CalmView

CalmView 5
Installation and Configuration Guide

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Contents

CalmView v5.0 Installation and Configuration Guide

Welcome to the Installation and Configuration Guide for Axiell's CalmView. CalmView makes your Calm records searchable online, and this guide explains how to install CalmView (or prepare to have it installed by Axiell), which aspects can be customised using its Configuration tool (referred to as the 'Configurator'), and which additional files can be customised using a text editor (one which supports Unicode).

Introduction to Installation

The Installation section describes how to prepare for CalmView installation by Axiell, or how to create your own CalmView website, setting up a development environment on which you will configure CalmView and a separate server that the public will use to search and view your Calm data. The minimum requirements for the machines involved in developing and running a CalmView website are detailed on a page in the Reference section.

The Configurator

The Configurator is a tool which allows you to edit many aspects of CalmView, including which fields are displayed on a record, whether images have watermarks applied, how the user can search, and more. The section 'The Configurator' covers how to use this tool, and pages here are listed in the same order as options in the Configurator, for ease of reference.

Additional Editing

Many CalmView settings can be configured by editing files directly, often in a text editor like Notepad. Many of the changes brought in by CalmView 5 (such as editing the appearance of the home page, the sidebar, or the main menu) are controlled by editing files directly. **Please Note:** You should only edit the files specifically mentioned in this guide unless specifically instructed to by Axiell.

Reference

Finally, the Reference section includes other helpful information, such as contact information for Axiell, a glossary of terms, frequently asked questions, and a quick reference that can tell you the correct place to go to edit a particular aspect of CalmView.

Introduction to Installation

Installing CalmView and building your CalmView website will involve two main machines or environments, plus an optional third. It is important to understand the purpose of each of these and what your organisation will need to do to install CalmView in the correct way or to prepare for a member of the Axiell staff to carry out this work for you.

They are:

» The server that contains your current, live version of Calm (which is linked to your Calm clients). This is the source of data that will appear on your CalmView website.

» A live web server, this will be the public-facing front end. This is where your users can search for and view your Calm records, without being able to perform internal operations such as configuring CalmView elements or modifying your working copy of Calm data.

» A development environment with Calm and CalmView. This is optional. This is where you can configure CalmView before exposing it to the web, if you would like a safe 'sandbox' environment to test changes.

Please note: All these environments must run the same version of Calm and the same version of CalmView (CalmView on the development environment and public-facing server only). When you receive software updates from us, your organisation will need to install them on each of the relevant machines.

The first step in installation is to check you have the minimum requirements for CalmView. It is important to check these requirements even if Axiell are carrying out the installation for you. Please be aware that if these requirements are not met prior to the date of the scheduled CalmView installation it may result in the installation not being carried out and your organisation being charged for the site visit.

Your next step will depend on whether your organisation or Axiell are carrying out the installation. If it is Axiell, please see Axiell Installation. Otherwise, instructions for installing CalmView yourself begin in Development Environment.

Why so many locations?

Axiell recommends using separate machines (or virtual machine environments) for the purposes listed above. This can help to ensure that CalmView, which is exposed to the public web, and your live version of Calm, which is used for data entry, have some separation between them, for security and convenience purposes.

Axiell Installation

If you have commissioned Axiell to install CalmView for you, you will need to carry out the steps below in preparation.

Please be aware that if the required Windows, IIS and .net 4.0 environments are not installed, configured and working (as described below) prior to the date of the scheduled CalmView installation it may result in the installation not being carried out and you being charged for the site visit.

Please note: Setting up and troubleshooting Microsoft IIS and Microsoft .net 4.0 framework are not supported by Axiell. Any advice required will need to be obtained from your server support team.

Preparing the development environment for a CalmView installation by Axiell staff

The development environment is an optional component. If you want a separate development environment for CalmView to test out changes before making them live, it can be anything from the desktop of a PC to a server, as long as it can run Internet Information Services manager (IIS) and the .net 4.0 framework and full administrator access can be provided to the Axiell member of staff carrying out the install.

Perform the following steps to create the development environment:

» Check the minimum requirements list for the development environment and install or upgrade any missing software.

Please note: If you are using IIS version 7 or above, you will need to install the IIS Console and other components to allow CalmView to be installed.

Please note: If you are running a 64bit version of Windows Server 2008, you will need to install the 32bit IIS environment alongside the 64bit one. Windows Server 2008 is able to run both environments together. This is not necessary for Windows Server 2012 or above.

» If IIS was installed after the .net framework, ensure that the .net framework is registered with IIS (see your server support team for instructions).

» Within IIS, allow ASP and .net applications to run.

Preparing the public-facing server for a CalmView installation by Axiell staff

» Check the minimum requirements list for the public-facing server and install or upgrade any missing software.

Please note: If you are using IIS version 7 or above, you will need to install the IIS Console and other components to allow CalmView to be installed.

Please note: If you are running a 64bit version of Windows Server 2008, you will need to install the 32bit IIS environment alongside the 64bit one. Windows Server 2008 is able to run both environments together. This is not necessary for Windows Server 2012 or above.

» If IIS was installed after the .net framework, ensure that the .net framework is registered with IIS (see your server support team for instructions).

» Within IIS, allow ASP and .net applications to run.

» In IIS, create a second website called **CalmViewBE** (stands for 'Back End') and allocate a TCP port that doesn't conflict with any other applications on this server.

Please note: It is advisable to have this port blocked from external access on your firewall.

» For this CalmViewBE website, set the home directory to the inetpub\wwwroot sub-folder on this machine. (This is the same as the default website).

You do not need to do anything else to prepare for Axiell installation of CalmView. The pages that follow only apply to organisations that are installing CalmView themselves.

Development Environment

The development environment is optional. It allows you an application administrator at your site to test out changes in CalmView before moving them to the live site. If used, a development environment for CalmView can be anything from the desktop of a PC to a server, as long as it can run Internet Information Services manager (IIS) and the .net 4.0 framework and you have full administrator access to it.

Please note: Setting up and troubleshooting Microsoft IIS and Microsoft .net 4.0 framework are not supported by Axiell, any advice required will need to be obtained from your server support team.

Perform the following steps to create the development environment:

Setting up the environment

>> Check the minimum requirements list for the development environment and install or upgrade any missing software.

Please note: If you are using IIS version 7 or above, you will need to install the IIS Console and other components to allow CalmView to be installed.

 Please note: If you are running a 64-bit version of Windows Server 2008, you will need to install the 32-bit IIS environment alongside the 64-bit one. Windows Server 2008 is able to run both environments together. This is not necessary for Windows Server 2012 or above.

>> If IIS was installed after the .net framework, ensure that the .net framework is registered with IIS (see your server support team for instructions).

>> Within IIS, allow ASP and .net applications to run.

Installing the Calm software and databases

>> Install the Server version of Calm from your installation CD. **Please note:** This must be the same version as Calm running on your current live server.

>> Ensure the DScribe Server/2 service is loaded and started.

>> Install the Client version of Calm from your installation CD.

>> Follow the instructions for copying your live Calm databases from your Calm server to this environment. This is the responsibility of your organisation.

Please note: It is very important that you build your CalmView website using your live copy of Calm data and not empty databases, as CalmView will pick up personalised settings from your databases (such as picklists and field labels).

>> Run the Calm client and enter the license key. Check that your Calm records have been copied successfully.

Installing CalmView

» Start to install CalmView from your installation CD.

» Enter the language you wish to install CalmView in.

» Enter the password (contact the Calm Helpdesk for this).

» When you are asked which CalmView features you wish to install, leave the defaults selected i.e. CalmView, Brokers, CalmBroker, Discovery (Core, which is greyed out) and CalmView Configurator ticked.

» On the pages that follow, leave the default settings for CalmView, CalmBroker, CalmViewStats and CalmViewConfig i.e. install them into the default website and the inetpub\wwwroot subfolder on this machine.

» Once the files have been installed, the Calm API Configuration window will pop up. Enter the version of Calm you are using, but do not change any of the other settings.

As well as CalmView itself, the Configurator, Statistics package and Broker will be installed on this machine. You are now ready to run CalmView and its Configurator using the following URLs:

CalmView Configurator http://localhost/CalmViewConfig/

CalmView http://localhost/CalmView

» Configure CalmView using the rest of this guide (unless you have made arrangements with Axiell to complete the configuration on your behalf).

» Run CalmView and perform relevant searches to check the filtering is correct, i.e. any records that you do not wish the public to view are not accessible.

Once configuration is complete, the next step is to set up the Public-facing Server.

Copying Database Files

Use the following procedure to copy database files from your Calm live server to your development environment or to your public-facing server. You will need a medium that will allow you to copy these files.

Please note: Prior to copying files from the development environment to the public-facing server, it is important to ensure that any records you do not wish the public to view meet your filtering criteria. To do this perform relevant searches on the development environment and check the results.

» Warn everyone logged onto a Calm client that they will need to exit Calm. This can be done using the 'Broadcast Message' option in the Admin utility.

» Once all users have exited Calm, stop the DScribe Server/2 service.

» Locate the DScribe folder on your Calm live server.

» Copy the **DScribe\Archive\Db** sub in its entirety to your chosen medium. Also, copy any folders that Calm saves files to. By default these are **DScribe\Images**, **DScribe\Docs**, and **DScribe\Archive\images**, but this can be changed in the Admin program.

» Open the **copied** version of the DScribe\Archive\Db sub-folder. If a sub-folder called 'Backup' exists here, delete it.

» Re-start the DScribe Server/2 service.

» Inform users that Calm can now be run again in the normal way.

On your destination machine (either your development environment or your public-facing server):

» Stop the DScribe Server/2 service.

» Locate the DScribe folder.

» Delete all files in the **DScribe\Archive\Db** sub-folder, as well as the other folders that you copied from, above, but leave the folders intact.

» Copy the live server files from your chosen medium to the corresponding empty sub-folders.

» Re-start the DScribe Server/2 service.

Public-facing Server

Please note: Setting up and troubleshooting Microsoft IIS and Microsoft .net 4.0 framework are not supported by Axiell, any advice required will need to be obtained from your server support team.

Perform the following steps to set up the public-facing server:

Setting up the environment

» Check the minimum requirements list for the public-facing server and install or upgrade any missing software.

Please note: If you are using IIS version 7 or above, you will need to install the IIS Console and other components to allow CalmView to be installed.

Please note: If you are running a 64bit version of Windows Server 2008, you will need to install the 32bit IIS environment alongside the 64bit one. Windows Server 2008 is able to run both environments together. This is not necessary for Windows Server 2012 or above.

» If IIS was installed after the .net framework, ensure that the .net framework is registered with IIS (see your server support team for instructions).

» Within IIS, allow ASP and .net applications to run.

» In IIS, create a second website called **CalmViewBE** (stands for 'Back End') and allocate a TCP port that doesn't conflict with any other applications on this server.

Please note: It is advisable to have this port blocked from external access on your firewall.

» For this CalmViewBE website, set the home directory to the inetpub\wwwroot sub-folder on this machine. (This is the same as the default website).

Installing the Calm software and databases

» Install the Server version of Calm from your installation CD. **Please note:** This must be the same version as Calm running on your current live server and as Calm running on your development environment.

» Ensure the DScribe Server/2 service is loaded and started.

» Install the Client version of Calm from your installation CD.

Please note: Prior to copying files from the development environment to the public-facing server, it is important to ensure that any records you do not wish the public to view meet your filtering criteria. To do this perform relevant searches on the development environment and check the results.

>> Follow the <u>instructions for copying your live Calm databases</u> from your Calm server to this machine. This is the responsibility of your organisation.

>> Run the Calm client and enter the license key. Check that your Calm records have been copied successfully.

Installing CalmView

>> Start to install CalmView from your installation CD.

>> Enter the language you wish to install CalmView in.

>> Enter the password (<u>contact the Calm Helpdesk</u> for this).

>> When you are asked which CalmView features you wish to install, remove the tick from 'CalmView Configurator' but leave the other defaults selected i.e. CalmView, Brokers, CalmBroker, Discovery (and Core, which is greyed out).
 It is very important that you do not install the CalmView Configurator onto this live public-facing server.

>> On the pages that follow, leave the default settings for the CalmView component, i.e. install it into the default website and the inetpub\wwwroot subfolder on this machine.

>> On the pages after that, where you install the other components (CalmBroker and CalmViewStats), choose the **CalmViewBE** website and leave the folder as the default setting i.e. the inetpub\wwwroot subfolder on this machine

By splitting the CalmView install in this way (using the default website and the CalmViewBE website) you are protecting your back-end CalmView components from unwanted public access.

>> Once the files have been installed, the Calm API Configuration window will pop up. Enter the version of Calm you are using, but do not change any of the other settings.

Moving CalmView from development

Use the following procedure to copy CalmView files from your development environment to your public-facing server. You will need a medium that will allow you to copy these files.

>> Locate the CalmView folder (usually inetpub\wwwroot\CalmView) on your development environment.

>> Copy this folder to your chosen portable medium.

>> Locate the CalmView folder (usually inetpub\wwwroot\CalmView) on your public-facing server.

>> Open this CalmView folder and delete all the files and folders located here. This is a very important step so that you don't have old files remaining.

>> Go back to the root of the wwwroot folder here on the public-facing server.

» Copy the CalmView folder from your portable medium to the root of the wwwroot folder overwriting the CalmView folder.

» Open this CalmView folder (on the public-facing server) and locate a file called **web.config**.

» Open **web.config** in a text editor such as Notepad or Textpad.

» Within **web.config**, locate the line that reads;

   <search broker="http://localhost/CalmBroker/DiscoveryBroker2.asmx">

» Carefully change the URL in this line to the URL of this file on your public-facing server. Based on the port you chose to run the CalmViewBE website on, the URL will look something like this:

   <search broker="http://localhost:10000/CalmBroker/DiscoveryBroker2.asmx">

» Still within **web.config**, next locate the line that reads;

   <file value="c:\inetpub\wwwroot\CalmViewStats\logs\General\dscovery.log" />

» Ensure this path states the correct location for the General\dscovery.log file. If not, correct it. If you are unsure of what the path should be, please contact the Calm Helpdesk.

» Next locate the line that reads;

   <file value="c:\inetpub\wwwroot\CalmViewStats\logs\Error\dscovery.log" />

» Ensure this path states the correct location for the Error\dscovery.log file. If not, correct it. If you are unsure of what the path should be, please contact the Calm Helpdesk.

» Finally, locate the line that reads;

   <file value="c:\inetpub\wwwroot\CalmViewStats\logs\CRecords\dscovery.log" />

» Ensure this path states the location for the CRecords\dscovery.log file. If not, correct it. If you are unsure of what the path should be, please contact the Calm Helpdesk.

» Once you are happy that the URL and the 3 file paths all point to the correct locations, save the **web.config** file.

You are now ready to run your live CalmView website using the following URLs:

http://localhost/CalmView on this server
http://ServerName/CalmView from another location on your network
http://www.domainname/CalmView over the internet

Making Changes

Changes to the configuration of CalmView: These changes should be made on the development environment, if present. Once complete, copy CalmView to the public-facing server again.

If you receive a new version of Calm: It is important that your Calm live server, development environment and public-facing server are all running the same version of Calm. The software should be upgraded (installed) on all three of these machines.

If you receive a new version of CalmView: It is important that your development environment and your public-facing server are running the same version of CalmView. The software should be upgraded (installed) on both these machines.

The Configurator

Where to run the Configurator

CalmView can be configured either on the public-facing server (in which case changes made may be seen instantly by members of the public) or on in an internal development environment that will later be transferred to a live server. Much of the configuration of CalmView is done using the Configurator. The Configurator will be installed automatically when you install CalmView.

Working with IIS

Whilst you are running the CalmView Configurator a Microsoft Internet Information Services (IIS) session is running. It is advisable to save changes on each page of the Configurator as you make them, as IIS will automatically time out a session if there is no activity and this could lead to you losing unsaved changes.

Getting started

To run the Configurator: Open a browser and enter the following URL:

<p align="center">http://localhost/CalmViewConfig</p>

The initial screen will appear, as shown:
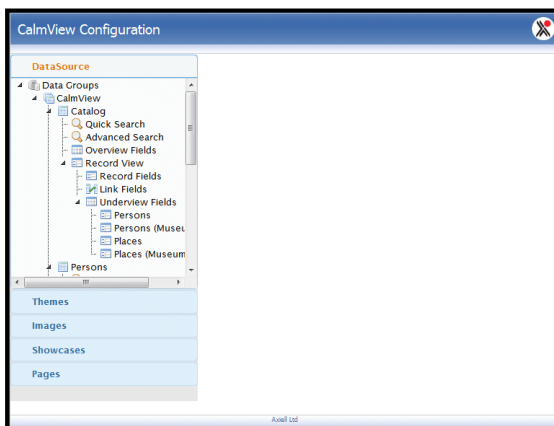
Using the Configurator

The CalmView settings which can be customised using the Configurator are divided into the following categories: DataSource, Themes, Images, Showcases, Linked Data, and Pages. These are shown as headings on the left hand side of the Configurator.

The next sections of this guide will explain the settings available under each heading and how they affect CalmView. Before making any customisations you must first select a theme.

DataSource

The DataSource section of the Configurator refers to the databases in Calm, where you have stored records you wish to display using CalmView.

You may enable users of your CalmView website to search the Calm databases of your choice (from Catalog, Persons and Places), using fields of your choice. There are two search modes, simple (called Quick Search in the Configurator) and advanced. You will be able to use filters to hide certain records from the public. The choice of which fields are displayed on the Overview, Record View, Quick Search and Advanced Search pages can be configured separately for each database (i.e. by data source), for example the search fields can be different when searching the catalogue compared to searching places. In the Configurator, you will see the options underneath each of the three database names; Catalog, Persons, Places. These are the settings that can be customised.

The options outlined in the next few pages help you to define how you wish the public to search and view your records.

Data Groups

This section of the Configurator contains settings for displaying maps within linked data. If a linked data object contains mapping co-ordinates, the XSLT stylesheet can use this information to display a map. **Please note:** Free mapping services may have strict usage limits.

When you choose the Data Groups option (at the top of the DataSource option) in the Configurator, the following screen will appear:
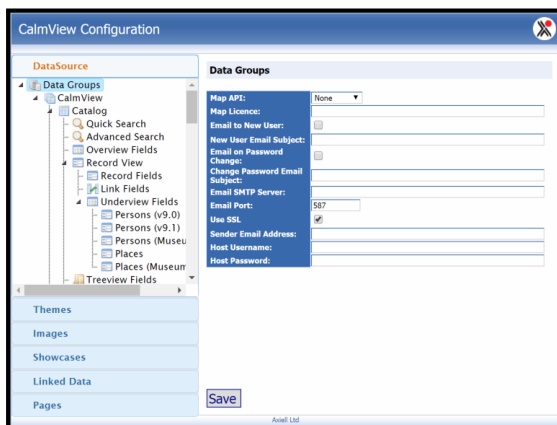
The following paragraphs describe the fields shown here, with some guidance for input.

