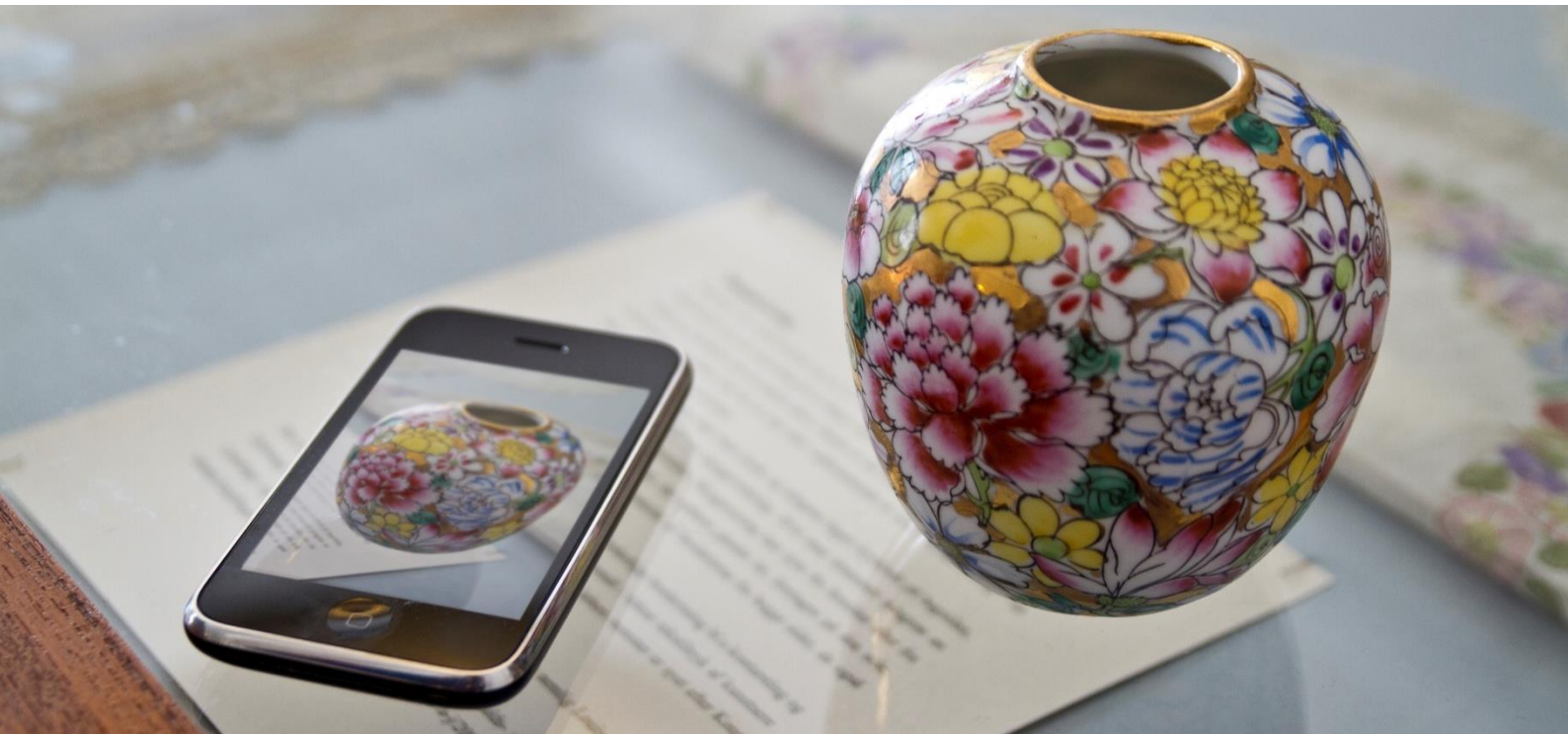




AXIELL MOVE



Axiell Move for Calm

User Guide

Axiell Move 3.0 for Calm 11.0 USER GUIDE

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Last Updated: 15 April 2019

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Chapter 1 - What's What

In this chapter you will learn about:

Configuring Axiell Move

Logging into Axiell Move

Screen Design

Basic Functionality

Navigation

This chapter walks you through the basic functions of Axiell Move for Calm so that you can quickly learn everything you'll need to move around the application. If you are ready to start entering data, please refer to the chapter *How Things Work*.

Overview

Axiell Move works with barcodes and RFID tags to efficiently process location changes for objects and items in the Calm catalogue, and packages. The application is designed to work “live” and immediately update your Axiell database with the latest information about the movement of collection items. **NOTE in this document the term “object” is synonymous with any item that exists within the Calm catalogue. It used as a default term in this guide to refer to anything in the Calm catalogue which has (typically) either a RefNo or an ObjectNumber. Since the Move app terminology is currently set to use “object” and “package” rather than “item” and “container” respectively, we have used the Move app terminology here.**



Axiell Move supports the following actions:

- ▶ Move objects individually.
- ▶ Pack objects in packages/containers (hereafter only referred to as packages).
- ▶ Nest packages within packages.
- ▶ Unpack objects or packages in a new location.
- ▶ View descriptive information about an object, package, or location.

When any objects or packages are scanned into a new location, the information is automatically added to the database. Before using Axiell Move, all objects should already be barcoded and all packages, trays, crates, etc should be logged in the Locations database.

Training

A 1 day “Pack It Up” class is available for sites that prefer a hands-on introduction to Axiell Move. Classes cover setting up Locations records, rapid entry of Packages, conducting moves, and inputting retrospective location information. Please contact the Help Desk for additional information on pricing and scheduling.

Assumptions

Axiell Move uses data from your Calm system. Before you can begin using the software, please confirm that you have the following elements completed:

- ▶ Location database records for all Locations
- ▶ Location database records for all Packages
- ▶ Catalogue database records for all objects to be moved
- ▶ Barcodes attached on tags or directly on Objects and Packages. For Location barcodes, these can either be attached to shelves or printed on a master list to be scanned.

Installation & Equipment

An Axiell Staff member can install the Axiell Move server components on your server. Alternatively, we can provide installation instructions. You can install Move on an iPhone by downloading the Axiell Move app from the Apple Store. Please note that the app is registered under the name “AdMove Client.” If automatic updates are configured for your iPhone, when a new version of the Axiell Move app becomes available, it will be installed automatically. Your settings and user history will be saved so that you may continue with your work immediately after the update.

Axiell Move currently runs on an Apple iPhone 5 and upwards, iPod Touch 5 upwards, or an iPad. In the interest of brevity, this manual will use ‘iPhone’ instead of mentioning each possible device that could be used. At this time, we recommend using a Linea Pro 5 scanner sleeve (or Infinea Tab M for iPad Mini and iPad Air), although it is possible to use the iPhone’s camera instead. Both the phone and the scanner sleeve will need to be charged on a regular basis. We recommend placing the devices in the charging cradle at the end of each work day.

Barcodes

It is up to each site to determine how barcodes are created. We have included some general information for guidance, but we strongly encourage each site to test out sample barcodes and labelling methods to confirm that the scanning process works as designed.

Printing Barcodes

Sites have multiple options for printing barcodes. Pre-printed barcodes can be purchased from third-party vendors or generated using programs such as Crystal Reports, BarCodeWiz, or IDAutomation's Native Barcode Generator.

We are aware of sites using barcodes with fonts as small as 10 points, but most sites seem to be using 12 – 14 as a standard.

Calm Databases in Axiell Move

Axiell Move involves three databases in Calm - the Catalogue database, the Locations database, and the Movement database. The databases are discussed again briefly in the *Managing Location Data* section later in the manual and in additional detail in the main Calm manual.

