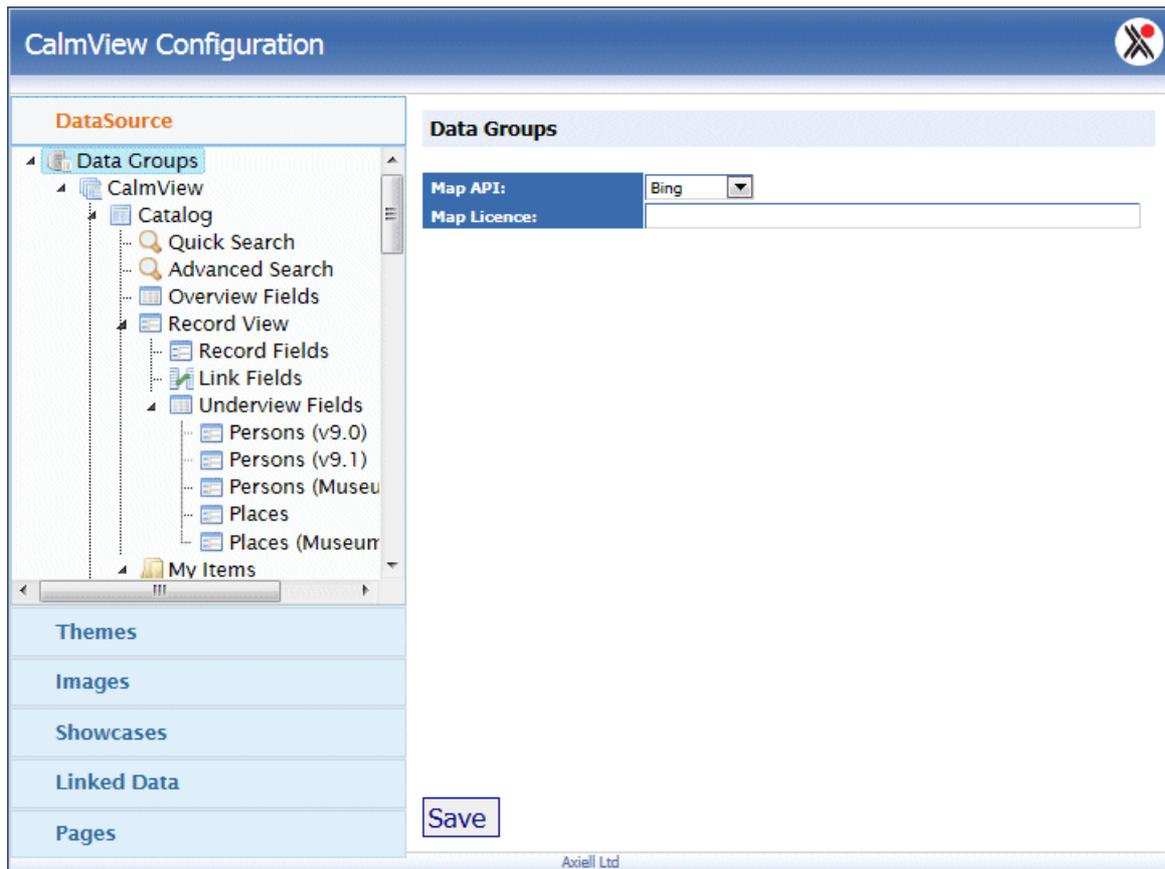


CalmView configurator: groups functionality

4.3 Displaying Maps within CalmView

If a linked data object contains mapping co-ordinates, these can be used to display a map. The online map provider and licence information are set using the Data Groups page, which is directly beneath Data Source within the CalmView configurator.

Please note: Free mapping services may have strict usage limits, and most mapping providers will require an account to be set up in order to obtain a licence key.



CalmView Configurator: enabling maps

5. CALM RECORD ID FIELDS

An undetected error in Calm ALM and in Calm for Records Management v8 resulted in the duplication of data in the RecordId fields. To correct this please contact the [Calm Service Desk](#) for advice.

Please note, this is imperative for customers using the revised Archive Production and Loans functionality which was made available in Calm ALM v9.2.



6. CALMVIEW STATISTICS

The CalmView statistics module has been retired in light of the many third party tools now available for monitoring website usage, and which many customers are already using. Development time has been reassigned from the statistics package to functional development of CalmView. Customers are asked to contact the [Calm Service Desk](#) for further information on external statistics packages.

CalmView still records information which can be analysed to determine usage of the site. Transactions are recorded in a monthly log file which can then be analysed using a data analysis tool.