Map API

Choose from the drop-down list of map providers and click the Save button.

Map Licence

Enter the licensing details associated with the map provider above, click the ⌷Save⌷ button.
Please note: Most mapping providers ask you to create an account to obtain a licence key.

All other options

All other options in this section are not currently in use in CalmView.

Per-Database Options

This section of the Configurator controls settings, such as what field is used to generate the tree, whether images are displayed, and how many search results are returned, on a database-by-database basis.

Each database that is available in your copy of CalmView has its own settings, accessed in the Configurator by opening DataSource > Data Groups > CalmView and then clicking the system name of the database (for example, Catalog).

When you choose the per-database option in the Configurator, a screen, as shown in this Catalog database example below, will appear:
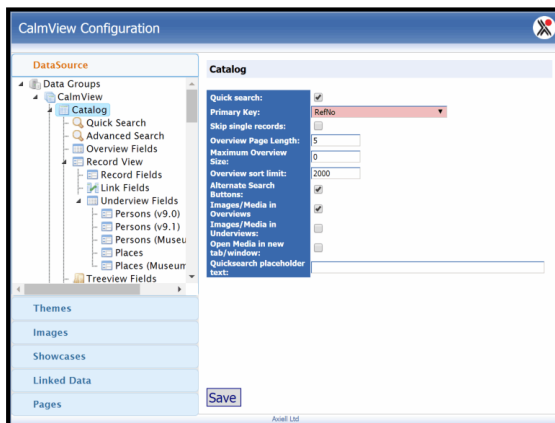
Quick search

If this option is selected, CalmView's Quick Search, which is in the top right of every CalmView page, will search this database. This option should only be selected for one database at a time: if you have it ticked for Catalog, check to make sure it is not ticked for any of the other databases in CalmView. More information about how to customise the Quick Search can be found here.

Primary Key

The field selected here is used by CalmView to generate the tree hierarchy. This varies depending on the database but in the Catalog database it is usually RefNo. If you have a collection with only museum records, you can instead choose ObjectNumber. However, it is not possible to have more than one primary key field per database, so if you have both archive and museum records, you will need to choose which field you would prefer to use for the tree.

To change the primary key, choose from the drop-down list of fields and click the Save button.

Skip single records

If this option is selected, a search that returns only one result will skip the overview and move directly to the record view.

Overview Page Length

This option determines the number of records shown per page in the overview. By default it is set to 5. Anyone searching in CalmView can change the number of in the overview, as well (the options are 5, 10, 20, 50, 100, All, and whatever is set as the Overview Page Length) but every time that person runs a new search CalmView will display a number of records equal to the Overview Page Length again. **Please note:** the fewer records that are returned per page, the quicker the user will be able to see them.

To set the Overview Page Length, enter the number of records you would like to be displayed after a search is run and click the Save button.

Maximum Overview Size

This option determines the maximum number of records that can be shown in the overview at one time. Anyone searching your copy of CalmView can change the number of records in the overview (the options are 5, 10, 20, 50, 100, All, and whatever is set as the Overview Page Length), but CalmView will not show any of these options that are larger than the Maximum Overview Size.

To set the Maximum Overview Size, enter the largest number of records you would like to be displayed in the overview at one time and click the Save button.

Overview sort limit

This makes a list of records un-sortable if there are more records in it than the Overview sort limit. Normally, a list of results in the overview can be sorted by any field which appears in the overview simply by clicking the column heading for that field. If the sort limit is set to 2000, for example, and a search returns 2311 results, none of the column headings will be clickable so that the user cannot sort the records.

To set the Overview sort limit, enter the maximum number of records you would like users to be able to sort by and click the Save button.

Alternate Search Buttons

This option has not been implemented in CalmView 5. It should be left unticked.

Images/Media in Overviews

If this option is selected, graphic and multimedia fields that appear in the overview will display thumbnails and can be clicked to open the files they are linked to. If this option is not selected, these fields will just display the filename that they are linked to.

Images/Media in Underviews

If this option is selected, graphic and multimedia fields that appear in the underview will display thumbnails and can be clicked to open the files they are linked to. For example, if a catalogue record is open in the record view and it is linked to a person record, the user will be able to see thumbnails of that person. If this option is not selected, these fields will just display the filename that they are linked to.

Open Media in new tab/window

If this option is selected, clicking a thumbnail in a graphic or multimedia field (in the overview, underview, or record view) will open that file in a new window. If this option is not selected, clicking a thumbnail will open the file in the same window that is currently open (so that the user will have to go back to return to where they had been).

Quicksearch placeholder text

Text in this box will be displayed in grey in the Quick Search box before a user enters a search, as shown below. This can be used to encourage researchers to use the simple search or suggest how they might use it.
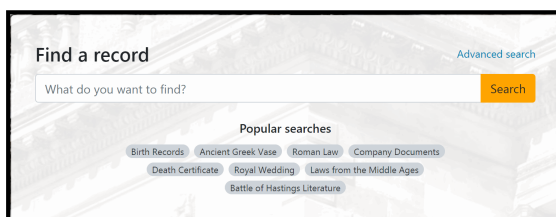
To set placeholder text, enter what you would like to appear in the Quick Search box and click the `Save` button.

Quick Search

This is the simple search, it is accessed via the "Google style" search box at the top of the home page:
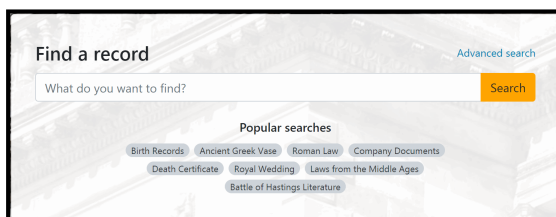
To perform a simple search, users type one or more search terms into the search box and click the Search button.

The simple search is designed to search one database at a time; either Catalog, Persons or Places. The Catalog database is searched by default, but you can select one of the other databases using the Configurator.
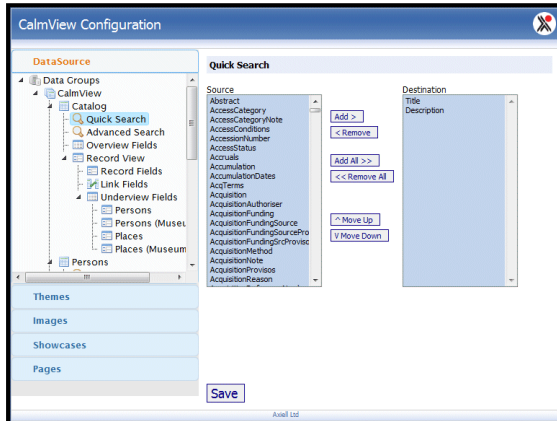
To select a database for the simple search:

» In the Configurator, select Datasource, DataGroups, CalmView, followed by the name of the database you require, for example Persons or Places

» Tick the 'Quick search' option in the right hand pane

» Click the Save button

Please note: When changing the database for the simple search, you must also deselect the previously set database. For example, remove the tick from the Quick search option under Catalog if you wish to activate the simple search for the Persons or Places database.

The fields searched by default are; Title and Description in the Catalog database, PersonName in the Persons database and PlaceName, Code and Set in the Places database. It is possible to configure the simple search to search different fields, however it is recommended that only 2 or 3 fields are used for simple searches; adding more fields may affect the speed of search performance.

When you choose the Quick Search option in the Configurator, a screen as shown in this Catalog database example will appear:

Fields shown in the 'Destination' list are the ones already included in the simple search for this database. Fields shown in the 'Source' list are available to add.

To add a field to the Quick Search:

» Highlight the field in the Source list

» Click the Add > button

» Click the Save button

You will see that the field moves to the Destination list, it will now be included in the Quick Search.

To remove a field from the Quick Search:

» Highlight the field in the Destination list

» Click the < Remove button

» Click the Save button

You will see that the field moves to the Source list, it will no longer be included in the Quick Search.

The fields searched on during simple searching should be fields that you have chosen to display as part of your full record view. We recommend choosing commonly used fields such as Title or Description in the Catalog database.
Please note: You should not add 'Any text' to this search as that could make CalmView search fields that you haven't chosen to display.
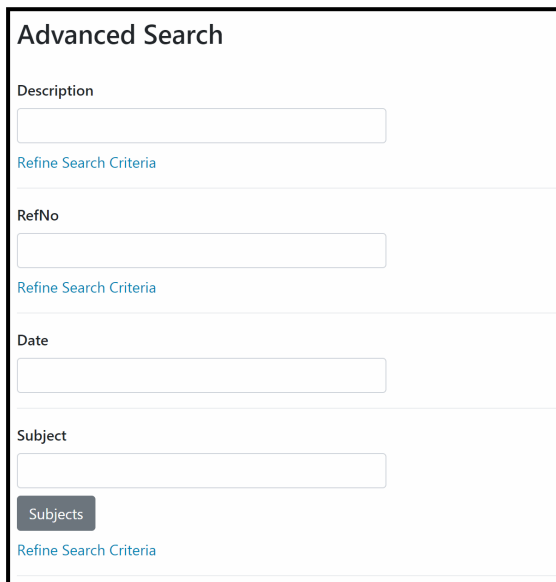
Do not add any date fields to this search, it is intended as a simple text search only.
Adding a date field to the list of text fields here (to be searched) would give unpredictable search results. If you need to search on a date field, the Advanced Search is the correct place to add this.

More options for editing the Quick Search are available in Per-Database Options.

Advanced Search

The advanced searching option is accessible from a CalmView page by selecting the Search button in the top toolbar, or by clicking Refine Search at the top of a list of search results. It gives the user the ability to search on specific, defined fields, as shown below:

Advanced Search

Description

Refine Search Criteria

RefNo

Refine Search Criteria

Date

Subject

Subjects

Refine Search Criteria

Databases to be searched

The advanced search button is a drop-down menu. Clicking the triangle to the left of the word 'Advanced' will extend the advanced search menu to display the databases available for advanced searching.

CalmView is supplied with all three databases included in the Advanced Search i.e. Catalogue, Persons and Places.

Advanced search fields

When you choose the Advanced Search option in the Configurator, a screen (as shown in this Catalog database example) will appear:
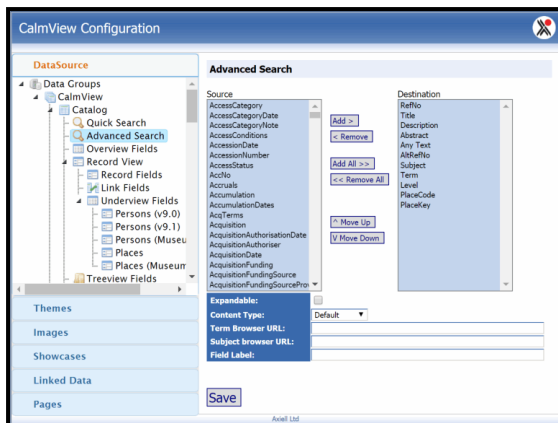
The Advanced Search enables searching on any text field (if required) and any other field (s). Fields shown in the 'Destination' list are the ones already included in the Advanced Search for this database. Fields shown in the 'Source' list are available to add.

To add a field to the Advanced Search:

>> Highlight the field in the Source list

>> Click the Add > button

>> Click the Save button

You will see that the field moves to the Destination list, it will now be included in the Advanced Search dialogue.

To remove a field from the Advanced Search:

>> Highlight the field in the Destination list

>> Click the < Remove button

>> Click the Save button

You will see that the field moves to the Source list, it will no longer be included in the Advanced Search dialogue.

To change the order of fields on the Advanced Search dialogue:

>> Highlight a field in the Destination list

>> Click on the ^ Move Up or V Move Down button. You will notice the field has changed position

>> Repeat with this field and with other fields until the desired order is achieved

>> Click the Save button

Fields in the Destination list will appear in this order on the Advanced Search page.

It is possible to define attributes for the fields you have chosen to display in the Advanced Search dialogue. The following paragraphs describe the options which are located underneath the destination and source lists, with some guidance for input.

Expandable

A standard Advanced Search will search for all the words a user has entered. If the **Expandable** option is selected in the Configurator, the phrase "Refine search criteria" will appear below a field's name in the Advanced Search. If a user clicks Refine Search

Criteria, extra boolean search boxes will appear below the field's name, as shown below. These are:

RefNo

With all the words

[   ]

With at least one of the words

[   ]

Without the words

[   ]

Within the collection

[   ]

Standard Search Criteria

» **With all of the words**: find entries containing all of the search words entered

» **With at least one of the words**: find entries containing any of the search words entered

» **Without the words**: find only entries that don't contain the search words entered

» **Within the collection**: find entries hierarchically below the entered search term. This should be enabled only for hierarchical fields like RefNo so that a user can enter a RefNo and see all records below that RefNo (much like if the user had added /* to the end of the RefNo when searching in Calm). **Please note:** this only appears if a field is identified as a Hierarchical field in Content Type, discussed below

Content Type

 This option should only be used if you would like users to be able to use the "Within the collection" option on the Advanced Search, discussed above. Content Type is set to "Default" for all fields. If a field is hierarchical (like RefNo) and you would like a user to be able to use the "Within" search, instead set this to "Hierarchical" for that field and click the Save button.

## Term Browser URL

The Advanced Search page in CalmView can show a Term field entry box, with a link to a Term Browser (shown as a Terms button to the right of the field). If you have populated the Terms thesaurus in Calm, you can use this browser to enable your users to search by Term. A user can type a Term into the Term field entry box, then click Terms to browse the thesaurus, select a Term and return it to the Advanced Search page.

The Term Browser URL section in the Configurator determines whether the default browser (as described above), or your own Term browser, is run when a user presses the Terms link.

The default CalmView browser is a file called termbrowser.aspx. To use this default browser, select the Term field and enter termbrowser.aspx in the Term Browser URL field. If you wish to use your own Term Browser, enter the URL or name of the aspx file here. **Please note:** You will need to include the path to the aspx file if it is not stored in the CalmView folder.

Subject Browser URL

The Advanced Search page in CalmView can show a Subject field entry box, with a link to a Subject Browser (shown as a Subjects button to the right of the field). If you have populated the Subjects thesaurus in Calm, you can use this browser to enable your users to search by Subject. A user can type a Subject into the Subject field entry box, then click Subjects to browse the thesaurus, select a Subject and return it to the Advanced Search page.

The Subject Browser URL section in the Configurator determines whether the default browser (as described above), or your own Subject browser, is run when a user presses the Subjects link.

The default CalmView browser is a file called subjectbrowser.aspx. To use this default browser, select the Term field and enter subjectbrowser.aspx in the Term Browser URL field. If you wish to use your own Subject Browser, enter the URL or name of the aspx file here. **Please note:** You will need to include the path to the aspx file if it is not stored in the CalmView folder.

Field Label

The Field Label option in the Configurator is used if you wish to re-label a field to change its name. The text entered here will appear instead of the original name on the Advanced Search page. If you do not enter a label here, the original field name will be displayed on the Advanced Search page. Any label entered here can contain spaces. Field labels can be different from the ones used in Calm itself.

Search Filters

There may be records in your Calm databases that you do not wish to show in the search results. Records may be "hidden" by applying search filters. Filters work by excluding records with certain content in certain fields, or by only including records with certain content in certain fields.

An example of a search filter for the Catalog database is:

"(CatalogueStatus='Catalogued')&(AccessStatus='Open')"

In this example a record MUST have "Catalogued" in the CatalogueStatus field and have "Open" in the AccessStatus field. If either is not present, the record will never be shown regardless of what is searched for.

To add a search filter:

You will need to manually edit the file called DatabaseList.xml in the Calm Broker folder (usually C:\inetpub\wwwroot\CalmBroker). Add the search filter underneath the relevant database, using correct xml formatting.

For example, to use the search filter mentioned above, you would add the line:

<SearchFilter>(AccessStatus=open) & (CatalogueStatus=catalogued)</SearchFilter>

in the section of lines underneath:

<Database Name="Catalog">

Any Text Search

One of the search options that you can enable for the Advanced Search is "Any Text", which allows a user to search multiple text fields at once (much like the "Any Text Field" search in Calm itself.

To set which fields CalmView searches with Any Text:

- » Open Calm's Admin program
- » Click **File**
- » Click **Open...**
- » Click on the name of the database you wish to choose Any Text fields for (for example, Catalog)
- » Click **OK**
- » Click **Field**
- » Click **Hide/Show in OPAC...** and a dialogue box will open
- » Any field that you would like Any Text to search should be on the left, and any field you would not like it to search should be on the right
- » Use the `<< Show` and `Hide >>` buttons to move selected fields left and right
- » Click **OK**

Overview Fields

After a successful search is performed, the search results will be presented in an overview table, as shown in this example:

The fields (columns) and the field order for this search result view can be customised. We recommend that 3 or 4 fields are used. It is ideal to use fields which have been completed in all your records, to avoid gaps in the results overview.

Graphic fields such as "Thumbnail" may be used in the overview if required. To do this, Images/Media in Overviews must be selected in the per-database options of the database you wish to display images in the overview for. If a graphic field appears in the overview but a record is not linked to an image, the field for that record will display the text 'No Image Available'.

Please be aware that if text-wrapping fields containing large amounts of data are chosen, they may create long columns of text in the result view.

When you choose the Overview Fields option in the Configurator, a screen as shown in this Catalog database example, will appear:
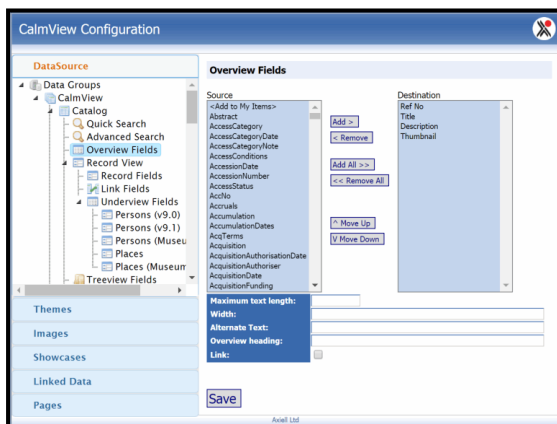
Fields shown in the 'Destination' list are the ones already included in the Overview for this database. Fields shown in the 'Source' list are available to add.

To add a field to the Overview:

» Highlight the field in the Source list

» Click the Add > button

» Click the Save button

You will see that the field moves to the Destination list, it will now be included in the search results overview.

To remove a field from the Overview:

» Highlight the field in the Destination list

» Click the `< Remove` button

» Click the `Save` button

You will see that the field moves to the Source list, it will no longer be included in the search results overview.