Catalogue Database

The Catalogue Database holds records for each object in your collection and more information about those objects. This is also where links to Location and Movement records can be made. Each object that you wish to record a location for must have a record for itself and this record must be in the Catalogue Database. This means that if you wish to store parts of a collection or object in different places, there must be a record for each of those parts. This

record does not have to be fully documented, but it should have all mandatory fields filled out as well as a Barcode and RefNo or ObjectNumber so that it can be identified. Note records in the Accessions database cannot be given locations with Axiell Move.

A typical Calm record with Current Location, Normal Location and Barcode field is below:

Field	Value
Barcode	SC000001
Repository	Special Collections
Collection	John Smith Archive
Title	Rate book
Ref No	RB/1/1/1
Date	1835
Current Location	Loc999
Normal Location	Storage Room 1

On a catalogue record, the Move app updates only the current location field. The only other editing possible is when an image is taken through the Move app; this is uploaded to the multimedia field.

Locations Database

The Locations Database manages data about the physical locations where objects can be stored. This includes both locations (that is, a static storage location such as a room or shelf) and packages (a movable storage location such as a box). By tracking information such as loading dock size, elevator availability, and light levels, staff members will be able to provide specific details regarding e.g. loan and exhibition venues, as well as facility data needed for insurance purposes. Any sub-levels for Locations can be linked together hierarchically.

A brief location record (linked to the catalogue record above as a current location for example) may look like:

Field	Value
Location Reference	Loc999
Barcode	L000001
Location	Bay1/Shelf1/Box1

Note the LocationReference field is the unique identifier field in the Calm Locations database for that specific location record. It is different from the Location field which is the descriptive label for that location. These two values may be the same (sometimes done as it is the LocationReference field which is displayed on the catalogue record).

So, the brief location record linked to the catalogue record above as a normal location looks like:

Field	Value
Location Reference	Storage Room 1
Barcode	SR000001
Location	Storage Room 1

It is up to customers if they wish the LocationReference and Location fields to show the same content, but the LocationReference field **must** be unique.

The Move app does not update any data on a location record.

Movement Database

Axiell Move creates records for object location change in the Movement Database. The Movement Database describes each movement of an object including when the object was moved, where it was moved, why it was moved, who authorized the move, and who physically moved it. **Each time an object is moved - either by using the Location button on the Calm catalogue button strip, or by using the Move/Pack options in the Move app - a new Movement record is created. It is not possible nor is it desirable to create a Movement record manually, rather they are all generated automatically by Calm/Move.** Each object's movement history can be viewed by clicking the Movement tab at the top of the catalogue record or searching the Movement database. The movement process is normally based around a change to the current location in Calm.

The movement history for the catalogue record above is displayed by clicking on the Movement tab at the top of the catalogue record. This displays a hitlist of all movements associated with that record:

RefNo	Old_Location	New_Location	Move_Type	Moved_By
RB/1/1/1		Loc451	Normal	AXIELL\MalcolmH
RB/1/1/1	Loc451	Storage Room 1	Normal	AXIELL\MalcolmH
RB/1/1/1		Bay1/Shelf1/Box1	Current	AXIELL\MalcolmH
RB/1/1/1	Bay1/Shelf1/Box1	Loc999	Current	AXIELL\MalcolmH

IDENTITY

RefNo: RB/1/1/1

Old Location: Bay1/Shelf1/Box1

Moved By: AXIELL\MalcolmH

Reason: Searchroom request

Movement Contact: J Smith

Movement Method: Handcarried

Movement Reference Number: HoP123

Movement Note: Handle with care

Record ID: 46e78371-afd0-44fd-9a7d-61e641ca23fc

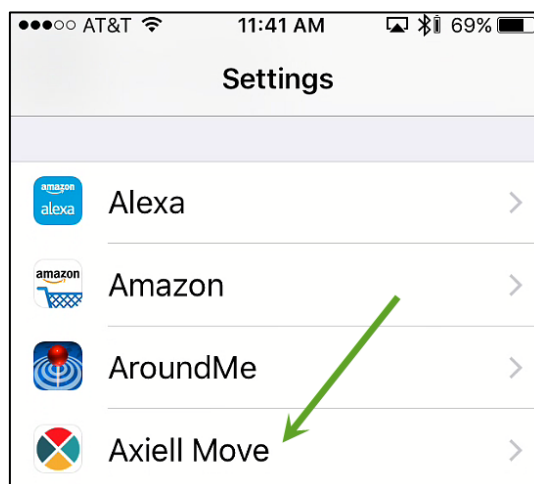
Move Type: Current

New Location: Loc999

Removal Date: 15/04/2019

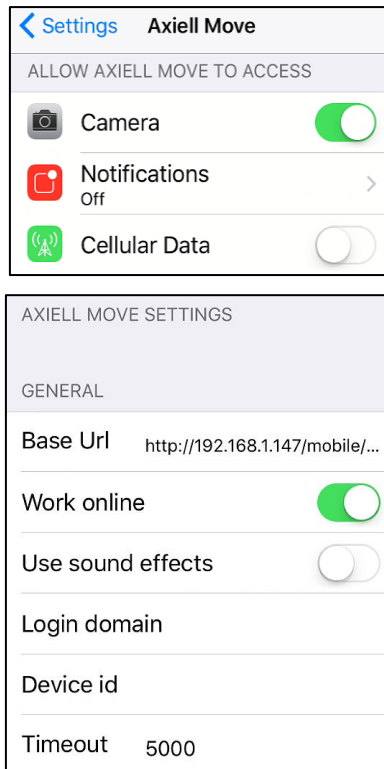
Configuring Axiell Move

Axiell Move uses an API called Calm Move Server to communicate with your Calm database. The information about the connection and the location of the Axiell Move Server components is managed on your device in Settings. For information about server settings determined during installation, please refer to the *Setting up an Axiell Move Server* section later in this manual.



Axiell Move Settings

The Settings for Axiell Move control whether the Camera can be used to scan barcodes, notifications are active, and if cellular data connections should be used if the device goes offline. They are also used to specify how Axiell Move communicates with the database.



Axiell Move Configuration Settings

Camera

The Camera setting indicates whether the camera can be used in place of the scanning sleeve to read barcodes.

Notifications

Use Notifications to indicate if you would like to see Axiell Move alerts in the notification centre and on the lock screen of the iPhone. This setting also controls the display of the count of any unsynchronized transactions that are currently stored on the device.

Cellular Data

In the event that a wifi connection is not available, Axiell Move will remain online if the device is set to allow use of cellular data. Please be aware that this assumes that the device is affiliated with a mobile device phone plan.

Base URL

This string holds the connection information to the database.

http://<IP address>/calmmoveserver/handler

Connection Information

Please see your System Administrator for this information.

Work Online

The devices may be set to default to online or offline use. Users may opt to set the device to work offline to preserve battery use in cases where no wifi or cellular access exists. This often happens inside Vault areas where wifi connections are often very weak.

Use Sound Effects

Axiell Move may be configured to beep after a successful scan. To suppress the sound by default, change the setting to off.

Login Domain

If your Axiell Move system is using Active Directory authentication, the name of the local network domain is entered here. In all other cases, this field will be left blank.

Device

At some sites, the device used for the scan as well as the username is recorded.

Time Out

This is the number of milliseconds Axiell Move will try to process a transaction before a request will be cancelled. Sometimes the server can be so busy that it might take a long time before your transaction or search is executed. To prevent the client from waiting forever, a time-out interval is used. For example, 5000 milliseconds means that the request will be cancelled after 5 seconds. We recommend setting this value to 15000 or higher. If you are not sure if a transaction has timed out, we suggest that you search the Calm database to verify whether the data was updated.

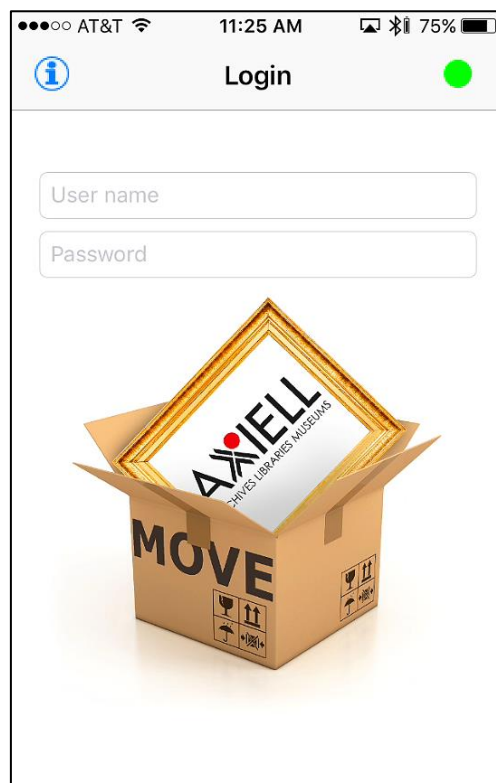
Logging In

To log into Axiell Move, use the Axiell Move icon.



Axiell Move Icon

When Axiell Move launches, it displays a login window.

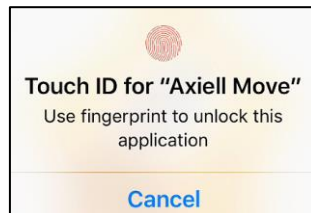


Logon Screen

Type your Calm username and password (supplied by your Calm Administrator through setting Calm Security, for more details on how to set security in your Calm application please see the online Calm v11 manual at http://www.dswebhosting.info/Documents/Manuals/ALM/V11/main_menu/administration/security.htm) and press ENTER on the keyboard. If Calm does not prompt you for a username and password when you open it, you

should enter your Windows username and password here. Please note that Axiell Move stores the last 10 user logins and encrypted passwords in the event that a user needs to log into the application while it is in offline mode. Axiell Move may also be configured to use fingerprint logins.

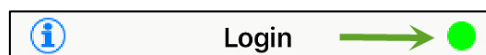
If you find that the Move app presents an invalid username or password message, we recommend you shut down the app (using standard iPhone close apps swiping, and try again).



Fingerprint logins

Connection Status

There is a status indicator in the upper right corner of the login screen. Green means there is an active connection to the database; amber means it is checking the connection; red means the device is offline; blue means that the system is processing a command and is in "thinking" mode.



Connection Status

Axiell Move checks the connection status every 5 seconds to verify that there is still a connection to the Axiell Move server. If the Wi-Fi connection fails, Axiell Move attempts to use Cellular Service (3G/4G). If no connection is possible, the system goes into offline mode.

Working Offline

If you are working offline, changes are temporarily stored in a transaction log file on the device. The transaction log file is accessible in the Sync option. During offline work, there is no "live" connection to the database. Axiell Move continues to support scans, but it will not display corresponding identifying information about the object, package, or facility. Working offline has minimal risk, but it does mean that Axiell Move cannot alert you if your move conflicts with information in Calm.

Using a VPN Connection

Security practices at most sites mean that mobile devices cannot access the database server from outside the organization's network without a VPN connection. Please contact your system administrator to configure VPN access for your device if you would like to work in this type of environment. Further reference may be made to the Axiell Helpdesk

Connection Information

The connection details specified in Settings may be viewed in read-only format by clicking the Information icon in the upper left corner of the Login screen.



Connection Summary

If these settings need to be changed, please exit the application and adjust the properties in Settings for Axiell Move, as discussed above.

Scanning Barcodes

There are multiple ways to scan barcodes:

- ▶ Scanning sleeve
- ▶ Camera
- ▶ Manually key in the code

Scan with Sleeve

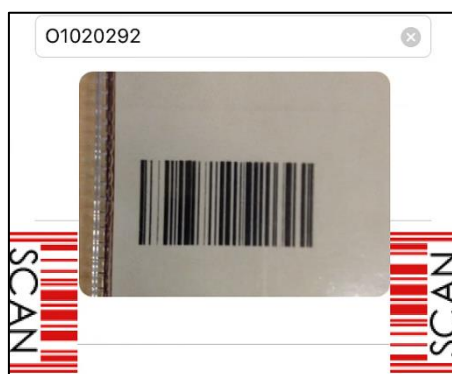
To scan a barcode using the iPhone / scanner combination:

- ▶ Aim the scanner at what you want to scan. Do not hold the scanner too close.
- ▶ Press the button on the top of the right side of the scanner sleeve.
- ▶ When you hear a beep, release the button.

The scanner only works when removed from the charging cradle and if the Axiell Move app is active.

Scan with Camera

The camera on the device may also be used to scan barcodes. To activate the camera for a scan, tap one of the red SCAN icons on the left or right of the screen. The camera activates and you will be able to take a picture of the barcode. The SCAN icons are only visible on certain screens.



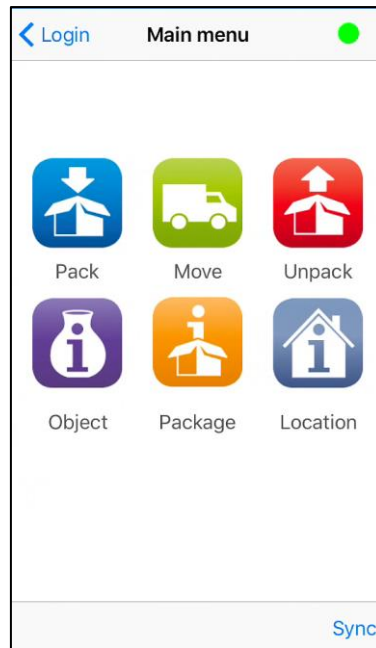
Scan Icons

Manual Scan

You may also manually type in a barcode. This is sometimes necessary if the barcode on the package or object has been damaged.

Feature Summary

All Axiell Move actions are initiated from the main screen. There are 2 types of actions: transactions and references. Transactions manage movements. References help you view summary information about an object, package (container), or physical location.

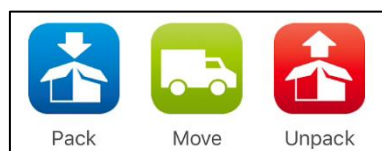


Axiell Move Main Screen

The Sync option in the bottom right corner of the Main menu opens the Synchronization screen. This option is always available so that you can check any logged transactions.

Transactions: Pack, Move, or Unpack

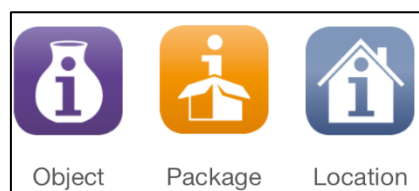
The transactions managed in Axiell Move are packing, moving, and unpacking. Choose *Pack* to link objects to packages or to nest packages within each other. Choose *Move* to move individual objects or packages. Choose *Unpack* to remove the link between objects and a package.



Transactions

References: Identifying Objects, Packages, and Location

Axiell Move also provides identifying information about an object, package, or location. These three descriptive options are only active when there is a connection to the Calm database and you are working online.



References

If you are online, you can retrieve identifying information about objects, packages and locations from the database using the *Object*, *Package* and *Location* icons in the *Main Menu* of Axiell Move. This allows you to check for example whether the object or box in front of you is actually what you think it is. Once you click the Object, Package, or Location icons, click the < option to return to the previous screen. Note there is no quick navigation back to the home

screen in the current release version of the Move app. You need to click the < option multiple times to return to the home screen.