To change the order of fields/columns in the Overview:

Fields shown in the destination list will appear as columns in the Overview, from the top of the list to the foot will appear from the left of the Overview table to the right.

» Highlight a field in the Destination list

» Click on the `^ Move Up` or `v Move Down` button. You will notice the field has changed position

» Repeat with this field and with other fields until the desired order is achieved

» Click the `Save` button

It is possible to define attributes for the fields you have chosen to display in the Overview. The following paragraphs describe the options which are located underneath the destination and source lists, with some guidance for input.

Maximum text length

The Maximum text length option in the Configurator is used to define the amount of text, in characters, that will be displayed under a column in the overview. For example, if you set a character length of 100, only the first 100 characters of field content will be displayed. Where the field content is longer than the specified number of characters the text will be cut off with an ellipsis (...) to indicate that there is further content in the field.

» Highlight a field in the Destination list

» Enter a number in the Maximum text length field.

» Click the `Save` button

Width

The Width option in the Configurator is used to enter the width of a column in the search results Overview.

» Highlight a field in the Destination list

» Enter a number followed by the unit. You can use any units that are valid in CSS, for example % (percentage of total table width) or pixels.

» Click the `Save` button

Alternate Text

This option is not currently in use.

Overview heading

The Overview heading option in the Configurator is used if you wish to rename a column heading in the search results Overview.

» Highlight a field in the Destination list

» Type the alternative heading in the Overview heading box, the text entered here will appear above field contents in the Overview.

» Click the `Save` button

If you do not enter an alternative heading, the original field name (as displayed in the Destination list) will be displayed as the column heading in the Overview.

Link

By default, you can click on any field in a row of the search results Overview in CalmView to show the full record. However if someone is using CalmView with an accessibility reader and Javascript has to be turned off, you will need to choose fields in the Configurator to set as links to the full record.

» Highlight a field in the Destination list

» Click on the Link checkbox to tick it

» Click the `Save` button

Please note: If the primary key field (for example RefNo in the Catalog database) is present as a column in the Overview this will automatically become the link (to the full record view) regardless of any settings you have made in the Configurator.

Record View

The record view is a full screen view of your Calm record, as shown:
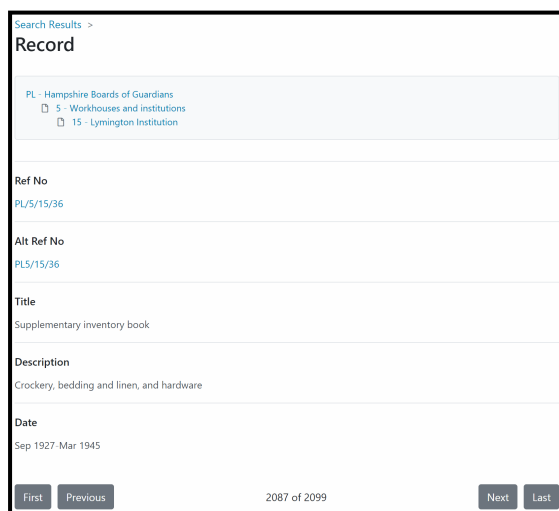
The record view is displayed after a user selects a record from the search result view (the Overview). The record view will contain those fields which you have selected to display in CalmView (see below).

Blank Fields

If a record contains empty fields, these will not be displayed in the record view.

Multimedia/Graphic Fields

The full record view can include multimedia or graphic fields. These are presented as thumbnails or icons, dependent on the type of media. These may be clicked to display the full sized version of an image or to open other types of file using the locally associated software. You can set whether clicked images are opened in a new tab/window or the existing window in the Per-Database Options.

Images may be "watermarked" to protect your copyright, as described in Images.

Choosing an Option

The fields displayed as part of the full record view, and the order in which those fields are displayed can be customised. If you wish to alter the order or behaviour of fields in general, open Record Fields. If you are not displaying links between records in different databases on CalmView, Record Fields is the only option you will need. To change how fields link to other databases, open Link Fields. Finally, you can control what is displayed on a record from other databases it is linked to in Underview Fields.

Record Fields

When you choose the Record Fields option in the Configurator, a screen will be displayed:
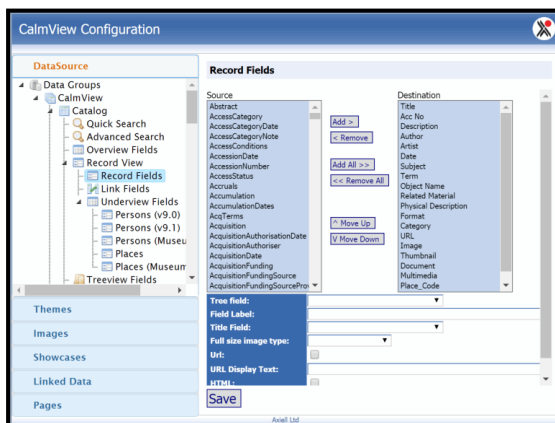
Please note: You may have to scroll down to see every option in the Configurator.

Fields shown in the 'Destination' list are the ones already included in the Record View for this database. Fields shown in the 'Source' list are available to add.

To add a field to the Record View:

>> Highlight the field in the Source list

>> Click the `Add >` button

>> Click the `Save` button

You will see that the field moves to the Destination list, it will now be included in the record view.

To remove a field from the Record View:

>> Highlight the field in the Destination list

>> Click the `< Remove` button

>> Click the `Save` button

You will see that the field moves to the Source list, it will no longer be included in the record view.

To change the order of fields in the Record View:

>> Highlight a field in the Destination list

>> Click on the `^ Move Up` or `V Move Down` button. You will notice the field has changed position

>> Repeat with this field and with other fields until the desired order is achieved

>> Click the `Save` button

It is possible to define attributes for the fields you have chosen to display in the record view. The following paragraphs describe the options which are located underneath the destination and source lists, with some guidance for input.

Tree field

By default, a field like RefNo can be clicked on the record view to see the hierarchy browser. However, you can make any field link to the Hierarchy Browser using 'Tree field'. To do this:

>> Highlight a field in the Destination list that you would like to link to the Hierarchy Browser

>> Click on the arrow to the right of 'Tree field'

>> Click on the name of the primary key field (used to generate the tree)

>> Click the `Save` button

More than one field can be made to link to the tree. If you instead want to change the field that is used to generate the tree, see the Per-Database Options page.

Field Label

You may wish to re-label a field in CalmView, perhaps to show a more 'user-friendly' field name to the public. In order to do this, use the Field Label option in the Configurator. The text entered here will appear next to the field in the Record View. If you do not enter a label here, the original field name will be displayed. Field labels in CalmView can be different from those in Calm, and may contain spaces if required.

Title Field

You may decide to include Multimedia or Graphic fields in your record view. These fields will ordinarily display images or media files from your Calm database. However you may wish to select a secondary field, the contents of which will be displayed as alternative text, for example if a user is using a 'reader' to make your site accessible for blind or partially sighted people.

If you wish to set an alternative field, highlight the field in question in the 'Destination' list and select the name of the alternative field in the Title Field drop-down list.

Full size image type

When a reader of your CalmView website looks at a full record view, they can click on the thumbnail of any of the images displayed to view a full sized version.

Choose 'default', 'GalleryThumbnail', 'OverviewThumbnail', or 'RecordThumbnail' from the drop-down list here to determine which image settings will apply to the image. These settings can be viewed and edited in the Images section of the Configurator.

Url

If this option is selected, the contents of this field will be treated as a URL and when clicked will take the user to the specified page. This should only be used if the field always contains a URL in your data. If its contents are not a valid URL, clicking them will open a 404 error page for the user.

Please note: do not tick the Url box for a field and also set it to link to the tree using Tree field. Only one of these options should be used for a field.

URL Display Text

If the URL option is selected for a field, text entered here will be displayed instead of each URL in that field. For example, you may wish to enter 'Click here to buy a copy of this in our online store.'

To set display text, enter the text in this field and click the Save button.

HTML

If this option is selected for a field, any HTML code entered for that field will be rendered correctly. For example, Contact us. will display as Contact us.

Link Fields

Link Fields are the fields on your Calm records which are used to link records in different databases together. For example the PersonCode field in a catalogue record will link that catalogue record to a record in the Persons database.

When you choose the Link Fields option in the Configurator, a screen will appear:
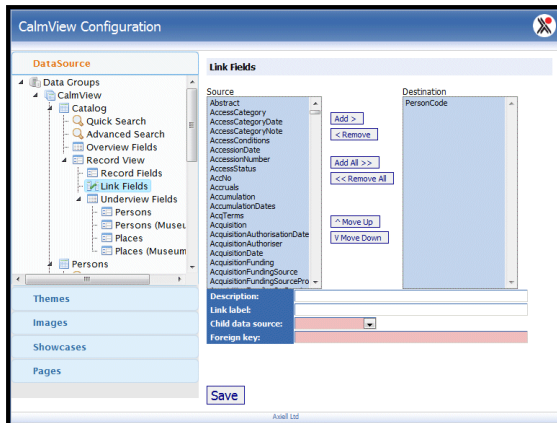
The fields you may use as link fields are limited to those that are used as link fields in Calm. Link Fields can be added, removed and their order changed in exactly the same way as Record Fields, described here.

You may set criteria to facilitate the viewing of linked records. The following paragraphs describe the options which are located underneath the destination and source lists, with some guidance for input. Fields highlighted in red in the Configurator are mandatory.

Description

You may wish to set some text to appear on your Catalogue record to act as a link to the Person or Place records. Text you enter here will appear as the link, your users can click the link to navigate to the linked records.

Link label

You may wish to re-label the link. The text entered here will appear in the Destination box when you save it. This label is not displayed in CalmView, it is purely used in the Configurator. If you do not enter a label here, the original field name will be used as the link name.

Child data source

The child data source is the database in which your linked records are stored. Choose CalmView.Persons or CalmView.Places from the drop-down list, depending on which database you wish the selected field to link to.

Foreign key

When Calm records are linked to records in other databases, the contents of a unique code field are used to link the records together. For example when you link a Catalogue record to a Person record the code is displayed in the catalogue record in a field called PersonCode and in the Person record in a field called Code.

The foreign key is the name of the reciprocal linking field in the linked records. Enter **Code** for either the Persons database or the Places database, for example.

Underview Fields

Underview fields are shown on a record view page beneath the other fields in a record, as a table. They show fields from a linked record in another database, for example the Persons database.

When you choose the Underview Fields option in the Configurator, then select a database, a screen as shown in the following Persons database examples, will appear:
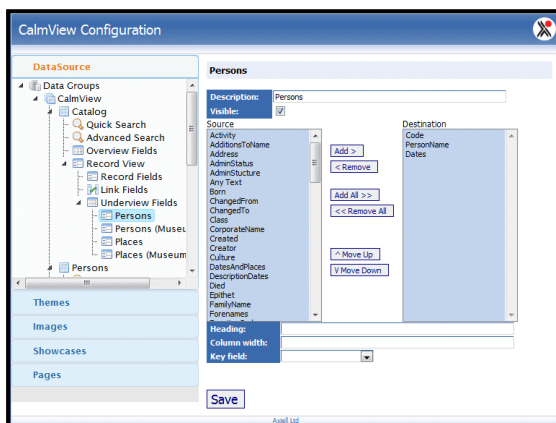
Two pages are shown for each database, the first one is to configure Underview fields for Archive record types, the second is to configure Underview fields for Museum record types.

Underview Fields can be added, removed and their order changed in exactly the same way as Record Fields, described here.

The following paragraphs describe the options shown underneath the destination and source lists, with some guidance for input.

Heading

This is the column heading for the selected field in the Underview. If you leave this field blank the field label (or normal field name) will be used.

Column width

This is the width of the column for the selected field in the Underview. The number entered here should be a percentage of the total Underview table width.

Key field

When Calm records are linked to records in other databases, the contents of a unique code field are used to link the records together. For example when you link a Catalogue record to a Person record the code is displayed in the catalogue record in a field called PersonCode and in the Person record in a field called Code.
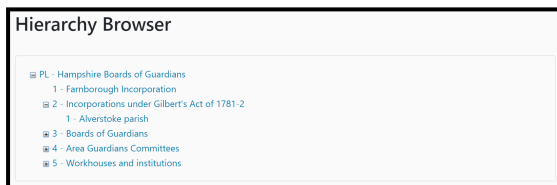
The foreign key is the name of the reciprocal linking field in the linked records. Enter **Code** for either the Persons database or the Places database.

Treeview Fields

Calm records usually exist in a hierarchy. CalmView allows this hierarchy to be viewed both above the details of a record in the Record View:
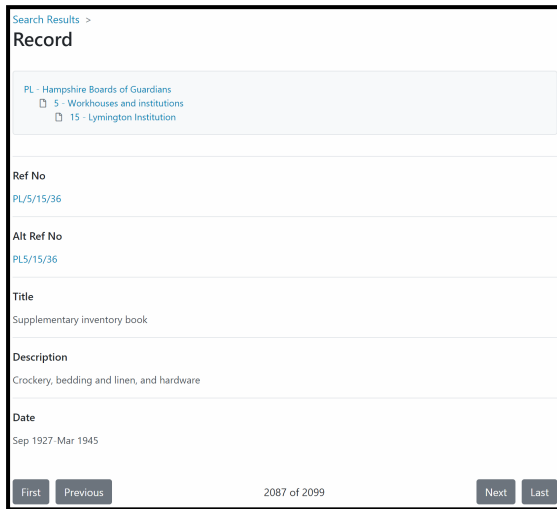

...and also in a separate Hierarchy Browser:

CalmView generates this hierarchy from the primary key (which is RefNo, by default, in the archive Catalogue). This key can be changed for each database in CalmView's Per-Database Options. The primary key is always displayed in the hierarchy, and it always comes first. Apart from that, the fields that appear in the hierarchy and their order can be changed in the Configurator's Treeview Fields option.

When you choose the Treeview Fields option in the Configurator, a screen as shown in this Catalog database example will appear:
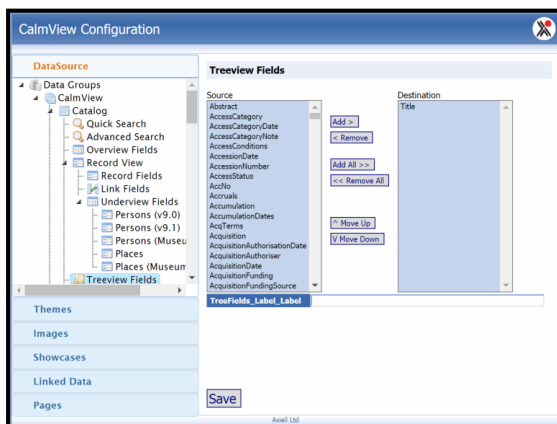
Fields shown in the 'Destination' list are the ones already included in the hierarchy views for this database. Fields shown in the 'Source' list are available to add.

To add a field to the hierarchy view:

» Highlight the field in the Source list

» Click the Add > button

» Click the Save button

You will see that the field moves to the Destination list, it will now be included in the hierarchy view.

To remove a field from the hierarchy view:

» Highlight the field in the Destination list

» Click the < Remove button

» Click the Save button

You will see that the field moves to the Source list, it will no longer be included in the hierarchy view.

To change the order of fields/columns in the hierarchy view:

Fields shown in the Destination list will appear in the hierarchy view, with the top field appearing first and the bottom field appearing last.

» Highlight a field in the Destination list

» Click on the ^ Move Up or v Move Down button. You will notice the field has changed position

» Repeat with this field and with other fields until the desired order is achieved

» Click the Save button

Please note: The 'TreeFields_Label_Label' field below the Source and Destination columns is currently not in use. Please do not add data to it in your version of CalmView.

My Items

As document ordering is not currently implemented for CalmView 5, this section of the Configurator is not in use.

Themes

Themes control colours, page layouts, and other display elements on a CalmView site. Each of the different pages in CalmView will be displayed according to your chosen theme. The actual content of the site is edited elsewhere.

Most organisations will have a theme created for them by Axiell. If this is the case for your organisation, you will not need to touch the Themes section of the Configurator.

If your organisation has not had a custom theme built, the Configurator can be used to choose between any built-in themes and your own custom theme, usually referred to as the 'Customer' theme. There are two design themes available in CalmView, called 'Default' and 'Theme_Dark' that are not organisation-specific. To choose a theme, the dot must be in the radio button below the theme (as in the screenshot below, where 'Default' is selected).
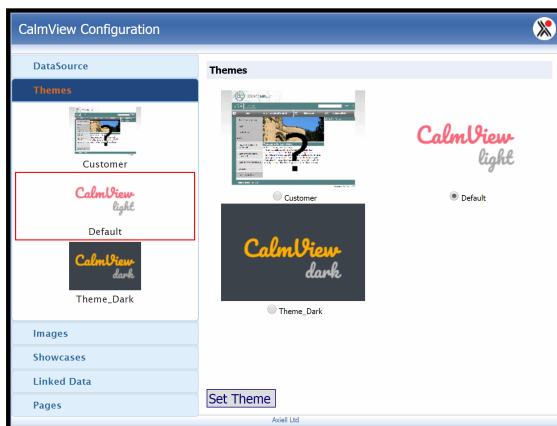
Images

The Images parameters enable you to create display settings such as height, width and watermarks for your full size images and any thumbnail images displayed in the images gallery and on your records.

To set image parameters:

» Click the Images option in the left hand menu of the Configurator.

» Click the CalmView Images option, the image options are displayed in the right hand pane.

Options may be set for 'default', 'gallery thumbnail', 'overview thumbnail', and 'record thumbnail' images:

» **Default:** When a thumbnail image is displayed as part of a full record view it may be clicked on to open a full size version of the image. The 'default' settings apply to this full size image.

» **Gallery Thumbnail:** The thumbnail images displayed in the image gallery

» **Overview Thumbnail:** The thumbnail images displayed in the overview and underview

» **Record Thumbnail:** The thumbnail images displayed in the full record view

Please note: you must set the image options individually for each of the four 'types' of image listed above.

First select the type of image you wish to set parameters for, then set the parameters as follows:

Cached

This parameter is displayed as a tick box and defines whether images are 'built' once and stored in a cache for quick access or 'built' each time they are viewed. If the images are to be cached then you need to define a folder in which to store them. This must be done manually in the CalmView\web.config file (using a text editor), for example to have your images cached on your C: drive in a folder called ImageCache, add the line:
<add key="ImageCacheDir" value="c:\ImageCache" />
 to the <appSettings> section of the web.config file.

Please note: if you decide to alter images which have been cached, you will need to delete the cached versions of the images to see your changes.