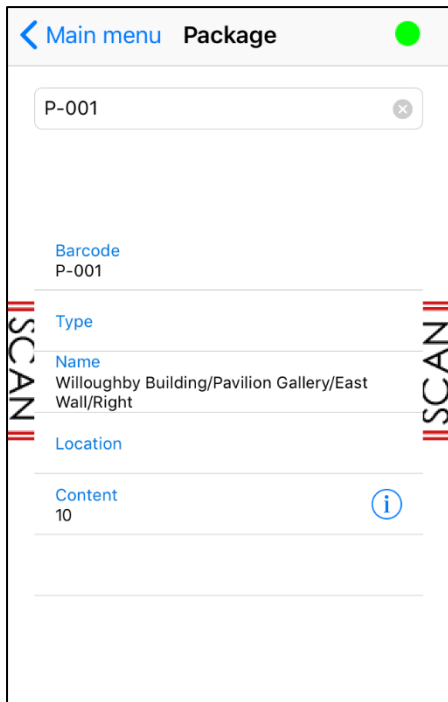
Identify Object

To confirm that the object you are viewing matches what is listed in the database, select *Object* and scan the barcode or RFID tag. Core identifying data will be displayed. Please note that you may need to scroll down the page to see the full image for the object. The fields displayed on the Object page are controlled in the setup files for Axiell Move. Please see the *Axiell Move Configuration Options* section for additional information. We have improved the defaults supplied here and customers can add new ones.

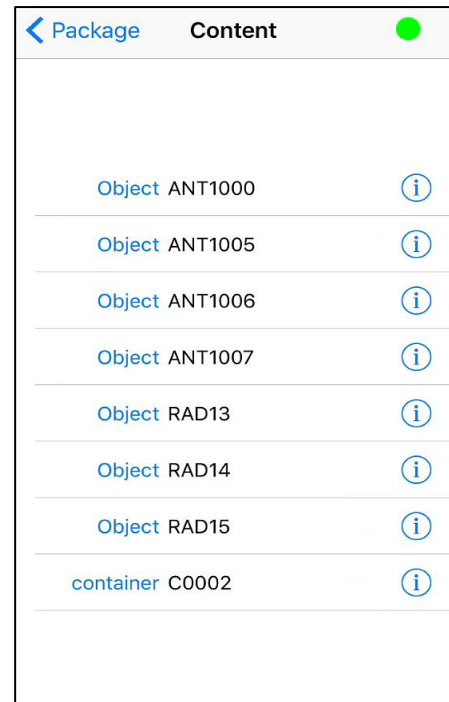


Identify Package

The Package option enables you to see a description of the package as well as a count of the items which are registered as being inside the package. To the right of the Count field, click the ⓘ icon to display a list of anything packed inside the package. Clicking ⓘ from this secondary screen displays additional information about the individual objects and packages.





Package Info



Content within Package

Identify Locations

The *Location* options lists the packages and objects which are noted as currently being in a building. Within the *Content* heading, click the  icon to display a list of packages associated with the record. Clicking  from this secondary screen displays additional information about the individual objects in each package.

Chapter 2 - How Things Work

In this chapter you will learn how to manage location changes for objects and packages.

Move Objects Individually / Move a Packed Package

Pack Objects in Package / Nest Packages

Unpack Objects / Unpack Packages from Packages

Sync Offline Transactions

Move Objects Individually / Move a Packed Package

NOTE In order for the Move app to process movements into Calm, the MovementMethod field in the Calm Movement database requires that the term "Axiell Move" (with a space) is added to the field picklist.

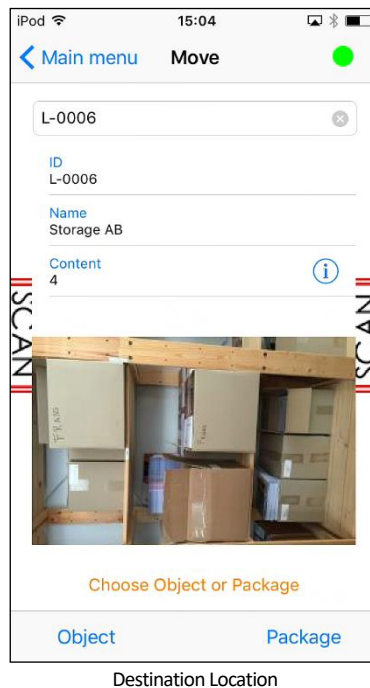
The same set of screens is used whether you are moving objects "as-is" or you are moving packages that already have objects packed inside.

To move one or more objects OR to move a package:

- ▶ Select the *Move* option in the *Main menu*.



- ▶ The *Move* screen displays. Scan the barcode for the location the object or package will be moved to, or type it and press Return. This is typically a barcode for a shelf, rack, room, or building. If the barcode cannot be found in the database, an alert message is displayed.



- ▶ Once the barcode for the Location is processed, specify whether the move is for an individual object or a package by clicking the appropriate word at the bottom of the screen.
- ▶ Depending on your choice in the previous step, you will either scan the barcode of an object or scan the barcode for the package and verify any retrieved data. If the Sound Effects setting is "on," you will hear a beep.
- ▶ If you wish to move another object or package into the same location, continue scanning until you are done with moves for the current location.
- ▶ When you are done, click the < option until you return to the main menu.
- ▶ Each one of these *moves* will create a corresponding Movement record in Calm.

Pack Objects in Package / Nest Packages

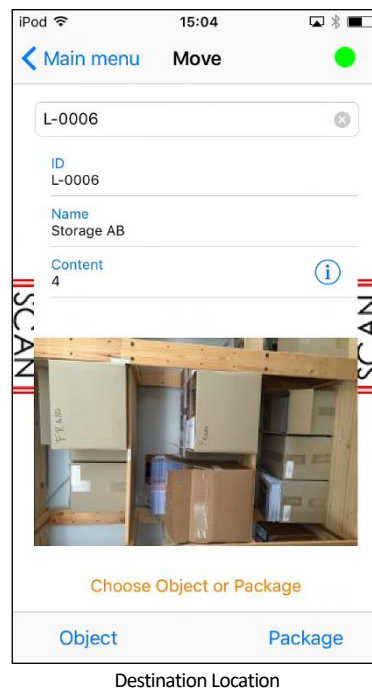
The PACK screens are used whether you are placing objects into packages or you are placing packages into a larger package.

To pack an object or package into a package:

- ▶ Select the *Pack* option in the *Main menu*.



- ▶ The *Pack* screen displays. To put an object into a package, scan the barcode for the package into which the object is about to be placed OR to put a package inside another package, then scan the barcode for the package into which the smaller package is about to be placed. If the barcode for the destination package cannot be found in the database, an alert message is displayed.



- ▶ Once the barcode for the "holding" package is processed, specify whether the move is for an individual Object or a smaller Package by clicking the appropriate word at the bottom of the screen.
- ▶ Depending on your choice in the previous step, you will either scan the barcode of an object or scan the barcode for the package and verify any retrieved data. If the Sound Effects setting is "on," you will hear a beep.
- ▶ If you wish to put another object or package into the same destination package, continue scanning until you are done packing.
- ▶ When you are done, click the < option until you return to the main menu.
- ▶ Each one of these *packs* will create a corresponding Movement record in Calm.

Unpack Objects / Unpack Packages from Packages

There are 2 ways to unpack objects or remove smaller packages from larger packages.