Vertical Alignment and Horizontal Alignment

These parameters refer to the alignment of any watermark text that you may set for your images. The watermark text is set in the parameter below. Select the alignment you require using the drop down menu options provided.

Recompress output

It is possible to set modifications for your images, such as height, width and watermarking (see below). If you do not set modifications for your images they will be displayed as they are, without being compressed. This may be undesirable, for example if your image is a large Tiff file, however if this parameter is ticked the image will be compressed.

Output quality

This parameter is displayed as a percentage, for example 100 = 100%. It is specific to file types which allow quality settings, such as .jpg, .gif and .png files.

Output Format

This parameter is displayed as a drop down picklist; select the appropriate output format for your images from the options available.

Maintain Aspect Ratio

If checked then this parameter will retain the original shape of your images, not distorting them if they do not conform to the specified height and width.

Height and Width

The height and width in pixels for your images. Please note that if no height and width are selected then there is no modification of the image.

Maintain Watermark Aspect Ratio

If checked then this parameter will retain the original shape of your watermark image (see watermark file below), when it is displayed with your images.

Watermark File

You may choose to create a transparent watermark image to be displayed 'over' your images. Specify the full filename of your watermark image here (it must be a Portable Network Graphic type; with the extension png) and place the file in the CalmView Configuration folder (usually C:\Inetpub\wwwroot\CalmView\Configuration). **Please note:** you should use a photo editor to create a transparent file to use as a watermark.

Watermark Text

In addition to, or instead of, using a watermark image you may set some watermark text to display 'over' your images. Type the text you require here.

Use Original Image File?

If this box is ticked, CalmView will ignore the above settings (including resizing, format changing, and watermarking) and display the original image file.

Showcases

CalmView contains 2 "showcase" options designed to enable you to highlight sections of your collection:

» **Record Showcase:** highlights records on a Showcase page, and also can display a random selection of those records on the main page (as part of the What's New section) and beside search results in the sidebar.

» **Image Gallery:** highlights records with images attached in a choice of 2 views. These records are only displayed on the Image Gallery page and are not part of the What's New section

Use the options below to customise the showcase options.

CalmView previously had a third section, called What's New, displayed on the front page. What's New now simply pulls through records from the Showcase, so records do not need to be specially chosen for it and configuration options for it in the Configurator can be ignored.
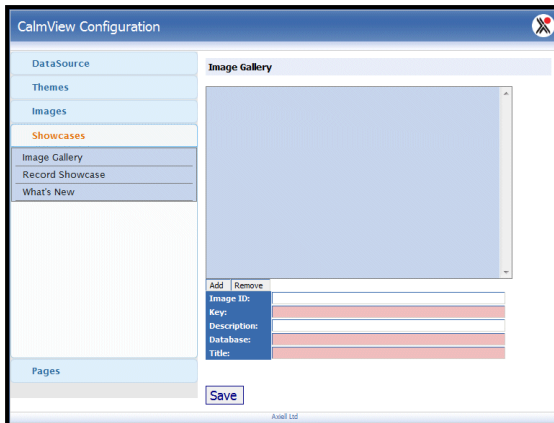
Image Gallery

The Image Gallery is a feature that enables you to display a selected group of records with images attached to them. For example, you may wish to make a small 'online exhibition' or to feature records of particular interest to visitors.

Users of your CalmView site will be able to choose to view your Image Gallery in List or Gallery mode. List mode is shown below:
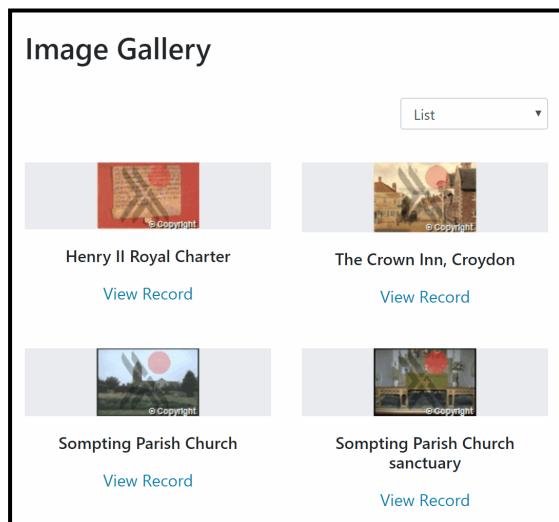
When you choose the Image Gallery option (underneath Showcases) in the Configurator, a screen, as shown in this example, will appear:

To add a record to the Image Gallery

» Open the Showcases section in the Configurator and then Image Gallery

» Click Add and a line reading 'New Item' will appear in the box above

» Click 'New Item' in the box above. You may have to click it and then use the up and down arrow keys on your keyboard to select it

» Enter information in the fields as discussed below. Fields highlighted in red in the Configurator are mandatory

» Press Save to save the changes

Image Id

The field which links to images on your Calm records will contain the filename, and perhaps some elements of the path, for the images they display. You may have to press F9 in Calm to display this data. The ImageId field in CalmView should display the same content for those images you wish to showcase.

Key

The contents of the RefNo field from the Calm catalogue record that you wish to showcase.

Description

Text you enter here will be displayed in the list of records in the Image Gallery.

Database

The system name for the Calm database that contains the record you wish to showcase (the same name used in the Admin program). In the Image Gallery the Catalogue database is the only one which may be used. **Please note:** the catalogue database is called Catalog and this spelling should be used here.

Title

Text here will be displayed alongside the image.

Record Showcase

The Record Showcase allows you to highlight a selection of records that might interest visitors to your CalmView site. Showcase records are served up to visitors on the home page, in the sidebar when a visitor is looking at search results or other pages, and can be viewed on their own Record Showcase page (shown below).
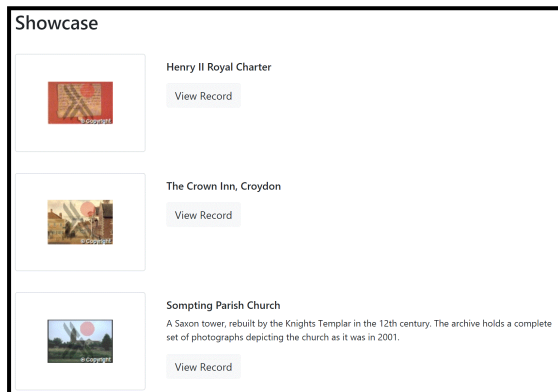
When you choose the Record Showcase option (underneath Showcases) in the Configurator, a screen, as shown in this example, will appear:
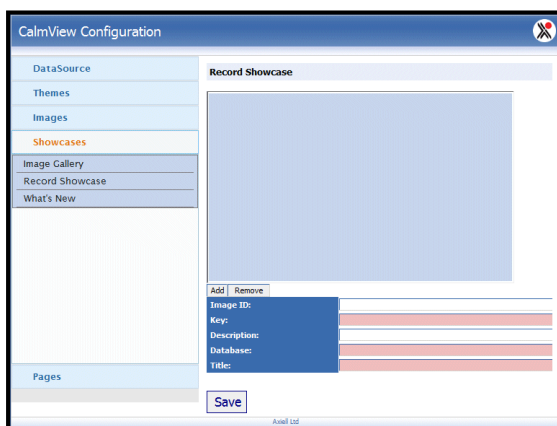
To add a record to the Showcase

» Open the Showcases section in the Configurator and then Record Showcase

» Click [Add] and a line reading 'New Item' will appear in the box above

» Click 'New Item' in the box above. You may have to click it and then use the up and down arrow keys on your keyboard to select it

» Enter information in the fields as discussed below. Fields highlighted in red in the Configurator are mandatory

» Press [Save] to save the changes

Image Id

The field which links to images on your Calm records will contain the filename, and perhaps some elements of the path, for the images they display. You may have to press F9 in Calm to display this data. The ImageId field in CalmView should display the same content for those images you wish to showcase.

Key

The contents of the RefNo field from the Calm catalogue record that you wish to showcase.

Description

Text you enter here will be displayed in the list of records in the showcase.

Database

The system name for the Calm database that contains the record you wish to showcase (the same name used in the Admin program). In the records showcase the Catalogue database is the only one which may be used. **Please note:** the catalogue database is called Catalog and this spelling should be used here.

Title

Text here will be displayed alongside the image wherever this record is displayed.

What's New

This section is no longer in use in CalmView. 'What's New' now refers to the section on the home page which shows records from the Record Showcase.

Linked Data

There is a linked data feature in Calm which enables you to search data from external sources and add it into fields on your Calm records. Each data source has to be configured so that Calm can request data and recognise the format it is returned in. New data sources can be added, existing ones can be edited or deleted.

External data linked to your Calm records can be published over the web using CalmView, just like the rest of the data in your Calm records. Each link consists of a text description, the relationship type (for example organisation, person, or concept), and the URL for the data in RDF/XML format. In CalmView, with a record on screen, any external data linked to that particular record will be shown in a panel on the right hand side.

Clicking on links in the linked data panel, will tell CalmView to display the content.

Linked data settings are available in the CalmView Configurator, underneath 'Linked Data'. For more information about how to configure them, see Data Sources and Groups.

Data Sources

All data sources that will be linked to your Calm records and displayed on a CalmView record screen need to be added to this section. When you choose the Data Sources option (underneath Linked Data) in the Configurator, a screen as shown in this example of the AIM25 data source, will appear:
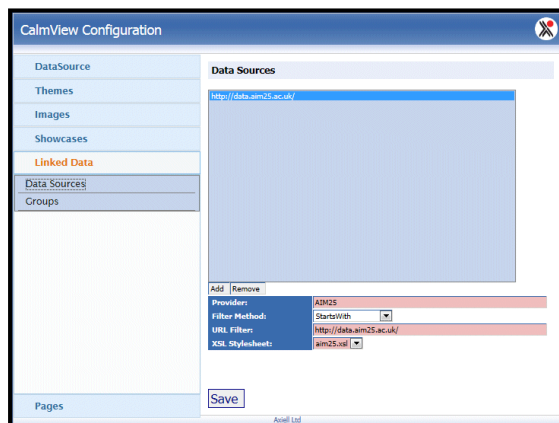
Data sources are identified by their URL, this is shown in the top entry box (in the example screen this is 'http://data.aim25.ac.uk/'). For each data source, various attributes are available. The following paragraphs describe the attributes shown, with some guidance for input. Fields highlighted in red in the Configurator are mandatory.

Provider

The name of the provider, this is shown on the record screen in CalmView, at the top of the linked data panel. In the example above, the provider is 'AIM25'.

Filter Method

This is used in conjunction with URL Filter below. From the dropdown box, choose 'Starts With' or 'Regular Expression', depending on the URLs you wish to match with.

URL Filter

This is used in conjunction with the Filter Method above.

For example, the AIM25 data source uses a 'Starts With' entry, which is 'http://data.aim25.ac.uk/'.

Regular expressions are pieces of text and usually include characters with special meanings, they are very powerful and flexible for pattern matching. If you are familiar with UNIX or the text programming language AWK, you will probably have used regular expressions before, you will need experience of them to use them here.

XSL Stylesheet

When a record is being displayed in CalmView, customers can click on any of the links in the linked data panel. In order that data can then be shown in full, it needs to be converted into a suitable format using an XSLT stylesheet. From this drop-down box in the Configurator, choose the name of the XSLT stylesheet required to convert the data from this particular data source. All existing stylesheets stored in the Linked Data folder within the CalmView configuration, (for example C:\inetpub\wwwroot\CalmView\Configuration\LinkedData), will be displayed in this drop-down list and can be chosen from.

Groups

Various groups of linked data can be shown on a record page in CalmView. The groups settings in the Configurator enable you to give a heading to each group that is displayed on a record page (the heading is shown above links of that particular type).

When you choose the Groups option (underneath Linked Data) in the Configurator, a screen as shown in this example will appear:
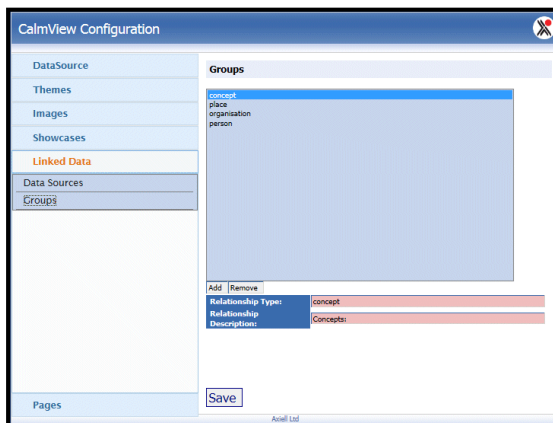
To set group parameters:

» Click the Linked Data option in the left hand menu of the Configurator.

» Click the Groups option, the group options are displayed in the right hand pane.

New groups can be added, existing groups can be edited or removed. By default, options may be set for 'concept', 'place', 'organisation' and 'person' groups.

Please note: that you must set the options individually for each of the groups. First select the type of group you wish to set parameters for, then set the parameters as follows:

The following paragraphs describe the fields shown here, with some guidance for input. Fields highlighted in red in the Configurator are mandatory.

Relationship Type

The name shown in the Configurator - in the top pane.

Relationship Description

Text you enter here will be displayed as a heading for a group of links, in the linked data panel on a record page.

Pages

CalmView is designed to enable you to customise your website to include your own style and functionality requirements. It is possible to customise elements common to every page, such as the font size switcher, or the search button. This is covered in the All Pages option, below. In addition, the following pages have unique elements that can be customised:

- » Advanced search: The form that asks users for the content they wish to search for in particular fields.
- » Collection browser: A tree display showing where related records appear in a hierarchy.
- » Home page: Your CalmView home page, which can include a What's new section
- » Image gallery: Displays particular records you have chosen in the Configurator for your image gallery
- » Overview: The search result display
- » Record: The full record display view
- » Showcase: Displays particular records you have chosen in the Configurator for your record showcase.
- » Sitemap: A list of pages (with links) on your website. The list is indented to show the structure.
- » Subject browser: Displays entries from the Calm subject thesaurus in their context, as an aid to completing the Advanced Search page.
- » Term browser: Displays entries from the Calm terms thesaurus in their context, as an aid to completing the Advanced Search page.

Unless the All Pages section is indicated above, use the options below this heading to customise these pages to suit your requirements.
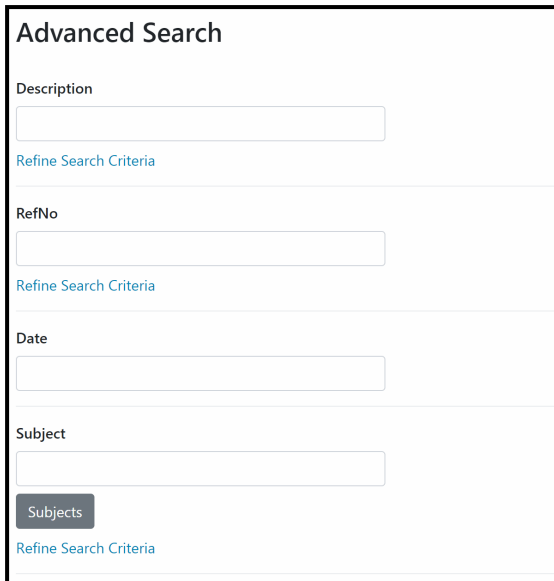
The following pages apply to document ordering, which is not available in CalmView 5 currently, although it remains in place in CalmView 4:

- » Change password: For a logged in user to choose a new password.
- » Choose order date form: For users to enter a booking date or choose from a calendar (see all pages section of the Configurator).
- » Confirm order form: Once an order has been placed, this page confirms whether items will be available on the chosen date or not (see all pages section of the Configurator).
- » Document ordering form: Page that appears when some/all of the order items are unavailable (see all pages section of the Configurator).
- » My items basket: A list of items the researcher is interested in, in 'shopping basket' format for document ordering.

» My items summary: This area contains links, it is shown at the top of every CalmView page, to the left of the quick search input box.

» Offline document order form: Requests the user's name, email and any special requests (see all pages section of the Configurator).

» Order item: The 'Create Order Wizard' which consists of the choose order date calendar, item available page and item unavailable page.

» Orders print preview: Print format list of orders for the user that is currently logged in.

» Register user: Requests a UserID and password for a new user as part of the registration process (for document ordering).

» User login page: Requests the user ID and password, accessed via a link at the top right of a page (see all pages section of the Configurator).

» User profile: The researcher's contact details, such as name and email address.

» User registration complete page: The final page that appears during user registration, it reminds the user of the ID they have chosen and asks them to record it (see all pages section of the Configurator).

» User registration terms and conditions: This page appears first during user registration if terms and conditions text has been specified (see all pages section of the Configurator).

» View my orders: Displays all past and pending (not yet produced) orders for the user that is currently logged in.

» Welcome page for logged in user: When a user logs in, welcome text appears with a continue button (see all pages section of the Configurator).

» Wizard pages for document ordering process: Various pages such as the order date form (see all pages section of the Configurator).

Advanced Search

The Advanced Search page contains; a name in the browser tab, an optional header and footer, a breadcrumb title, further search option descriptions and a search button, all of which can be customised. The Advanced Search page looks like:

Advanced Search

Description

Refine Search Criteria

RefNo

Refine Search Criteria

Date

Subject

Subjects

Refine Search Criteria

The following options are customised using the Advanced Search option in the Pages section of the Configurator. Fields highlighted in red in the Configurator are mandatory.

Page Name

The page name is shown in the browser's tab for the window in which CalmView is displayed, in the above example the page name is "CalmView: Advanced Search". To change this, enter your new text in the Page Name field and click the Save button.

Title

This feature is not used in the current version of CalmView.

Page Header

By default there is no header on the Advanced Search page. To add one, press the Edit key (in the Page Header field) to directly edit/enter text, click on the OK button, then the Save button. When running CalmView, the header will appear above the fields of the input form and just below the Breadcrumb Title.

Page Footer

By default there is no footer on the Advanced Search page. To add one, press the Edit key (in the Page Footer field) to directly edit/enter text, click on the OK button, then the Save button. When running CalmView, the footer will appear beneath the fields of the input form.

Breadcrumb Title

As in the example above, the Advanced Search page contains a breadcrumb style heading with the default text "Advanced Search". To change this, enter your new text in the Breadcrumb Title field and click the Save button.

The following settings relate to further search options available for fields with the 'Expandable' attribute set in the DataSource section of the Configurator. This attribute provides users with the additional options of searching 'With at least one of the words' or 'Without the words', as well as the default search 'With all the words'.

Open and Open ToolTip

On the Advanced Search page in CalmView, the text 'Refine Search Criteria' appears as a link next to fields with the Expandable attribute. Clicking on this link reveals entry boxes for the three different search options. To change the text on this link ('Refine Search Criteria' by default), enter your new text in the Open field and click the Save button.