- ▶ Use the *Move* screens to process location changes as you remove the object or packages from a package.
- ▶ Use the *Unpack* screens to process location changes. The *Unpack* screens have an extra option which allows users to mass change the locations for all materials inside a package. Rather than scanning the barcodes for each object or package inside a package, the "All" option automatically creates a location change for the contents of a package with a single action.

Both options yield the same results.

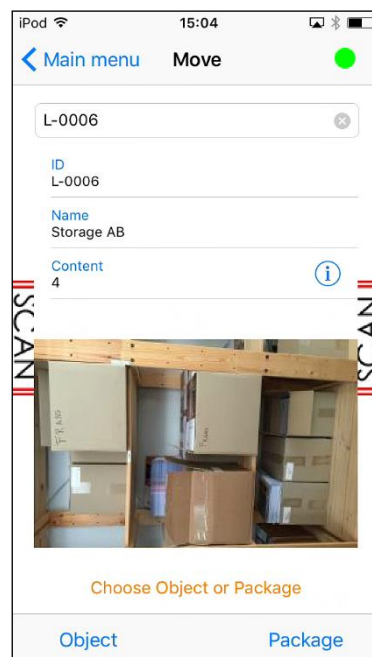
To unpack materials using the *Move* screens, see "Move Objects Individually / Move a Packed Package", above.

To unpack materials using the *Unpack* screens:

- ▶ Select the *Unpack* option in the *Main menu*.



- ▶ The *Unpack* screen displays. The *Unpack* screens have an extra option: Object, Package, and All. All is used to move all objects inside a single package at once to a new location.
- ▶ To remove one object from a package at a time, scan the barcode for the location where the object is about to be relocated to OR to remove a package from inside another package, scan the barcode for location where the smaller package is about to be placed. If the barcode for the destination location cannot be found in the database, an alert message is displayed.



Destination Location

- ▶ Once the barcode for the new location is processed, specify whether the move is for an individual Object or a smaller Package by clicking Object or Package at the bottom of the screen.
- ▶ Depending on your choice in the previous step, you will either scan the barcode of an object or scan the barcode for the package and verify any retrieved data. If the Sound Effects setting is "on," you will hear a beep.
- ▶ If you wish to remove another object or package, continue scanning until you are done unpacking.
- ▶ When you are done, click the < option until you return to the main menu.
- ▶ Each one of these *unpacks* will create a corresponding Movement record in Calm.

Sync Offline Transactions

If you have been working offline, your transactions will be stored temporarily in a transaction log file on the device. If you do not go back online after your current session and synchronize your offline transactions, Axiell Move will attempt to synchronize the transactions the next time the app is started. When this happens, you may notice a red badge with a number attached to the Axiell Move icon: this alert indicates that offline transactions are stored on the device.



Axiell Move Icon with one unprocessed transaction

You then have the following options:

- Direct synchronization – Click the icon in the bottom left corner of the screen to synchronize immediately. Any transactions which can be completed will then be removed from the screen. Any transactions which cannot be completed will result in an error message and the transactions will be retained so you can attempt to fix the error and synchronise them again.
- Depending on the number of transactions, the processing can take a while. Once synchronization has been completed, the stored transactions will be removed. The number of processed transactions and the number of errors is displayed as well. The nature of any occurring errors will be shown too. Click Main menu to continue with your regular work.
- Postpone synchronization – If you don't want to synchronize just yet, for whatever reason, click Main menu to continue with your regular work. You can click the Sync option in the Main menu at any time to have the transaction log processed in the database still.
- Purge the transactions made offline – If you want to irreversibly delete all transactions made on this iPhone while you were offline, for instance because you've been testing Axiell Move and you don't want to process the changes into the database, then click the garbage bin icon in the Synchronization screen. Subsequently click OK to delete all transactions made offline or click Cancel to keep them. In the latter case you must decide later if you want to synchronize the data after all or remove it.

Location Processing Rules

Axiell Move uses established guidelines to support data integrity.

Every object move made using Axiell Move works the same as if the move had been conducted within Calm itself, using Calm's buttons and processes: the details of when the move happens, what location the item moved from,

what item moves, and what location the item is moving to, all are recorded on a movement record which is linked to the catalogue record and the location records. This way, the record of every movement is preserved.

Logging Out

When you are done with your Axiell Move session, exit the app by clicking the iPhone's home button.

Chapter 3 - Managing Location Data

Location data is managed using the Locations Database in conjunction with the Movement Database.

In this chapter you will review:

Differences between Locations and Packages

Movement records

Important Catalogue fields

Please refer to the main Calm manual generally for more information on locations and movements.

Location or Movement?

The Locations Database describes physical locations, where objects may be stored. These locations can be static storage locations (like a room or a shelf) or movable storage locations (like a box). The Movement Database manages a history of where an object has been.

Locations Database

The Locations Database manages information on storage locations. They can be either Locations (which are static storage locations) or Packages (which are movable storage locations). Location records can be linked to records in the Catalogue Database either through Axiell Move or through Calm. For Axiell Move to work, you must have records in the Locations Database.

Location Record Types

There are two record types in the Locations database:

- Location – these are meant to be used for static storage locations like a room, shelf, or wall
- Package – these are meant to be used for moveable storage locations like a box, crate, or tray

Both record types hold largely the same fields (although they can be customized to be more distinct). Axiell Move looks at the record type itself to determine if a location is a Location or Package.

You can tell which type of record it is by looking at the status bar at the bottom left of the Calm record screen. This will display either :Location or :Package.

Location Fields

The Locations database has many fields that can be used to record details of your storage locations and packages. The most important of these for Axiell Move are:

- BarCode – this field holds the unique identifier that corresponds to the barcode scanned by Axiell Move. It is possible to type the barcode number into Move using the keyboard as well, or alternatively type the LocationReference (if known) instead of the barcode to retrieve a record.
- CurrentLocation – The location that the object or package is in right now. This may often be the same as the Normal Location, but it may also be a research room, conservation area, exhibition space, or other location the object or package has been moved to temporarily. When you move an object or package with Axiell Move, this field is affected. Calm uses this field to link Package and Location records: if the same data is in a Package record's CurrentLocation field and a Location record's Location field, those two records are linked. This field only appears on packages.
- LocationReference – this holds the unique identifier Calm assigns each location by default. This is not the same as the BarCode identifier, although it could be possible to use the same number in each. The LocationReference could also be the same as the Location (field described below). Calm uses this field to link Location records to Catalogue records. For a link to exist, the contents of Location and the catalogue's CurrentLocation field must be the same. This is also true for Movement records.
- Location – this is the location itself, expressed hierarchically (e.g. "Main Building/Basement Store/Bay 1/Shelf 4"). If this field is empty, Axiell Move can still work and locations can still be linked to items, but it is much harder for you (or any other user) to know exactly what the location is. Also, reports in the Locations database use this field to understand the relationships of locations to each other, so the reports will not work properly.

- Multimedia – if you want images of your locations to appear in Axiell Move when the location’s barcode is scanned, those images must be attached to this field. Multimedia fields do not exist on location records by default but can be added to them using standard Calm field insert processes.
- NormalLocation – The location that the package belongs in and can usually be found in. Axiell Move does not affect this field; if you wish to edit it, that must be done within Calm. Calm uses this field to link Package and Location records: if the same data is in a Package record’s NormalLocation field and a Location record’s Location field, those two records are linked. This field only appears on packages.

Movement Database

The Movement Database holds all the data about any location changes ever recorded for an object. Any location change processed through Axiell Move appears here as well as any data entered using the main Calm application.

Catalogue Database

There are hundreds of fields in the Catalogue database, but only a few of them are important in managing locations or using Axiell Move. These are:

- BarCode – this field holds the unique identifier that corresponds to the barcode scanned by Axiell Move. It is possible to type the barcode number into Move using the keyboard as well, or alternatively type the RefNo or ObjectNjumber (if known) instead of the barcode to retrieve a record.
- RefNo OR ObjectNumber – These are the unique identifiers used to link catalogue records to movement records: RefNo for Archive items, ObjectNumber for Museum items. Without data in these fields, Movement records cannot be linked to this item.
- CurrentLocation – The location that the item is in right now. This may often be the same as the Normal Location, but it may also be a research room, conservation area, exhibition space, or other location the item has been moved to temporarily. When you move an item with Axiell Move, this field is affected. Calm uses this field to link Catalogue and Location records: if the same data is in a Catalogue record’s CurrentLocation field and a Location record’s Location field, those two records are linked.
- NormalLocation – The location that the item belongs in and can usually be found in. Axiell Move does not affect this field; if you wish to edit it, that must be done within Calm. Calm uses this field to link Catalogue and Location records: if the same data is in a Catalogue record’s NormalLocation field and a Location record’s Location field, those two records are linked.
- Multimedia – if you want images of your items to appear in Axiell Move when the item’s barcode is scanned, those images must be attached to this field. Multimedia fields do not exist on catalogue records by default but can be added to them added to them using standard Calm field insert processes.

When an item’s barcode is scanned by Axiell Move, several fields appear to preview the item’s information. This is customisable by editing the admovserversetup.xml file in the application App_Data folder on the webserver.

Chapter 4 - Digital Files

In this chapter you will learn how Move interacts with digital files in Calm, including:

Viewing digital files

Uploading digital files

Viewing Digital Files

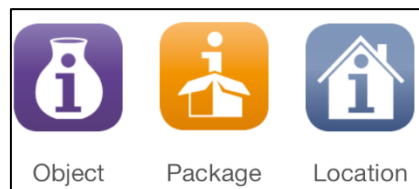
If a digital image is attached to an object, package, or location via the Multimedia field, it will be displayed in the Move app whenever that object, package, or location is on screen. If no image is displayed, it may be because it is attached to a field that is not the Multimedia field or it may be because no image is attached.

Uploading Digital Files

Using Move, it is possible to attach digital photos taken by iPhone to records for objects, packages, and locations. The end result will be the exact same as if an image had been attached through Calm: a copy of the image file will be moved into Calm's designated multimedia folder, it will be assigned a unique filename, a smaller thumbnail image will also be generated, and the image file will be linked to the Calm record. The image will be attached to the Multimedia field. A record does not need to have a Multimedia field at the beginning of the process. If there is no Multimedia field at the start of the process, one will be added to the record.

To attach a digital file to a record:

- ▶ Select the *Object*, *Package*, or *Location* option from the *Main menu* depending on which type of record you would like to use



- ▶ A screen displays with information about the record. Click the Photo button in the bottom right.



- ▶ The iPhone's camera will open, allowing you to properly frame a shot and then click the circular button at the bottom of the screen to take a photo.
- ▶ The photo you have taken will be shown to you. Click 'Use Photo' to attach it to the Calm record and return to the record you had been on.
- ▶ When you are done, click the < option until you return to the main menu.

Chapter 5 - Setting Up an Axiell Move Server

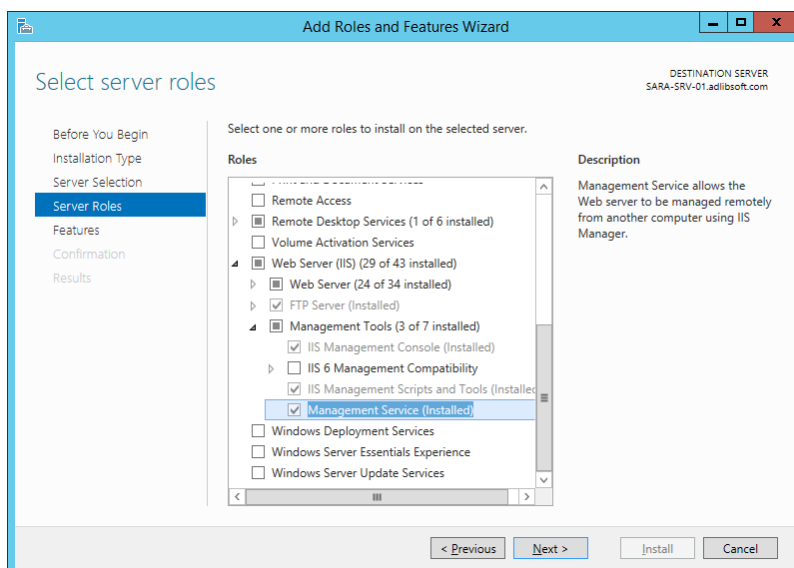
Move can be set up for you by Axiell, but it is also possible to set it up on your own.

Server Installation Requirements

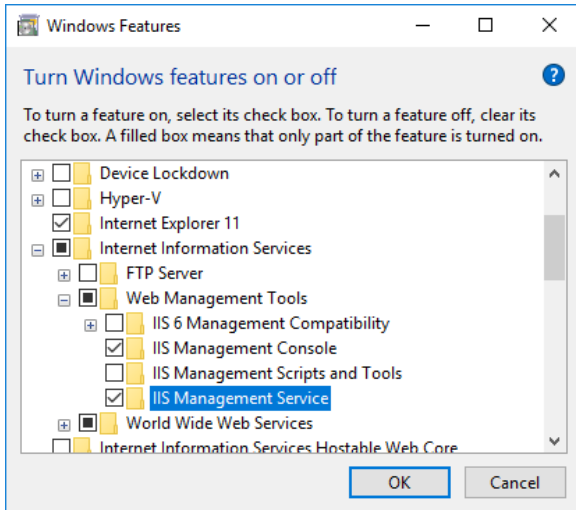
Server Installation Instructions

Server Installation Requirements

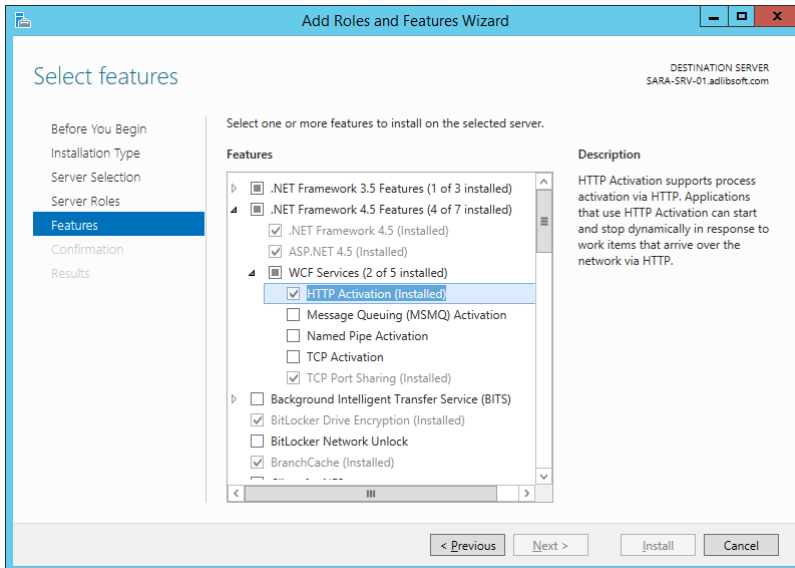
- Minimally Windows Server 2008 or Windows 7, within an Active Directory domain*, with at least 100MB free disk space.
- A Calm application version 11.0 or higher. The server version of Calm must be installed; the client version can also be installed but is not necessary. Security in Calm must be enabled through the Admin program; otherwise, anybody with access to the web server could view or edit data. Ports to the Calm server have to be open through the firewall (as with CalmView) to allow users to access Collections. For more information please contact the Axiell Helpdesk.
- The installation process for the Move Server is typical of installing software under IIS and should be straightforward for anyone with experience of using IIS Administration.
- HTTP server software must be installed on the server on which the web application will be placed, such as IIS 7.0 for Windows Server 2008 or [IIS 8.5 for Windows Server 2012 R2](#). For the required Windows versions, these services are probably already available but might still have to be enabled by setting the *IIS Management console* and *Management service* options for the web server. To do so, open the *Server Manager* and on the *Dashboard* click the *Add roles and features* option. Then under *Server Roles*, look up the relevant *Web Server > Management tools* options and mark them if necessary.