To change the tooltip that appears when you hover over this text ('*Field name*: Refine Search Criteria' by default), enter your new text in the Open ToolTip field and click the Save button.

Close and Close ToolTip

On the Advanced Search page in CalmView, once a 'Refine Search Criteria' link has been clicked to reveal the additional search options, the text 'Standard Search Criteria' appears as a link underneath the fields. Clicking on this link hides the entry boxes for the bottom two search options, in other words, just the default of search with all the words is available. To change the text on this link ('Standard Search Criteria' by default), enter your new text in the Close field and click the Save button.

To change the tooltip that appears when you hover over this text ('*Field name*: Standard Search Criteria' by default), enter your new text in the Close ToolTip field and click the Save button.

And and And ToolTip

On the Advanced Search page in CalmView, once a 'Refine Search Criteria' link has been clicked, the additional search options are revealed. The text 'With all the words' appears next to the Boolean 'AND' search text entry box. To change this text, enter your new text in the And field and click the Save button.

To change the tooltip that appears when you hover over the 'AND' search text entry box ('*Field name*: Enter Search (all words)' by default), enter your new text in the And ToolTip field and click the Save button.

Not and Not ToolTip

On the Advanced Search page in CalmView, once a 'Refine Search Criteria' link has been clicked, the additional search options are revealed. The text 'Without the words' appears next to the Boolean 'NOT' search text entry box. To change this text, enter your new text in the Not field and click the ⌊Save⌋ button.

To change the tooltip that appears when you hover over the 'NOT' search text entry box ('*Field name*: Enter Search (exclude words)' by default), enter your new text in the Not ToolTip field and click the ⌊Save⌋ button.

Or and Or ToolTip

On the Advanced Search page in CalmView, once a 'Refine Search Criteria' link has been clicked, the additional search options are revealed. The text 'With at least one of the words' appears next to the Boolean 'OR' search text entry box. To change this text, enter your new text in the Or field and click the ⌊Save⌋ button.

To change the tooltip that appears when you hover over the 'OR' search text entry box ('*Field name*: Enter Search (any words)' by default), enter your new text in the Or ToolTip field and click the ⌊Save⌋ button.

Search Button

As in the example above, the Advanced Search page contains a Search button. When fields have been completed, this button is pressed to perform the search. The default text on this button is "Search". To change this, enter your new text in the Search Button field and click the ⌊Save⌋ button.

All Pages

Settings on this page are no longer in use in CalmView.

Collection Browser

The Collection Browser page in CalmView displays links to your Calm records and shows where they fit in the hierarchy of the collection they belong to. The Collection Browser page contains a name in the browser tab, an optional header and footer, and a breadcrumb title, all of which can be customised:
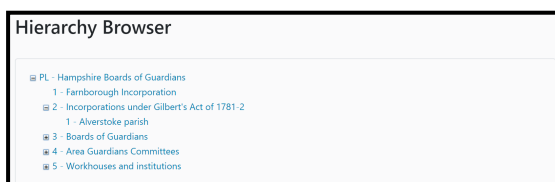
The following options are customised using the Collection browser option in the Pages section of the Configurator. Fields highlighted in red in the Configurator are mandatory.

Page Name

The page name is shown in the browser's tab for the window in which CalmView is displayed. To change this, enter your new text in the Page Name field and click the `Save` button.

BrowseTree BreadCrumb Title

As in the example above, the Collection Browser page contains a breadcrumb style heading with the default text "Hierarchy Browser". To change this, enter your new text in the BrowseTree_BreadcrumbTitle field and click the `Save` button.

Page Header

By default there is no header on the Collection Browser page. To add one, press the `Edit` key (in the Page Header field) to directly edit/enter text, click on the `OK` button, then the `Save` button. When running CalmView, the header will appear above the records in the hierarchy and just below the Breadcrumb Title.

Page Footer

By default there is no footer on the Collection Browser page. To add one, press the `Edit` key (in the Page Footer field) to directly edit/enter text, click on the `OK` button, then the `Save` button. When running CalmView, the footer will appear beneath the records in the hierarchy.

Homepage

The CalmView home page contains an image, headings and text, all of which can be customised, and looks like:
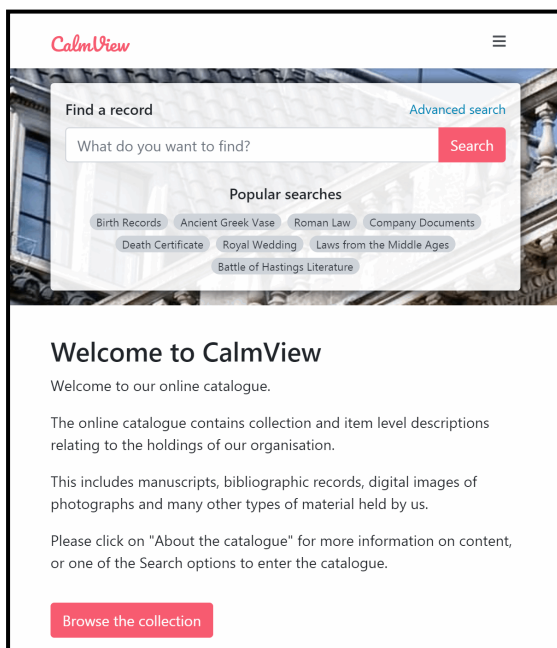
Much of the editing of the homepage (for example, adding images and changing which sections appear) is done in the CalmViewRefreshConfig.xml file. For more information about that, see Home Page.

The following five options are customised using the Homepage option in the Pages section of the Configurator.

Page Name

The page name is shown in the browser's tab for the window in which CalmView is displayed, in the above example the page name is "CalmView: Home Page". To change this, enter your new text in the Page Name field and click the Save button.

Welcome Title

As in the example above, the home page contains a heading with the default text "Welcome to CalmView". To change this, enter your new text in the Welcome Title field and click the Save button.

Welcome Text

As in the example above, the home page contains the default welcome text:
"Welcome to our online catalogue.
The online catalogue contains collection and item level descriptions relating to the holdings of our organisation.
This includes manuscripts, bibliographic records, digital images of photographs and many other types of material held by us.
Please click on "About the catalogue" for more information on content, or one of the Search options to enter the catalogue."

Press the Edit key (in the Welcome Text field) to directly edit this text, click on the OK button, then the Save button.

What's New
 If you have selected the Default theme, a What's New section is shown on the right hand side of your screen, displaying the new item records you have chosen to feature. The final two options apply to this What's New section.
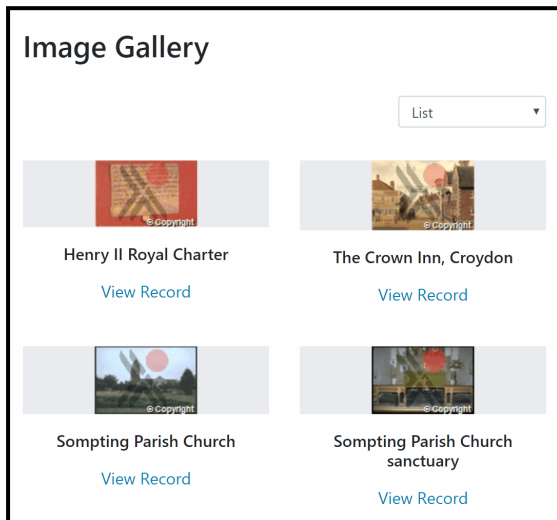
Title
As in the example above, the title given for these records by default is "What's New". To change this title, enter your new text in the What's New Title field and click the Save button.

View Record
As in the example above, the record link is labelled "View record" by default. To change this link, enter your new text in the (What's New) View Record field and click the Save button.

Image Gallery

The Image Gallery feature in CalmView showcases particular Calm records with images, selected by you. The Image Gallery page contains a name in the browser tab, a title, an optional header and footer, and a link to the full record view for each record, all of which can be customised:

Page Name

The page name is shown in the browser's tab for the window in which CalmView is displayed. To change this, enter your new text in the Page Name field and click the Save button.

Title

As in the example above, the Image Gallery page contains a heading with the default text "Image Gallery". To change this, enter your new text in the Title field and click the Save button.

Page Header

By default there is no header on the Image Gallery page. To add one, press the Edit key (in the Page Header field) to directly edit/enter text, click on the OK button, then the Save button. When running CalmView, the header will appear above the records being showcased and just below the Title.

Page Footer

By default there is no footer on the Image Gallery page. To add one, press the Edit key (in the Page Footer field) to directly edit/enter text, click on the OK button, then the Save button. When running CalmView, the footer will appear beneath the records being showcased.

View Label
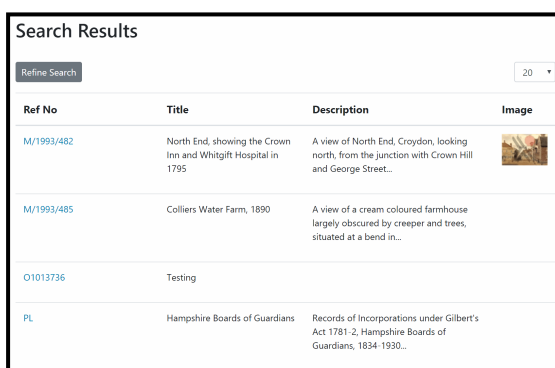
This option is no longer in use in CalmView.

Link Text

As in the example above, each record showcased on the Image Gallery page contains a link button. When the button is clicked the full record view is shown. The default text on this button is "View Record". To change this, enter your new text in the Link Text field and click the Save button.

Overview

The Overview page contains search results in a table form. The Calm records in the table have either been found by a CalmView simple search or a CalmView advanced search. The Overview page contains; navigation bars at the top and foot, a name in the browser tab, an optional header and footer, optional additional text in the event of an error message being shown, and a link for each record to add it to the basket for document ordering, all of which can be customised.

Here is an example Overview (or search results) page in CalmView:

The following options are customised using the Overview option in the Pages section of the Configurator. Fields highlighted in red in the Configurator are mandatory.

Top Pager

At the top of the Overview page in CalmView there is a drop-down box listing the number of records that can be seen in a list of search results. To turn this box off, untick Top Pager.

Bottom Pager

At the bottom of the Overview page in CalmView the number of records found is displayed and buttons to navigate between each page of search results are available. To turn these off, untick Bottom Pager.

Page Name

The page name is shown in the browser's tab for the window in which CalmView is displayed, in the above example the page name is "CalmView: Overview". To change this, enter your new text in the Page Name field and click the [Save] button.

Page Header

By default there is no header on the Overview page. To add one, press the [Edit] key (in the Page Header field) to directly edit/enter text, click on the [OK] button, then the [Save] button. When running CalmView, the header will appear above the top bar and the Overview table.

Page Footer

By default there is no footer on the Overview page. To add one, press the [Edit] key (in the Page Footer field) to directly edit/enter text, click on the [OK] button, then the [Save] button. When running CalmView, the footer will appear beneath the Overview table.

Error message pre: and Error message post:

Various error messages may be shown by the system when running CalmView, for example, if the service has been stopped. These two options enable you to insert additional text to be displayed alongside error messages.

By default there is no text shown either side of an error message on the Overview page. To add text in front of error messages, press the [Edit] key (in the Error message pre: field) to directly edit/enter text, click on the [OK] button, then the [Save] button.
To add text after error messages, press the [Edit] key (in the Error message post: field) to directly edit/enter text, click on the [OK] button, then the [Save] button.

Headings Alt Text

For sorting purposes, each overview column heading is clickable. The researcher can click a column heading to sort the overview display by this particular field. The tool tip, that pops up as you hover the mouse over the arrows, can be customised. By default the text is 'Click here to sort your results by *field name*'. To change this, press the [Edit] key (in the Headings Alt Text field) to directly edit/enter text, click on the [OK] button, then the [Save] button. If you wish to add the field name (for the relevant column) anywhere in your text (as the default does), use {0}. When your tool tip text is displayed whilst running CalmView, the field name for that column will be shown in the place of {0}.

Add to Basket Text

This option is not currently in use in CalmView.

Back to Search Text

This option is no longer in use in CalmView.

Record

The Record page in CalmView gives a full record view showing all fields that have content. The Record page contains a name in the browser tab, an optional header and footer, optional additional text in the event of an error message being shown, and a link to add the item to the basket for document ordering, all of which can be customised:

The following options are customised using the Record option in the Pages section of the Configurator. Fields highlighted in red in the Configurator are mandatory.

Page Name

The page name is shown in the browser's tab for the window in which CalmView is displayed, in the above example the page name is "CalmView: Record". To change this, enter your new text in the Page Name field and click the ⎡Save⎤ button.

Page Header

By default there is no header on the Record page. To add one, press the ⎡Edit⎤ key (in the Page Header field) to directly edit/enter text, click on the ⎡OK⎤ button, then the ⎡Save⎤ button. When running CalmView, the header will appear above the fields of the record and just below the breadcrumb title.

Page Footer

By default there is no footer on the Record page. To add one, press the ⎡Edit⎤ key (in the Page Footer field) to directly edit/enter text, click on the ⎡OK⎤ button, then the ⎡Save⎤ button. When running CalmView, the footer will appear underneath the fields of the record and any underviews.

Add to Basket Link Text

This option is not currently in use in CalmView.

Error message pre and Error message post

Various error messages may be shown by the system when running CalmView, for example, if the service has been stopped. These two options enable you to insert additional text to be displayed alongside error messages.

By default there is no text shown either side of an error message on the Record page.

To add text in front of error messages, press the Edit key (in the Error message pre: field) to directly edit/enter text, click on the OK button, then the Save button.

To add text after error messages, press the Edit key (in the Error message post: field) to directly edit/enter text, click on the OK button, then the Save button.

Showcase

The Showcase feature in CalmView highlights particular Calm records, selected by you. The Showcase page contains a name in the browser tab, a title, an optional header and footer, all of which can be customised:
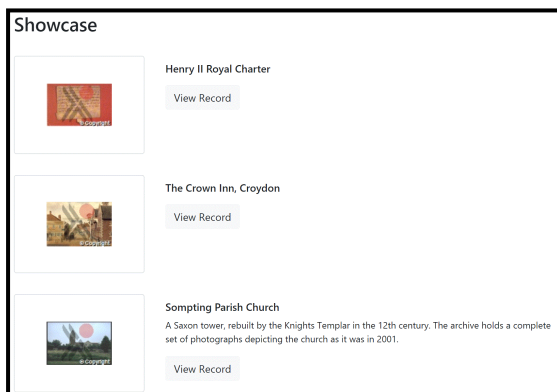
The following options are customised using the Showcase option in the Pages section of the Configurator. Fields highlighted in red in the Configurator are mandatory.

Page Name

The page name is shown in the browser's tab for the window in which CalmView is displayed. To change this, enter your new text in the Page Name field and click the Save button.

Title

As in the example above, the Showcase page contains a heading with the default text "Showcase". To change this, enter your new text in the Title field and click the Save button.

Page Header

By default there is no header on the Showcase page. To add one, press the `Edit` key (in the Page Header field) to directly edit/enter text, click on the `OK` button, then the `Save` button. When running CalmView, the header will appear above the records being showcased and just below the page title.

Page Footer

This option is no longer in use in CalmView.

Sitemap

The Sitemap page in CalmView is a list of pages (with links) on your website. The Sitemap page contains a name in the browser tab, a title, and an optional header and footer, all of which can be customised:
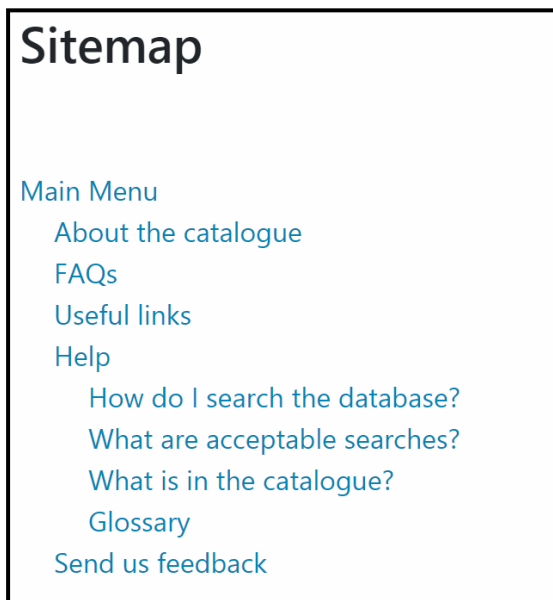
The following options are customised using the Sitemap option in the Pages section of the Configurator. Fields highlighted in red in the Configurator are mandatory.

Page Name

The page name is shown in the browser's tab for the window in which CalmView is displayed, in the above example the page name is "CalmView: Sitemap". To change this, enter your new text in the Page Name field and click the `Save` button.

Title

As in the example above, the Sitemap page contains a heading with the default text "Sitemap". To change this, enter your new text in the Title field and click the `Save` button.
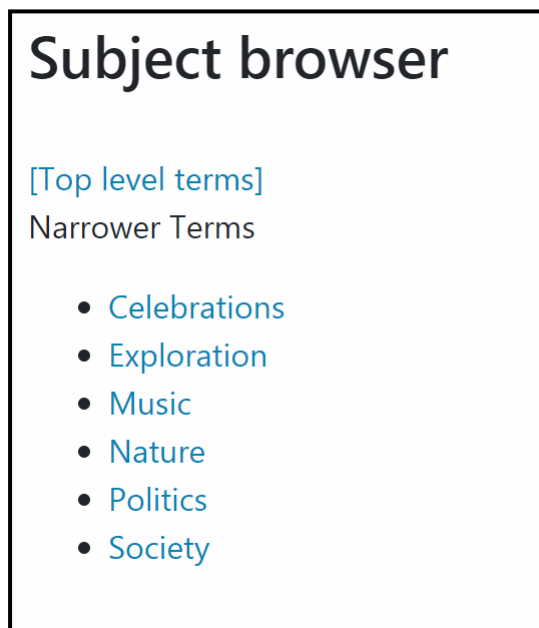
Page Header

By default there is no header on the Sitemap page. To add one, press the Edit key (in the Page Header field) to directly edit/enter text, click on the OK button, then the Save button. When running CalmView, the header will appear above the list of pages and just below the title.

Page Footer

By default there is no footer on the Sitemap page. To add one, press the Edit key (in the Page Footer field) to directly edit/enter text, click on the OK button, then the Save button. When running CalmView, the footer will appear underneath the list of pages.

Subject browser

The Subject browser in CalmView helps the user to complete the Subject field in the advanced search form. The browser shows terms from the Calm subject thesaurus, along with any related terms, narrower or broader terms. The Subject browser page contains a name in the internet browser tab, a title, and an optional header, all of which can be customised:

Subject browser

[Top level terms]
Narrower Terms

- Celebrations
- Exploration
- Music
- Nature
- Politics
- Society

The following options are customised using the Subject browser option in the Pages section of the Configurator. Fields highlighted in red in the Configurator are mandatory.

Page Name

The page name is shown in the browser's tab for the window in which CalmView is displayed. To change this, enter your new text in the Page Name field and click the Save button.

Title

As in the example above, the Subject browser page contains a heading with the default text "Subject Browser". To change this, enter your new text in the Title field and click the `Save` button.

Page Header

By default there is no header on the Subject browser page. To add one, press the `Edit` key (in the Page Header field) to directly edit/enter text, click on the `OK` button, then the `Save` button. When running CalmView, the header will appear above the terms and just below the page title.

Term browser

The Term browser page in CalmView helps the user to complete the Term field in the advanced search form. The browser shows terms from the Calm thesaurus, along with any related terms, narrower or broader terms. The Term browser page contains a name in the internet browser tab, a title, and an optional header, all of which can be customised:

Term browser

[Top level terms]

- ## Academic year

  Use For

  - Educational year

  Select

Related Terms

- Educational attendance

Narrower Terms

- Educational leave
- Educational timetables
- School holidays
- School time

The following options are customised using the Term browser option in the Pages section of the Configurator. Fields highlighted in red in the Configurator are mandatory.

Page Name

The page name is shown in the browser's tab for the window in which CalmView is displayed. To change this, enter your new text in the Page Name field and click the Save button.

Title

As in the example above, the Term browser page contains a heading with the default text "Term Browser". To change this, enter your new text in the Title field and click the Save button.

Page Header

By default there is no header on the Term browser page. To add one, press the Edit key (in the Page Header field) to directly edit/enter text, click on the OK button, then the Save button. When running CalmView, the header will appear above the terms and just below the page title.

Additional Editing

The following files can be edited outside of the Configurator, to customise various aspects of your CalmView website. Once you have installed CalmView, these files are found in the CalmView folder (usually in \inetpub\wwwroot\CalmView).

Please note: It is not recommended that you edit any part of any other files, unless specifically instructed to do so by Axiell or this guide. See the Disclaimer **page for more details.**

AdvancedSearch.sitemap
DefaultNavigation.sitemap
AddedLinks.sitemap
AboutCatalogue.aspx
AboutCatalogue.aspx.cs
CalmViewRefreshConfig.xml (for many display elements within CalmView, including the Menu Bar at the top of the screen, content on the home page, the Footer on each page, the sections (like 'Useful Links' or a social media feed) displayed in the Sidebar, and the data on the Contact Page)
custom.js (for customer-specific JavaScript, such as Google Analytics tracking code)
contact.xml (to edit the header text on the Contact page)
FAQs.aspx
FAQS.aspx.cs
feedback.aspx
feedback.aspx.cs
glossary.aspx
glossary.aspx.cs
help.aspx
help.aspx.cs
how.aspx
how.aspx.cs
links.aspx
links.aspx.cs
robots.txt (for telling search engines such as Google which pages on your CalmView site they can index)
searches.aspx
searches.aspx.cs
What.aspx
What.aspx.cs
Plus all files in the App_Themes\Customer folder and its subfolder(s).

It is possible to customise the left hand menu and the advanced search drop-down menu, please contact the Axiell service desk if you wish to do this.

Menu Bar

The Menu bar sits at the top of the screen for all pages in CalmView and allows the user to navigate to any important pages. It is configured in CalmViewRefreshConfig.xml, a file in the \CalmView\Configuration folder.
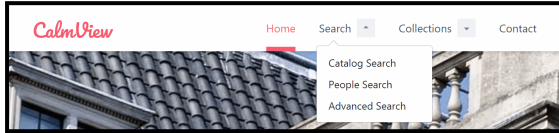
Logo

The code for the logo is in the ImagesCollection section. The menu bar shown above is configured as follows:

```
<ImagesCollection>

  <Images>

    <Image type="banner" source="bank-of-england.jpg"
    altText="The building of the Bank of England"/>

    <Image type="logo" source="brand-logo.svg"
    altText="CalmView"/>

  </Images>

</ImagesCollection>
```

To add a logo, the Image element must have the 'type' attribute 'logo'. 'source' points at the file and by default looks in the \CalmView\images folder. An svg file is used here to allow the image to scale while still looking clean, but other file formats such as jpg, png, or gif can be used, too. 'altText' is included for users accessing the site from a screen reader or other device and is usually used to explain the image.

Menu options

By default the main menu is set up with four options, Home (returning the user to the home page), Search (opening advanced search. A menu drops down to allow the user to choose the database in which to search), Collections (which gives access to the Showcase and Image Gallery), and Contact (which navigates to a contact page). These can be added to or removed. Any options can have a menu of sub-items show up below it, in the same way that Search allows the user to pick a database in which to search.

The code for the menu bar is in the MenuCollection section. The menu bar shown above is configured as follows:

```
<MenuCollection>

  <MenuItems>

    <MenuItem label="Home" link="default.aspx"/>
```

```
      <MenuItem label="Search"
      link="advanced.aspx?src=CalmView.Catalog">

        <MenuSubItems>

          <MenuSubItem label="Catalog Search"
          link="advanced.aspx?src=CalmView.Catalog"/>

          <MenuSubItem label="People Search"
          link="advanced.aspx?src=CalmView.Catalog"/>

          <MenuSubItem label="Advanced Search"
          link="advanced.aspx?src=CalmView.Catalog"/>

        </MenuSubItems>

      </MenuItem>

      <MenuItem label="Collections" link="showcase.aspx">

        <MenuSubItems>

          <MenuSubItem label="Showcase"
          link="showcase.aspx"/>

          <MenuSubItem label="Image Gallery"
          link="imagegallery.aspx"/>

        </MenuSubItems>

      </MenuItem>

      <MenuItem label="Contact" link="contact.aspx"/>

    </MenuItems>

  </MenuCollection>
```

Each entry on the Menu bar is set up as a MenuItem. The 'label' attribute determines the text that appears on the Menu bar. The 'link' attribute is the page that is linked to. By default, this is assumed to be in the \CalmView folder. To have a sub menu (as under 'Search'), add the MenuSubItems element below the entry it should be part of, and then add a MenuSubItem element for each desired option.

Home Page

The home page is usually the first page users will see upon arriving at your CalmView site. For that reason, it is designed to be very image-heavy. Behind the quick search that appears in the centre of the screen is a large banner image that can be customised. As part of the quick search box, a series of popular searches are listed, which can suggest possible searches to visitors. Just below that is a rotating 'carousel' of multiple images which can also be configured. Further down the page, a showcase of records you wish to highlight can appear and an embedded video, from a site like YouTube, can appear. These are all configured in CalmViewRefreshConfig.xml, a file in the \CalmView\Configuration folder.
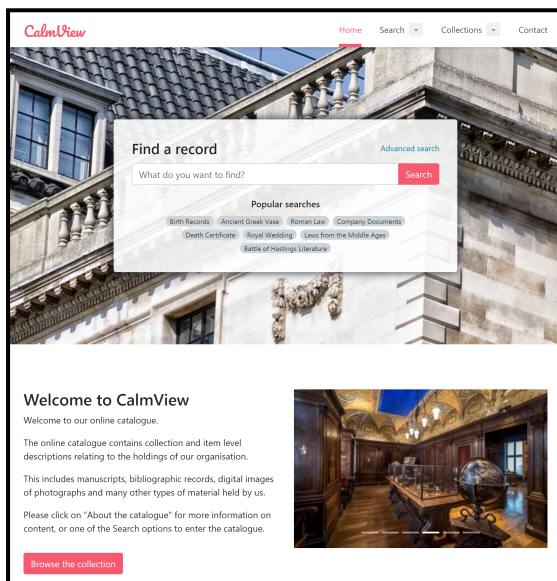
Banner image

The code for the banner is in the ImagesCollection section. The home page shown above is configured as follows:

```
<ImagesCollection>

  <Images>

    <Image type="banner" source="bank-of-england.jpg"
    altText="The building of the Bank of England"/>

    <Image type="logo" source="brand-logo.svg"
    altText="CalmView"/>

  </Images>

</ImagesCollection>
```

To add a banner, the Image element must have the 'type' attribute 'banner'. 'source' points at the file and by default looks in the \CalmView\images folder. Popular file

formats such as jpg, png, or gif are accepted. 'altText' is included for users accessing the site from a screen reader or other device and is usually used to explain the image.

Popular searches

The popular searches section is displayed just below the search bar and allows you to suggest searches to visitors. The code for it is in the SearchTermsCollection section. The home page shown above is configured as follows:

```
<SearchTermsCollection>

  <SearchTerms>

    <SearchTerm text="Birth Records"/>

    <SearchTerm text="Ancient Greek Vase"/>

    <SearchTerm text="Roman Law"/>

    <SearchTerm text="Company Documents"/>

    <SearchTerm text="Death Certificate"/>

    <SearchTerm text="Royal Wedding"/>

    <SearchTerm text="Laws from the Middle Ages"/>

    <SearchTerm text="Battle of Hastings Literature"/>

  </SearchTerms>

</SearchTermsCollection>
```

You can have as many popular searches as you would like listed on the home page, but be mindful of how much space they will take up. To add a new popular search, add a new SearchTerm element line to the list, and to remove a popular search, remove its SearchTerm element line from the list.

The content after 'text' is what is displayed on the home page for the user to click. It also is what the popular search searches for: when clicked, CalmView acts as if a user had typed this text into the quick search on the home page. Remember when editing searches that Calm search is case-insensitive, so the capitalisation you choose to use here will not affect the search results.

Carousel images

The code for carousel images is in the CarouselImagesCollection section. The home page shown above is configured as follows:

```
<CarouselImagesCollection>

  <CarouselImages>

    <CarouselImage source="63251sg4g.jpg" altText="The
    reading room of the archive"/>
```

```
    <CarouselImage source="55af3ac83.jpg" altText="An
    archival box being retrieved from a shelf"/>

    <CarouselImage source="35467ey65.jpg" altText="A
    request slip being filled out"/>

    <CarouselImage source="3twt52355.jpg" altText="The
    archive's original map room"/>

    <CarouselImage source="6y6566y45.jpg"
    altText="Archival boxes being transported by cart"/>

    <CarouselImage source="5567i5465.jpg" altText="The
    exterior of the archive building"/>

  </CarouselImages>

</CarouselImagesCollection>
```

For an image to appear in the carousel, there must be a CarouselImage element for it. It is possible to add any number of images, but Axiell recommends no more than 6-8. 'source' points at the file name and by default looks in the \CalmView\images folder. Popular file formats such as jpg, png, or gif are accepted. All the images will be scaled to a common width, which will vary depending on the size of the window or screen it is viewed on, but their aspect ratio will be preserved. This means if the images have different proportions, the carousel will vary in height for each image, which can look untidy. 'altText' is included for users accessing the site from a screen reader or other device and is usually used to explain the image.

The text beside the carousel images is configured in Homepage.

What's New showcase

The What's New showcase pulls through a random selection of records from the Record Showcase and displays them on the front page, as shown. It is configured in two places in CalmViewRefreshConfig.xml.
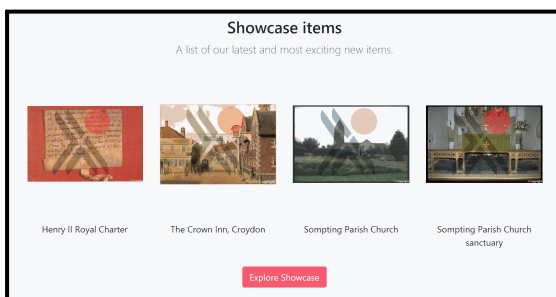
Activating the showcase

The code to activate/deactivate the What's New showcase is in the SectionsCollection section. The showcase shown above is configured as follows:

```
<SectionsCollection>
```

```
<Sections>

  <Section name="ShowcaseItem" enabled="true"/>

  <Section name="WhatsNew" enabled="true" maxItems="4"/>

  <Section name="UsefulLinks" enabled="true"/>

  <Section name="InstagramCard" enabled="true"/>

  <Section name="TwitterCard" enabled="true"/>

  <Section name="Youtube" enabled="true"/>

  <Section name="SocialContent" enabled="true"/>

</Sections>

</SectionsCollection>
```

The 'Section' element with name 'WhatsNew' controls the What's New showcase. To turn it on and off on the home page, change enabled to 'true' or 'false' (setting it to false does not hide the Showcase elsewhere on your CalmView site). To change the number of objects shown on the home page, change the maxItems number from 4 to your preferred number.

Showcase texts

It is possible to edit the text in the title and subtitle shown above the showcase, as well as the button that links the user to the full showcase. The code to edit these is in the StandardTextCollection section. The showcase shown above is configured as follows:

```
<StandardTextCollection>

  <StandardTexts>

    <StandardText text="Showcase items"
    id="whatsNewTitle"/>

    <StandardText text="A list of our latest and most
    exciting new items." id="whatNewSummaryText"/>

    <StandardText text="Explore Showcase"
    id="whatNewButton"/>

    <StandardText text="All content copyright of the
    archive" id="globalFooterText"/>

    <StandardText text="Digital Assets at the Archive"
    id="socialHeader"/>

    <StandardText text="What are we doing with our digital
    assets?" id="socialLeadText"/>

    <StandardText text="The archive holds many digital
    assets, including scans of photographs, digitised
    films, and born-digital content from contemporary
```

```
            creators. How are we managing this and what can you do
            with it? Find out here." id="socialText"/>

        </StandardTexts>

    </StandardTextCollection>
```

Three StandardText elements control the What's New showcase. To change the title, edit the text attribute in the line with id 'whatsNewTitle'. To change the subtitle, edit the text attribute in the line with id 'whatNewSummaryText'. To change the text on the button that links to the Showcase page, edit the text attribute in the line with id 'whatNewButton'.

Embedded video

The embedded video section allows you to display an embedded video (generally from YouTube, although it is possible to use other sites) and some explanatory text on the home page, as shown. It is configured in three places in CalmViewRefreshConfig.xml.

Activating embedded video

The code to activate/deactivate the embedded video section is in the SectionsCollection section. The section shown above is configured as follows:

```
    <SectionsCollection>

      <Sections>

        <Section name="ShowcaseItem" enabled="true"/>

        <Section name="WhatsNew" enabled="true" maxItems="4"/>

        <Section name="UsefulLinks" enabled="true"/>

        <Section name="InstagramCard" enabled="true"/>

        <Section name="TwitterCard" enabled="true"/>

        <Section name="Youtube" enabled="true"/>

        <Section name="SocialContent" enabled="true"/>

      </Sections>

    </SectionsCollection>
```
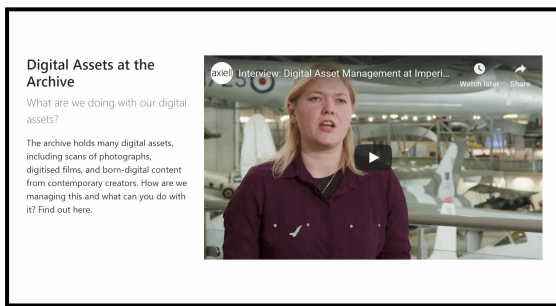
The 'Section' elements with name 'Youtube' and 'SocialContent' control embedded video. To turn the entire section on and off on the home page, change enabled to 'true' or 'false' beside 'SocialContent'. To turn just the video on or off (and leave the text visible), change enabled to 'true' or 'false' beside 'Youtube'.

Link to video

The code to link to the video you would like to embed is in the MediaSourceCollection section. The section shown above is configured as follows:

```
<MediaSourceCollection>

  <Mediasources>

    <MediaSource name="Youtube"
    source="https://www.youtube.com/embed/Bo_30a9_JLc"/>

    <MediaSource name="Twitter"
    source="https://twitter.com/axiellalm"/>

    <MediaSource name="Instagram"
    source="https://www.instagram.com/p/BxjTTlrC_Ra/"/>

    <MediaSource name="Facebook"
    source="https://www.facebook.com/axiellalm/"/>

  </Mediasources>

</MediaSourceCollection>
```

The 'MediaSource' element with the name 'Youtube' controls embedded video. To change the video you are linking to, find the embed URL of the video you wish to link to (on YouTube to find this you generally need to click 'Share' and 'Embed' below the video) and copy just the actual URL (that begins with http), ignoring the rest of the code that comes along with it. Paste that URL in the 'source' section.

Embedded video texts

It is possible to edit the text in the title, subtitle, and description of the embedded video, shown beside it. The code to edit these is in the StandardTextCollection section. The section shown above is configured as follows:

```
<StandardTextCollection>

  <StandardTexts>

    <StandardText text="Showcase items"
    id="whatsNewTitle"/>

    <StandardText text="A list of our latest and most
    exciting new items." id="whatNewSummaryText"/>

    <StandardText text="Explore Showcase"
    id="whatNewButton"/>
```

```
<StandardText text="All content copyright of the
archive" id="globalFooterText"/>

<StandardText text="Digital Assets at the Archive"
id="socialHeader"/>

<StandardText text="What are we doing with our digital
assets?" id="socialLeadText"/>

<StandardText text="The archive holds many digital
assets, including scans of photographs, digitised
films, and born-digital content from contemporary
creators. How are we managing this and what can you do
with it? Find out here." id="socialText"/>

    </StandardTexts>

  </StandardTextCollection>
```

Three StandardText elements control the embedded video section. To change the title, edit the text attribute in the line with id 'socialHeader'. To change the subtitle, edit the text attribute in the line with id 'socialLeadText'. To change the description, edit the text attribute in the line with id 'socialText'.

Sidebar

The sidebar shows up beside most pages in CalmView, including the list of search results, the advanced search screen, the record view, the hierarchy browser, and others. It allows you to provide more content to visitors, including a record chosen at random from the Record Showcase, a list of useful links, and social media content from sites like Twitter and Instagram. Any of the sidebar sections can be turned off if you prefer. These are all configured in CalmViewRefreshConfig.xml, a file in the \CalmView\Configuration folder.

Activating sections of the sidebar

The code to activate/deactivate the sections of the sidebar is in the SectionsCollection section. The sidebar shown above is configured as follows:

```
<SectionsCollection>

  <Sections>

    <Section name="ShowcaseItem" enabled="true"/>

    <Section name="WhatsNew" enabled="true" maxItems="4"/>

    <Section name="UsefulLinks" enabled="true"/>

    <Section name="InstagramCard" enabled="true"/>

    <Section name="TwitterCard" enabled="true"/>

    <Section name="Youtube" enabled="true"/>
```

```
        <Section name="SocialContent" enabled="true"/>

    </Sections>

</SectionsCollection>
```

The 'Section' element with name 'ShowcaseItem' controls the section that extracts a record at random from the Record Showcase. The sections with the names UsefulLinks, TwitterCard, and InstagramCard control the Useful Links, Twitter, and Instagram sidebar sections, respectively. To turn a sidebar section on and off, change enabled to 'true' or 'false'.