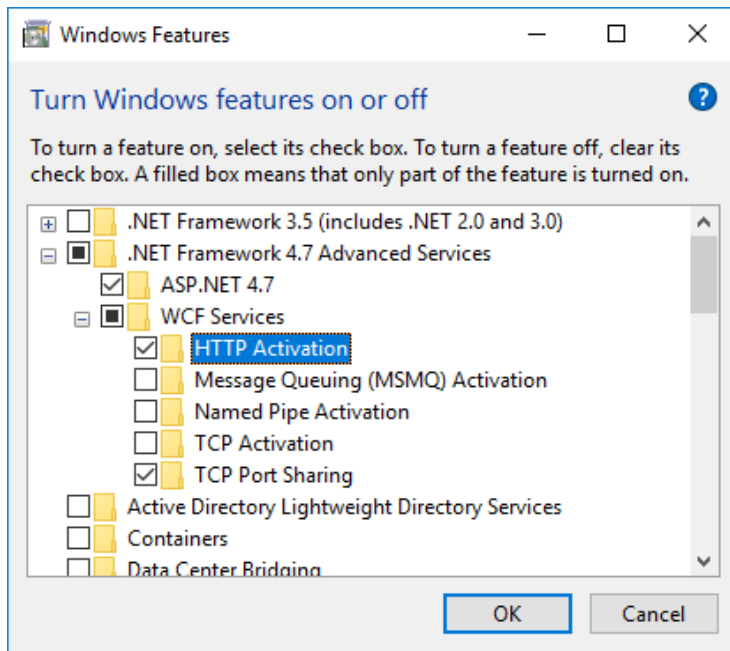
In Windows 10 you would do this via the *Windows Features* dialog (*Control Panel > Programs > Programs and Features > Turn Windows features on or off*).



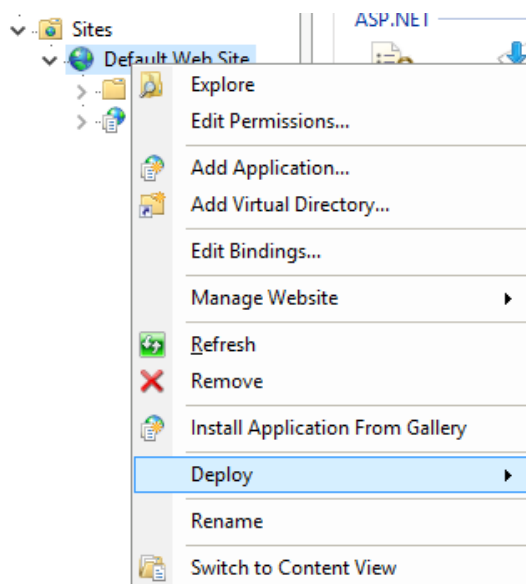
Further, make sure that (under *Features*) for the .NET Framework the *WCF Services > HTTP Activation* option is marked.



In Windows 10 you would find it in the *Windows Features* dialog.



- The IIS *Web Deploy* extension should have been installed on the IIS Server. In IIS you can check whether the extension is already available or not, by right-clicking the *Default Web Site* to open the pop-up menu: if the *Deploy* option is present in the options list, the extension is present. If not, download and install the latest version (choose the 64-bit version for 64-bit Windows) from <https://www.microsoft.com/en-us/search/result.aspx?q=web+deploy>. Restart IIS after installation and check if the *Deploy* option is present yet. (If you've marked the web server *Management Service* option (see previous requirement) *after* installing *Web deploy*, you may have to run the *Web deploy* installation again and choose the *Repair* installation option. Restart IIS and check again.)



- You can deploy the Axiell Move Server in any folder, but by default it will be deployed in `C:\inetpub\wwwroot` with the web application name you provide during the deployment. Before you can start deployment, do make sure you have full access rights to the desired target folder, otherwise the application cannot be deployed and you'll get an error message during deployment.

- The Microsoft .NET Framework version 4.0 (or higher) must be installed on the server, but only after IIS has been installed (with the latest security updates), otherwise some important features of ASP.NET will be missing from the installation. So, on a new server, **always** install IIS **before** you install the .NET Framework. For information about the .NET Framework, see: <https://msdn.microsoft.com/en-us/vstudio/aa496123>. (If the .NET Framework still has to be installed, then please take into account that the web server might need rebooting after this installation.) On IIS 7, ASP.NET must operate in integrated mode (which is the default configuration). The application pool which we will create for the Axiell Move application, must run in this mode.

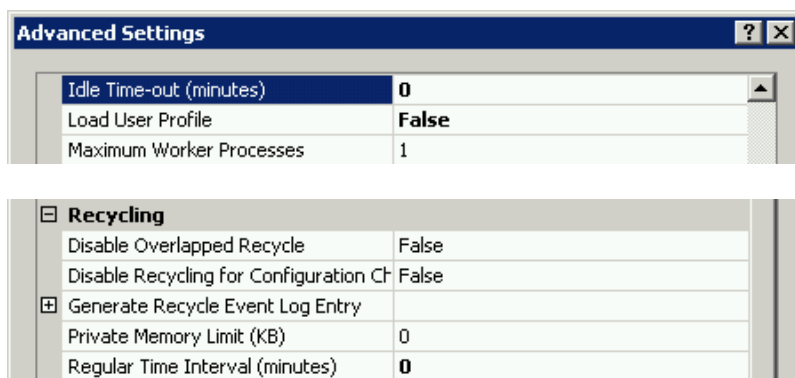
Server Installation Instructions

1. Axiell can supply you with the files needed to install the Axiell Move Server. Place this file in a folder on the server you intend to use for Axiell Move. Later during this procedure, the physical files of the web application will be installed in this folder if desired (name it appropriately in that case) or in `C:\inetpub\wwwroot`, depending on what you do in step 7.
2. Open IIS on the server and create a new .Net v4.0 application pool, `CalmMoveServerPool` for example, and leave the default basic settings (*Integrated* mode) as they are.



In the *Advanced settings* of the new application pool, either set the (*Process Model*) *Identity* to use the *ApplicationPoolIdentity* (*Built-in account*) or a custom (usually a general) Active Directory account, depending on your SQL server/network access rights.

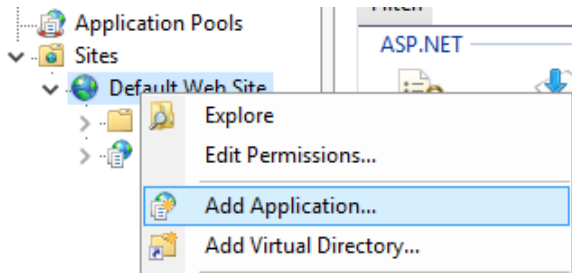
To increase performance on startup of Axiell Move, also set the (*Process model*) *Idle time-out (minutes)* and (*Recycling*) *Regular time interval (minutes)* to 0: this avoids unnecessary recycling of the application pool.