Useful Links content

The code to edit the Useful Links section of the sidebar is in the UsefulLinksCollection section. The sidebar shown above is configured as follows:

```
<UsefulLinksCollection>

    <UsefulLinks>

        <UsefulLink title="The National Archives"
        url="https://discovery.nationalarchives.gov.uk/"/>

        <UsefulLink title="ArchivesHub"
        url="https://archiveshub.jisc.ac.uk/"/>

        <UsefulLink title="AIM25 (London archives)"
        url="https://aim25.com/"/>

        <UsefulLink title="Europeana"
        url="https://www.europeana.eu/portal/en"/>

        <UsefulLink title="Internet Archives"
        url="https://archive.org/"/>

    </UsefulLinks>

</UsefulLinksCollection>
```

For a link to appear in the Useful Links section, there must be a UsefulLink element for it. It is possible to add any number of links, but be mindful of how much space they will take up. To add a new Useful Link, add a new UsefulLink element line to the list, and to remove a Useful Link, remove its UsefulLink element line from the list. Links will appear on screen in the order they are listed here.

The content after 'title' is what is displayed for the user to click. 'url' is the address of the website that the user will be taken to.

Twitter content

Entire feeds from Twitter (of all the tweets from a given user or a list of users) can be added to the sidebar. The code to link to the Twitter feed is in the MediaSourceCollection section. The section shown above is configured as follows:

```
<MediaSourceCollection>
```

```
<Mediasources>

  <MediaSource name="Youtube"
  source="https://www.youtube.com/embed/Bo_30a9_JLc"/>

  <MediaSource name="Twitter"
  source="https://twitter.com/axiellalm"/>

  <MediaSource name="Instagram"
  source="https://www.instagram.com/p/BxjTTlrC_Ra/"/>

  <MediaSource name="Facebook"
  source="https://www.facebook.com/axiellalm/"/>

</Mediasources>

</MediaSourceCollection>
```

The 'MediaSource' element with the name 'Twitter' controls the Twitter feed. To change the feed you are linking to, find the embed URL of either the Twitter profile (like the Axiell profile used above) or Twitter list you would like to link to. For a profile, the embed link should be the same as the link you would use to access the feed in our internet browser. Paste that URL in the 'source' section.

Instagram content

A specific post from Instagram can be added to the sidebar. The code to link to the image you would like to embed is in the MediaSourceCollection section. The section shown above is configured as follows:

```
<MediaSourceCollection>

  <Mediasources>

    <MediaSource name="Youtube"
    source="https://www.youtube.com/embed/Bo_30a9_JLc"/>

    <MediaSource name="Twitter"
    source="https://twitter.com/axiellalm"/>

    <MediaSource name="Instagram"
    source="https://www.instagram.com/p/BxjTTlrC_Ra/"/>

    <MediaSource name="Facebook"
    source="https://www.facebook.com/axiellalm/"/>

  </Mediasources>

</MediaSourceCollection>
```

The 'MediaSource' element with the name 'Instagram' controls the Instragram post. To change the post you are linking to, find the embed URL of the post you wish to link to (on Instagram to find this you generally need to open the post, click the three-dots button, and click 'Embed') and copy just the actual URL (that begins with http), ignoring the rest of the code that comes along with it. Paste that URL in the 'source' section.

Contact Page

The contact page is accessible from the main menu bar at the top of the screen and is designed to allow you to give visitors information about how to reach your organisation. It can contain a map of your organisation's location (taken from Google Maps) as well as contact information below that. These are configured in CalmViewRefreshConfig.xml, a file in the \CalmView\Configuration folder. At the top there is a title and paragraph of information (which can be edited in the contact.xml file, in the same Configuration folder).
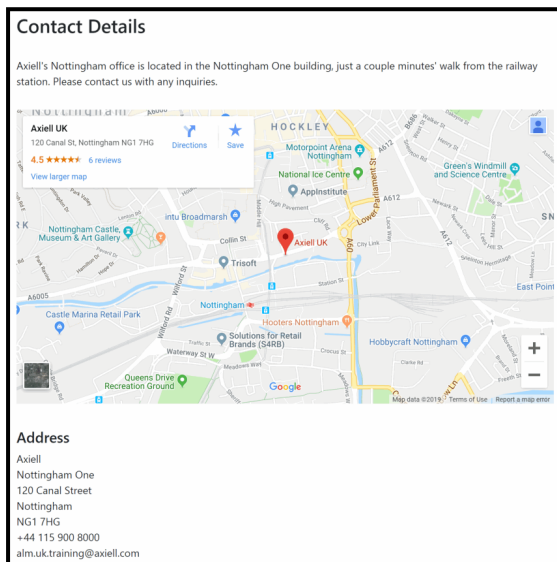
The code for the contact page is in the ContactInfoCollection section. The menu bar shown above is configured as follows:

```
<ContactInfoCollection>

  <ContactInfos>

    <ContactInfo type="map" text=""
    src="https://www.google.com/maps/embed?pb=!1m18!1m12!1
    m3!1d4408.938613440537!2d-
    1.146073494992377!3d52.94858721902724!2m3!1f0!2f0!3f0!
    3m2!1i1024!2i768!4f13.1!3m3!1m2!1s0x4879c3d400940e23%3
    A0x153680b0ba178836!2sAxiell+UK!5e0!3m2!1sen!2suk!4v15
    59223942753!5m2!1sen!2suk"></ContactInfo>

    <ContactInfo type="address1" text="Axiell"
    src=""></ContactInfo>

    <ContactInfo type="address2" text="Nottingham One"
    src=""></ContactInfo>

    <ContactInfo type="address3" text="120 Canal Street"
    src=""></ContactInfo>

    <ContactInfo type="address4" text="Nottingham"
    src=""></ContactInfo>
```

```
        <ContactInfo type="address5" text="NG1 7HG"
        src=""></ContactInfo>

        <ContactInfo type="address6" text="+44 115 900 8000"
        src=""></ContactInfo>

        <ContactInfo type="address7"
        text="alm.uk.training@axiell.com"
        src=""></ContactInfo>

    </ContactInfos>

  </ContactInfoCollection>
```

For a map, there must be a ContactInfo element with a 'type' of 'map'. 'text' can be left empty. 'src' must contain a link to the map in an embeddable form. To find this in Google Maps, you will need to find a specific location (like a building or a business) and click 'Share'. From there, you will need to choose the Embed option and copy just the actual URL (that begins with http), ignoring the rest of the code that comes along with it. Paste that URL in the 'src' section.

And address can be as many lines as you need. Each line must have its own ContactInfo element with a 'type' of 'address1', 'address2', 'address3', etc., depending on which line it is. 'text' will be the text that is part of that line, for example a street address or postcode. 'src' can be left empty.

Footer

At the bottom of each page in CalmView is a footer which contains, among other things, links to various pages within CalmView, icons that link to social media, as well as a copyright notice at the bottom left. These are each configured in CalmViewRefreshConfig.xml, a file in the \CalmView\Configuration folder.

Sitemap Privacy Terms

All content copyright of the archive   © CalmView
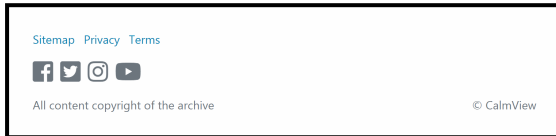
Page links

The code to edit or remove the links is in the StandardTextCollection section. The links shown above are configured as follows:

```
<StandardTextCollection>

  <StandardTexts>

    <StandardText text="Showcase items"
    id="whatsNewTitle"/>

    <StandardText text="Sitemap" href="sitemap.aspx"
    id="siteMap"/>

    <StandardText text="Privacy" href="privacy.aspx"
    id="privacy"/>

    <StandardText text="Terms"
    href="termsandconditions.aspx" id="terms"/>

    <StandardText text="A list of our latest and most
    exciting new items." id="whatNewSummaryText"/>

    <StandardText text="Explore Showcase"
    id="whatNewButton"/>

    <StandardText text="All content copyright of the
    archive" id="globalFooterText"/>

    <StandardText text="Digital Assets at the Archive"
    id="socialHeader"/>

    <StandardText text="What are we doing with our digital
    assets?" id="socialLeadText"/>

    <StandardText text="The archive holds many digital
    assets, including scans of photographs, digitised
    films, and born-digital content from contemporary
    creators. How are we managing this and what can you do
    with it? Find out here." id="socialText"/>
```

```
    </StandardTexts>

  </StandardTextCollection>
```

For each CalmView page you wish to link to, there must be a StandardText element with the id 'siteMap', 'privacy', or 'terms'. For this reason, there are a maximum of 3 links you can display here, although they do not have to be to a sitemap, privacy policy, or terms and conditions page. 'text' is the text that will be displayed in the footer. 'href' is the filename of the page within the \CalmView folder.

If you don't wish to use all of these, it is possible to delete any line to get rid of that link.

Social media links

The code to add, edit, or remove the social media icon links is in the SocialIconsCollection section. The icons shown above are configured as follows:

```
  <SocialIconsCollection>

    <SocialIcons>

      <SocialIcon text="facebook"
      url="https://www.facebook.com/axiellalm/"
      iconClass="fab fa-facebook-square fa-2x"/>

      <SocialIcon text="twitter"
      url="https://twitter.com/axiellalm" iconClass="fab fa-
      twitter-square fa-2x"/>

      <SocialIcon text="instagram"
      url="https://www.instagram.com/axiellmedia/"
      iconClass="fab fa-instagram fa-2x"/>

      <SocialIcon text="youtube"
      url="https://www.youtube.com/channel/UCccv4HkZ5QWsFYsY
      lpv49pg" iconClass="fab fa-youtube fa-2x"/>

    </SocialIcons>

  </SocialIconsCollection>
```

For each social media site you wish to link to, there must be a SocialIcon element. 'url' holds the URL of the page you would like users clicking the icon to be redirected to (most likely, your organisation's page on the social media site). 'iconClass' is the FontAwesome identifier of the icon for the social media site (for example, 'fa-instagram' is the name of the FontAwesome icon for Instagram). 'text' is included as alternative text for users accessing the site from a screen reader or other device and is used here to explain what the icon is.

If you don't wish to use all of these, it is possible to delete any line to get rid of that icon. It is also possible to add additional lines if you wish to link to additional social media sites (Pinterest, for example), provided they have a FontAwesome icon (which you can look up on FontAwesome's website).

Copyright notice

It is possible to edit the text in the copyright notice at the bottom left of the footer. The code to edit this is in the StandardTextCollection section. The footer shown above is configured as follows:

```
<StandardTextCollection>

  <StandardTexts>

    <StandardText text="Showcase items"
    id="whatsNewTitle"/>

    <StandardText text="Sitemap" href="sitemap.aspx"
    id="siteMap"/>

    <StandardText text="Privacy" href="privacy.aspx"
    id="privacy"/>

    <StandardText text="Terms"
    href="termsandconditions.aspx" id="terms"/>

    <StandardText text="A list of our latest and most
    exciting new items." id="whatNewSummaryText"/>

    <StandardText text="Explore Showcase"
    id="whatNewButton"/>

    <StandardText text="All content copyright of the
    archive" id="globalFooterText"/>

    <StandardText text="Digital Assets at the Archive"
    id="socialHeader"/>

    <StandardText text="What are we doing with our digital
    assets?" id="socialLeadText"/>

    <StandardText text="The archive holds many digital
    assets, including scans of photographs, digitised
    films, and born-digital content from contemporary
    creators. How are we managing this and what can you do
    with it? Find out here." id="socialText"/>

  </StandardTexts>

</StandardTextCollection>
```

To change the footer, edit the text attribute in the line with id 'globalFooterText'. Although it is a copyright notice here, it could hold any text you would like to appear at the bottom of each page.

Search Engine Indexing

In a default CalmView setup, search engines link to your copy of CalmView as a whole, but not individual pages (for individual records) within that page. If you want Google or other search engines to be able to find individual items, you will need to edit the robots.txt file. The robots.txt file tells search engines like Google how to read your CalmView site. You will need to edit it so that it points at your CalmView site's sitemap, then save the file in the proper location. A sitemap is basically an index of the pages on a website in a form easily understood by search engines, helping them to find pages on the site.

To update the robots.txt File

Start on the web server that holds your CalmView files:

» Navigate to the folder */inetpub/wwwroot/CalmView*

» Open the file *txt* in Notepad (or another plain text editor)
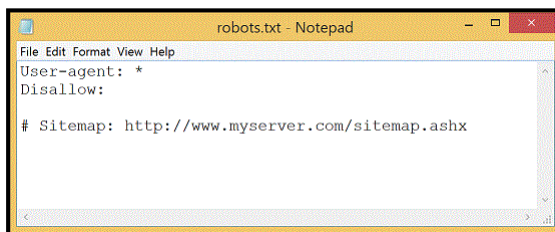
» Delete the '#' and the space (' ') before 'Sitemap'

» Replace 'www.myserver.com' with the domain name of your CalmView site's address (the part after 'http://' and before '/sitemap.ashx' which ends with a top-level domain like '.ac.uk' or '.com'), for example 'archives.hemdon.gov.uk' or 'calmview.hemdon.ac.uk'
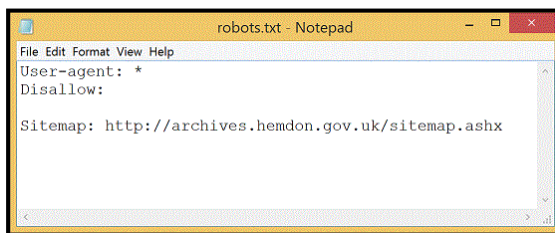

» Click **File** on the menu bar

» Click **Save As...**

» Navigate to the highest-level folder of your CalmView site (this is most likely *inetpub/wwwroot*)

» Click the drop-down box next to 'Encoding'
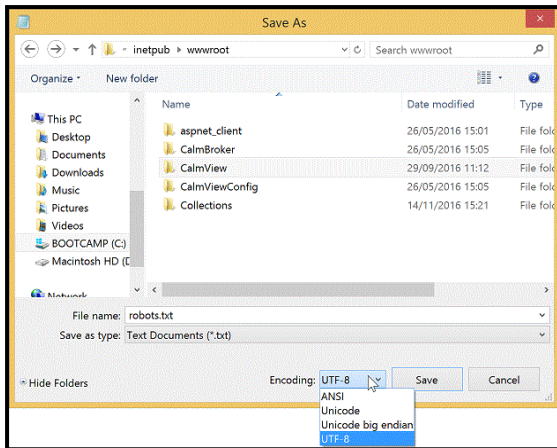
» Click 'ANSI'

» Click **OK**

Note: It is okay to overwrite a previous robots.txt file this way, but you may want to make a backup of that file before doing so.

If your organisation has multiple CalmView sites, you can link to the sitemaps of each of them in a single robots.txt file, as below:
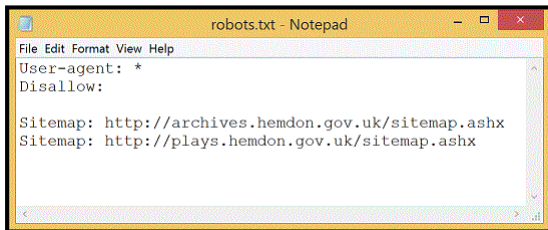
Note: Indexing is not an instant process; it may take some time for your CalmView site to be fully indexed by search engines.

Web Statistics

CalmView records information, and also allows the use of third-party statistical trackers, to help you analyse use of your website.

Transactions are recorded in a log file, found in the \CalmView\App_Data\logs folder. The CRecords folder logs which records are accessed, the Error folder logs any errors that occurred, and the General folder logs any searches made on CalmView. A new log file is created each month. We recommend using your own data analysis tools to compile any statistics that you require.

If you wish to use third-party analytical tools such as Google Analytics, a JavaScript file called custom.js has been included in the \CalmView folder. To use custom.js, simply open it in a text editor (such as Notepad) and paste the tracking code that your analytical service has provided. If there are any <script> tags at the top and bottom of the pasted code, such as <script type="text/javascript"> or </script>, you will need to delete these tags. Finally, save and close custom.js.

Reference

This section of the guide contains pages to help support you in your use of both CalmView and this online CalmView manual.

We have created a Glossary in which you can look up terms and phrases that may be unfamiliar. The list of Frequently Asked Questions is based on feedback from the Calm helpdesk, and the contact details for the helpdesk are included for those times when you need further assistance.

Minimum Requirements

These are the minimum requirements for each of the three machines/environments involved in installing CalmView and building your CalmView website.

Please note: These setups are needed regardless of whether you are installing CalmView yourselves or you are preparing for Axiell to install for you.

For further explanation of the three machines described below, please see the 'Introduction to Installation' page.

Live Calm Server

» The live server must be running version 11.0 or above of Calm.

Development Environment

» The development environment needs to have as an operating system Windows 7 Pro or above.

» Microsoft Internet Information Services manager (IIS) 6 or above with the URL Rewrite module.

» .net 4.0 framework.

» A modern internet browser updated to its latest version.

» You will need full administrator rights to this machine, so you can edit the contents of the Calm and CalmView files that will be stored here.

Public-facing Server

» The public-facing server needs to have Windows 2008 Server or above.

» Microsoft Internet Information Services manager (IIS) 6 or above with the URL Rewrite module. (When using IIS7 or above it is essential to load the IIS6 compatible infrastructure.)

» .net 4.0 framework.

Connections

» TCP ports 2143, 2144, and 2145 must be open between the Calm server and the server(s) running CalmView to allow them to communicate (outbound on the CalmView server and inbound on the Calm server).

Service Desk Contact Details

Axiell Service Desk
Nottingham One
120 Canal Street
Nottingham
NG1 7HG

Telephone 0345 222 1511

Email servicedesk@axiell.co.uk

Hornbill Online Support Portal

Editing Quick Reference

Because every organisation using it is different, CalmView is very configurable. However, it can be hard to know where to go to make a particular change. This page is intended to serve as a quick reference with information about where to go to edit a particular part of a CalmView page.