Also for performance improvement on startup, set the *Start Mode* to *AlwaysRunning*: this launches the worker process for the application pool as soon as IIS is started instead of launching it only when the first request for the web application is received. This option is available from IIS 8.

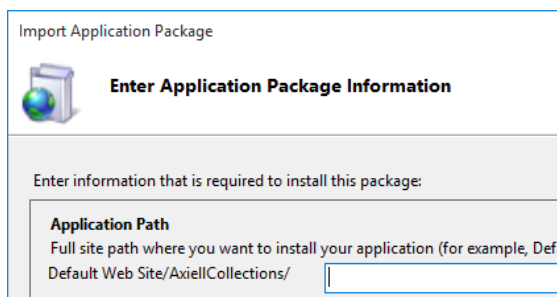
3. You must use HTTPS as the data transfer protocol. You would first need to acquire an SSL certificate from your local certification organisation and install it on the server. (In IIS you can find any installed certificates when you select the server in the left window pane and double-click the *Centralized certificates* icon.) Right-click your default website in IIS and select *Edit bindings* in the pop-up menu. In the window that opens, click *Add*, select the *https* binding type and then click the *Select* button to be able to select your SSL certificate. Next you'll have to redirect all HTTP requests to HTTPS, for example using [URL Rewrite](#), a plugin for IIS. Information about how to set up a redirect can be found elsewhere: [here](#) for example.

- In IIS, add a new application called `CalmMoveServer`, underneath the *Default Web Site*, assign it your new application pool and mark the *Enable preload* checkbox (available from IIS 8) to speed up performance.

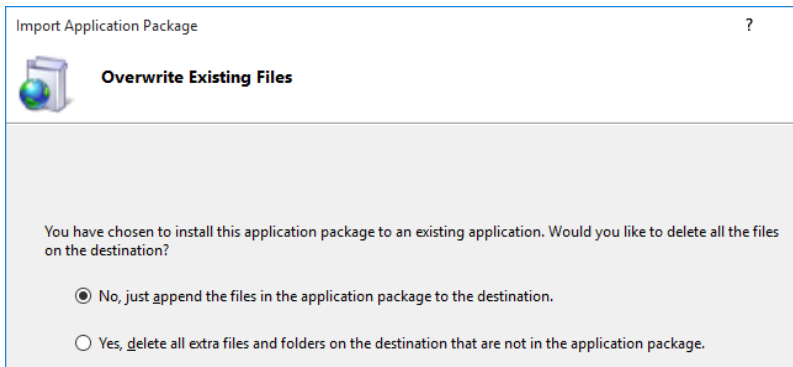


In the *Add application* window, use the *Test Settings* button to check whether a connection can actually be made.

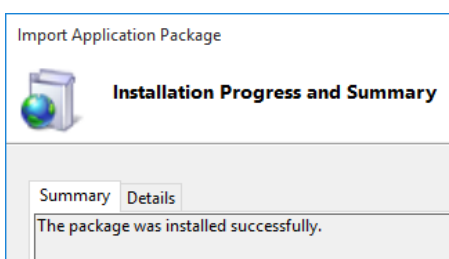
- Underneath the *Default Web Site*, your new application is now visible. Right-click the *Default Web Site* (if you'd like the physical files to be installed in `C:\inetpub\wwwroot\<my folder name>`) or right-click the application underneath the *Default Web Site* (if you'd like the physical files to be installed in the folder containing the deployment package) and select *Deploy > Import application*. (You must also do this when you are about to upgrade an existing installation of Calm Move Server).
- In the *Import Application Package* wizard that has opened, *Browse* to the Move Server deployment package provided by Axiell and open it. Click *Next*.
- In the following step, leave the selected *Contents of the Package* as is and click *Next*.
- In the *Application Path*, either remove any text from the entry field to deploy the application underneath the remaining fixed path (in which case the physical files will be installed in the folder containing the deployment package) or leave the suggested folder name in the entry field (or type a new one) to deploy the application there (in which case the physical files will be installed in `C:\inetpub\wwwroot\<my folder name>`). Click *Next*.



- In the *Overwrite Existing Files* step, choose the first option if you already have an Axiell Move installation in place on that location, which you'd only like to upgrade: any custom settings in `\App_Data\settings.xml` remain as they were. Conversely, select the second option if this is a fresh installation and any files and folders in the target location can be deleted.



10. Click *Next* to start the actual deployment now. After installation has finished, the wizard should report a successful installation. Click *Finish*.



11. In IIS, right-click your Axiell Move application and select *Explore* in the pop-up menu to open the installation folder in Windows Explorer. Open the `\App_Data` folder.
12. In the `\App_Data` folder you'll have to create a `Settings.xml` file (but only if you've installed Axiell Move for the first time). To do this, just copy and paste the `Settings.example.xml` file and rename the copy to `Settings.xml`. The `Settings.xml` file will have to contain some custom settings to tell the web application where to look for your application, amongst others.
13. If you wish to configure any settings, open the `Settings.xml` in a text editor like Notepad or Notepad++. The following Setting keys can be used to configure Move:

Version: The version of Calm you're running (e.g. version 11.0).

Server: The server Calm is located on.

Port: The port used to reach Calm. This is required if you are not running on default ports. The default TCP ports used to access Calm are 2143, 2144 and 2145.

User and Password: To access Calm, Axiell Move needs the credentials of a user who is set up in the Calm Admin program as an Administrator. The database must be accessible by both users of the Calm application on work stations, and by users of Axiell Move on iPhones. With Axiell Move you should be aware that Calm will be approached by means of a web service (specific to Axiell Move) via a general IIS user account. As that IIS user needs to be able to read and write in the database, it is best to assign it Administrator permissions. Put more simply, you need an Administrator user in Calm (either Application or Windows). If it is Windows, then this user *must* be the user that the IIS application pool runs under. This can be done in two ways:

- The best way to supply those credentials is by entering them into the Application Pool Identity section in step 2, above. This must be an active directory user who appears in the Admin program as an Administrator.
- It is also possible to use the `<user>` and `<password>` tags in the `Settings.xml` file, replacing `admin` with the username and `drum` with the password of a Calm user. This does not have to be an active directory user—it

can be a user created in the Admin program—and it does not have to be a user profile in use at your organisation. This is not secure, though, as this file is stored in plain text.

SecurityRequired: If this is `true`, Calm security must be enabled (in the Admin program) for users to log in to Axiell Move. If this is `false`, any users could log in with any credentials—Calm security will not be set up. For that reason, it is strongly recommended to only set this to `false` for certain kinds of testing.

14. Save the changes in the *Settings.xml* file and close it.

15. In IIS, right-click your new application pool and choose *Recycle* in the pop-up menu.

Access rights

User access is controlled using the Calm Admin program. Security must be enabled in the Admin program if the `<SecurityRequired>` tag is set to `true` in the *Settings.xml* file. If you are using Windows Active Directory logins to access Calm, any users that you would like to be able to access the Move app must appear in or be added to the *User* tab of the *Security* dialogue box in the Admin program. These users must be in a group with 'Edit record' permission, at least, to be able to use Move to make changes in the database.

For more information about access rights, see the Security section of the Calm manual, available within the program or online at http://www.dswebhosting.info/Documents/Manuals/ALM/V11/main_menu/administration/dsadmin/security_settings.htm.

Login

The installation is now complete. You can start using Axiell Move by entering the proper URL in the Base URL field in Axiell Move's Settings on your device. To check that the Move server is up and running, you can enter the URL of the Move Server in a web browser on your device: if the server is running and you are on the correct network, you will see the message 'Axiell Move Server is running'.