HOME PAGE

The Home Page appears when a visitor first navigates to your CalmView site. It features a big quick search to get users easily into your catalogue, but also many elements to interest visitors and serve extra content to them.
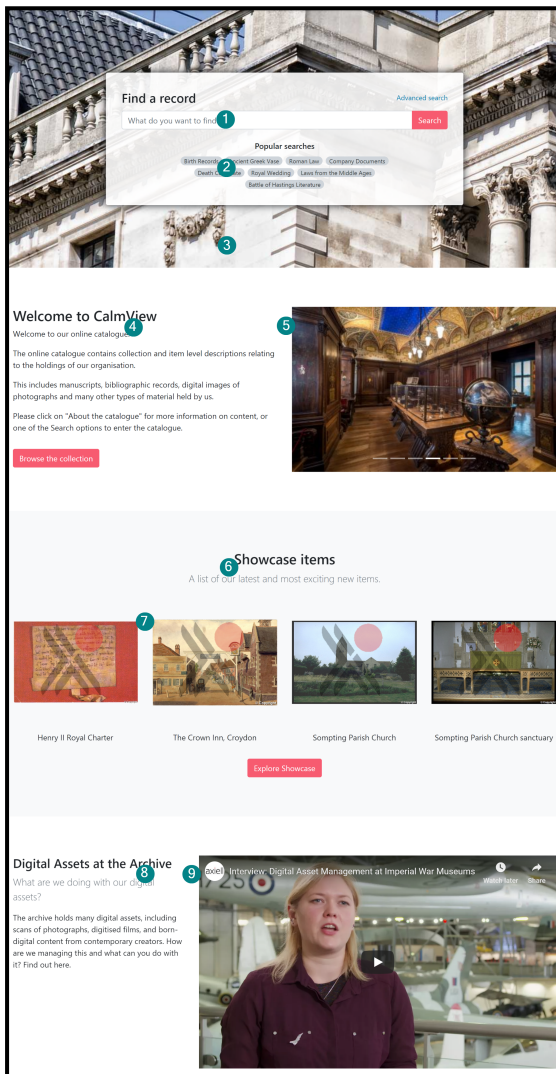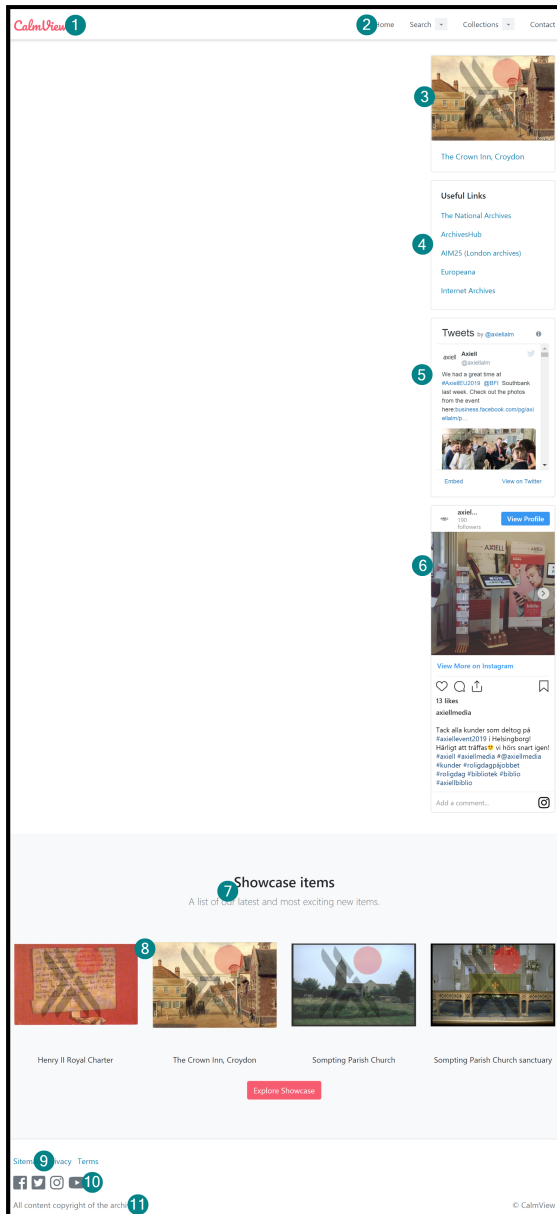

Num.	Property	Edited
1	Search fields	Configurator \ DataSource \ CalmView \ DATABASENAME \ Quick Search > Destination
1	Text	Configurator \ DataSource \

Num.	Property	Edited
		CalmView \ DATABASENAME > Quicksearch placeholder text
2	Searches	\CalmView\Configuration\ CalmViewRefreshConfig.xml > SearchTermsCollection
3	Image	\CalmView\Configuration\ CalmViewRefreshConfig.xml > ImagesCollection
4	Title text	Configurator \ Pages \ Homepage > Welcome title
4	Body text	Configurator \ Pages \ Homepage > Welcome text
5	Images	\CalmView\Configuration\ CalmViewRefreshConfig.xml > CarouselImagesCollection
6	Enable / disable section	\CalmView\Configuration\ CalmViewRefreshConfig.xml > SectionsCollection
6	Text	\CalmView\Configuration\ CalmViewRefreshConfig.xml > StandardTextCollection
7	Record choice	Configurator \ Showcases \ Record Showcase > Add
8	Text	\CalmView\Configuration\ CalmViewRefreshConfig.xml > StandardTextCollection
9	Video	\CalmView\Configuration\ CalmViewRefreshConfig.xml > MediaSourceCollection
9	Enable / disable section	\CalmView\Configuration\ CalmViewRefreshConfig.xml > SectionsCollection

ALL PAGES

Several elements appear on all (or most) pages in CalmView. The header appears at the top of all pages, displaying a logo and allowing navigation around the site, and the footer appears at the bottom of all pages, displaying showcase items, links to social media, and a copyright notice or other message. Along the right hand side of all pages apart from the home page is a sidebar which can display records from the showcase, useful links, a Twitter feed, and an Instagram image.

Num.	Property	Edited
1	Image	\CalmView\Configuration\CalmViewRefreshConfig.xml > ImagesCollection
2	Menu options	\CalmView\Configuration\CalmViewRefreshConfig.xml > MenuCollection
3	Enable / disable section	\CalmView\Configuration\CalmViewRefreshConfig.xml > SectionsCollection
3	Record choice	Configurator \ Showcases \ Record Showcase > Add
4	Enable / disable section	\CalmView\Configuration\CalmViewRefreshConfig.xml > Sec-

Num.	Property	Edited
		tionsCollection
4	Links	\CalmView\Configuration\CalmViewRefreshConfig.xml > UsefulLinksCollection
5	Enable / disable section	\CalmView\Configuration\CalmViewRefreshConfig.xml > SectionsCollection
5	Select feed	\CalmView\Configuration\CalmViewRefreshConfig.xml > MediaSourceCollection
6	Enable / disable section	\CalmView\Configuration\CalmViewRefreshConfig.xml > SectionsCollection
6	Select image	\CalmView\Configuration\CalmViewRefreshConfig.xml > MediaSourceCollection
7	Enable / disable section	\CalmView\Configuration\CalmViewRefreshConfig.xml > SectionsCollection
7	Text	\CalmView\Configuration\CalmViewRefreshConfig.xml > StandardTextCollection
8	Record choice	Configurator \ Showcases \ Record Showcase > Add
9	Links	\CalmView\Configuration\CalmViewRefreshConfig.xml > StandardTextCollection
10	Links	\CalmView\Configuration\CalmViewRefreshConfig.xml > SocialIconsCollection
11	Text	\CalmView\Configuration\CalmViewRefreshConfig.xml > StandardTextCollection

ADVANCED SEARCH

The Advanced Search allows users to search in a more sophisticated way. It can be accessed by clicking 'Advanced Search' or 'Refine Search' buttons in CalmView, found above the quick search, above search results, and on the menu bar at the top of the screen.

Num.	Property	Edited
1	Text	Configurator \ Pages \ Advanced Search > Breadcrumb Title
2	Text	Configurator \ Pages \ Advanced Search > Page Header
3	Fields	Configurator \ DataSource \ CalmView \ DATABASENAME \ Advanced Search > Destination
3	Field labels	Configurator \ DataSource \ CalmView \ DATABASENAME \ Advanced Search > Field Label
4	Any Text fields	Calm Admin Program > Field > Hide/Show in OPAC...
5	Text	Configurator \ Pages \ Advanced Search > And
6	Text	Configurator \ Pages \ Advanced Search > Or
7	Text	Configurator \ Pages \ Advanced Search > Not
8	Text	Configurator \ Pages \ Advanced Search > Close
8	Enable / disable	Configurator \ DataSource \ CalmView \ DATABASENAME \ Advanced Search > Expandable
9	Text	Configurator \ Pages \ Advanced Search > Search Button
10	Text	Configurator \ Pages \ Advanced Search > Page Footer

OVERVIEW (SEARCH RESULTS)

The Search Results page, also known as the Overview, shows up for users following a search and allows the users to navigate through all records found.
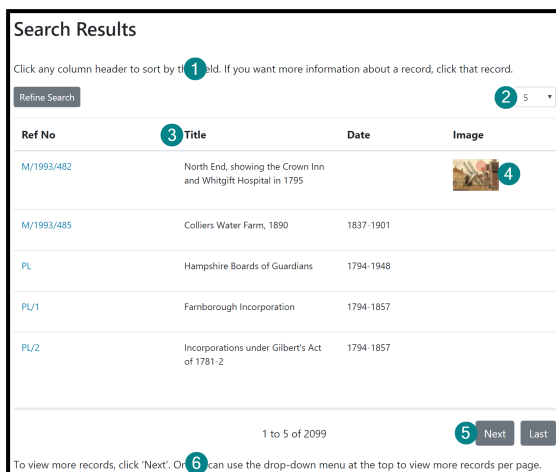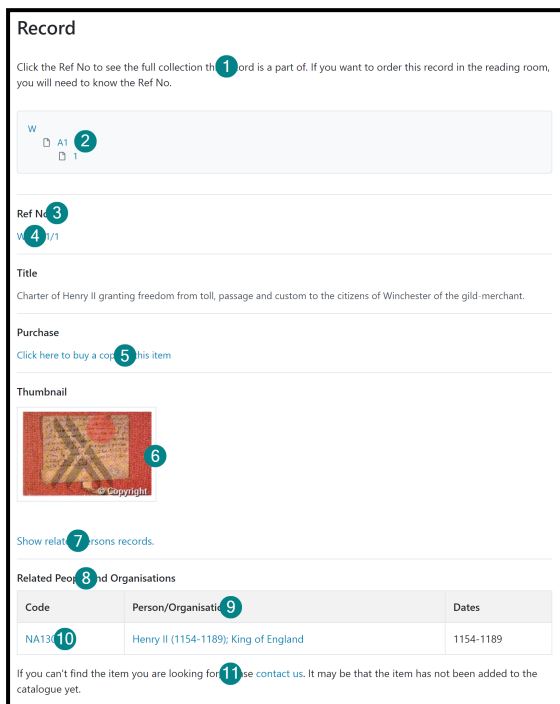

Num.	Property	Edited
1	Text	Configurator \ Pages \ Overview > Page Header
2	Enable / disable	Configurator \ Pages \ Overview > Top Pager
2	Default number	Configurator \ DataSource \ CalmView \ DATABASENAME > Overview Page Length
2	Max number	Configurator \ DataSource \ CalmView \ DATABASENAME > Maximum Overview Size
3	Fields	Configurator \ DataSource \ CalmView \ DATABASENAME \ Overview Fields > Destination
3	Field labels	Configurator \ DataSource \ CalmView \ DATABASENAME \ Overview Fields > Overview heading
4	Display images	Configurator \ DataSource \ CalmView \ DATABASENAME > Images/Media in Overviews
4	Thumbnail size & watermark	Configurator \ Images \ CalmView Images > OverviewThumbnail
5	Enable / disable	Configurator \ Pages \ Overview > Bottom Pager
6	Text	Configurator \ Pages \ Overview > Page Footer

Note: The Overview is not sortable if there are too many search results (this is the case in the image above). The number of results CalmView considers 'too many' can be adjusted in Configurator \ DataSource \ CalmView \ DATABASENAME > Overview sort limit.

RECORD VIEW

The Record View screen appears when a user selects a single record (usually from the Search Results screen) to view more information about it. It can display as many or as few fields from a record as you would like.
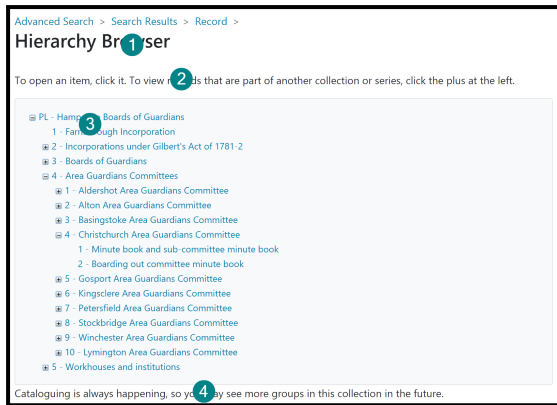

Num.	Property	Edited
1	Text	Configurator \ Pages \ Record > Page Header
2	Tree fields	Configurator \ DataSource \ CalmView \ DATABASENAME \ Treeview Fields > Destination
3	Fields	Configurator \ DataSource \ CalmView \ DATABASENAME \ Record View \ Record Fields > Destination
3	Field labels	Configurator \ DataSource \ CalmView \ DATABASENAME \ Record View \ Record Fields > Field Label
4	Link to tree	Configurator \ DataSource \ CalmView \ DATABASENAME \ Record View \ Record Fields > Tree field
5	Enable link	Configurator \ DataSource \ CalmView \ DATABASENAME \ Record View \ Record Fields > Url
5	Link text	Configurator \ DataSource \ CalmView \ DATABASENAME \

Num.	Property	Edited
		Record View \ Record Fields > URL Display Text
6	Thumbnail size & watermark	Configurator \ Images \ CalmView Images > RecordThumbnail
7	Enable / disable	Configurator \ DataSource \ CalmView \ DATABASENAME \ Record View \ Link Fields > Child data source **and** Foreign key
7	Text	Configurator \ DataSource \ CalmView \ DATABASENAME \ Record View \ Link Fields > Description
8	Text	Configurator \ DataSource \ CalmView \ DATABASENAME \ Record View \ Underview Fields \ DATABASENAME > Description
9	Fields	Configurator \ DataSource \ CalmView \ DATABASENAME \ Record View \ Underview Fields \ DATABASENAME > Destination
9	Field labels	Configurator \ DataSource \ CalmView \ DATABASENAME \ Record View \ Underview Fields \ DATABASENAME > Heading
10	Link to record	Configurator \ DataSource \ CalmView \ DATABASENAME \ Record View \ Underview Fields \ DATABASENAME > Key field
11	Text	Configurator \ Pages \ Record > Page Footer

Note: If a field contains no data, it will not be displayed on the record.

HIERARCHY BROWSER (COLLECTION BROWSER)

The Hierarchy Browser (also known as the Collection Browser) appears if the user clicks on a tree field on a record, allowing navigation of the entire collection the record is a part of.

Num.	Property	Edited
1	Text	Configurator \ Pages \ Collection Browser > BrowseTree_ BreadCrumb
2	Text	Configurator \ Pages \ Collection Browser > Page Header
3	Tree fields	Configurator \ DataSource \ CalmView \ DATABASENAME \ Treeview Fields > Destination
4	Text	Configurator \ Pages \ Collection Browser > Page Footer

Glossary

Boolean - A logical data type, named after the English mathematician and philosopher George Boole. Examples of boolean operators are AND, NOT, OR.

Multimedia/Graphics Fields - Multimedia and graphics fields enable you to link diverse types of media, such as images, sound files, PDF documents and video files to your Calm records. Supported media types in Calm include:
Image Formats: TIFF, JPEG, BMP, PNG, GIF, Photoshop PSD
Audio formats: MP3, OGG Vorbis, Windows Media Audio (WMA), MIDI, WAV, Real Audio, Flac Lossless, Monkey's Audio Lossless (APE).
Video formats: Real Media, Windows Media Video (WMV), AVI, Flash Video (FLV)
Application formats: PDF, ZIP, RAR, Microsoft Excel, Microsoft Word

Hexadecimal RGB value - Every colour displayed by computers, such as those on your CalmView pages, is made up of a combination of red, green and blue in various proportions. The unique RGB combination for a particular colour is expressed as a six-digit alphanumeric value in hexadecimal.

Tooltip - When a user hovers the cursor/mouse pointer over an item, without clicking it, a small box of text called a tooltip appears with supplementary information regarding the item.

Frequently Asked Questions

Why have I lost changes made in the Configurator?

Whilst you are running the CalmView Configurator a Microsoft Internet Information Services (IIS) session is running. It is advisable to save changes on each page of the Configurator as you make them, as IIS will automatically time out a session if there is no activity and this could lead to you losing unsaved changes.

Why don't my images display in CalmView?

Images to be displayed on the record view need to be stored in the Calm images folder (usually C:/DScribe/Images) on the copy of Calm used by your CalmView website.

CalmView will typically work with a copy of your Calm system on the web server i.e. not the copy you are adding records to. It is important to ensure that this web server copy of Calm includes the default Images folder so that multimedia files and images are correctly displayed in CalmView.

Some users of my website find that the text at the bottom of the CalmView pages is 'wrapping' and not displaying correctly. Why is this?

Unwanted text 'wrapping' is likely to be caused by viewing your CalmView site in the web browser Internet Explorer 6, this version of IE dates back to 2001 (this browser has been discontinued and replaced with Microsoft Edge). CalmView websites will work in IE 6 but, as with many other current websites, some of the design elements will not look their best. The latest version of IE is free to download.

How do I change the logo at the very top of each CalmView page?
See Menu Bar for details.

Can I expand the Simple Search to include all fields?

The fields searched by default are Title and Description. Using the Configurator it IS possible to search different fields in the Catalog database, however it is recommended that only 2 or 3 fields are used for simple searches; adding more fields may affect the speed of search performance.

You should not add any date fields to this search, it is intended as a simple text search only. Adding a date field here would give unpredictable search results. If you need to search on a date field, the Advanced Search is the correct place to add this.

Also, you should not add 'Any text' to the Simple Search as that could make CalmView search fields that you haven't chosen to display. If you need to search on 'Any Text', the Advanced Search is the correct place to do this, 'Any Text' is included as a default field.

The Configurator has frozen on an option I opened under 'Pages' and won't let me open anything else. What can I do?

This was caused by a bug in an earlier version of the web.config file in the \CalmViewConfig folder. It has been fixed in fresh installs of CalmView, but if you installed on top of an earlier version it may not have been fixed. Open that web.config file in a text editor like Notepad (NOT the web.config file in the \CalmView folder) and find the line

reading <globalization uiCulture="auto" />. Create a new line under this line, enter the following text, and save the file: <httpRuntime requestValidationMode="2.0" />

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Disclaimer

Please note: It is NOT recommended that you alter any CalmView files, other than those advised by the Calm Helpdesk or described in this manual. Axiell will not be held responsible for any data loss due to authorised changes.