What's New in Calm 11.0 & CalmView 4.0

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1

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Table of Contents

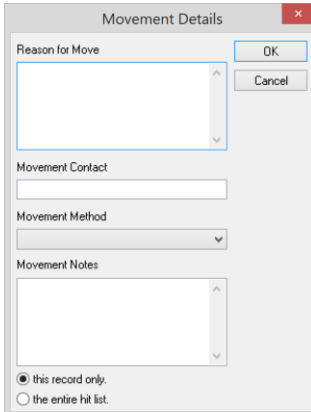# New Calm & Admin Functionality

An audit trail for archival location changes (and new location fields)

Whenever a location on an archive catalogue record is changed now, a record will be made of this change in the Movement database. This means that it will now be easy to audit the movement history of every archive item (if, for example, an item goes missing during a large move). Additionally, archive records now have two location fields, NormalLocation (for the location an object belongs in) and CurrentLocation (for the location an object is right now).

Because of this change, locations must now be changed using the side button strip—previously, it was possible to type into the archive Location field. However, if a location is typed in, rather than added using the side button strip, Calm will have no way to recognise that it has changed, and therefore will not create a movement record. Therefore, NormalLocation and CurrentLocation are read-only fields. The Location field still exists if you would prefer to have free-text location notation, although it no longer links to the Location database.

To move an item or a hitlist of items:

- Have the item or hitlist open in the catalogue
- Click **Location** on the side button strip
- Click **Normal Location** or **Current Location**
- Use the search dialogue box to find the location to move the item(s) to
- Fill in the Movement Details dialogue box that appears once you choose a location (this information will go onto the movement record)

- If you are moving one item, tick 'this record only' at the bottom; if you are moving a hitlist of items, tick 'the entire hit list' at the bottom
- Click **OK**

The item has now been moved successfully

To view the location history of an item:

- On the Archive Menu, open the **Movement Menu**
- Click **Search**

- Enter the RefNo of the item you would like to see a movement history for (you may have to add RefNo to the search dialogue box via the Administration Menu first)

No changes have been made to museum locations, which already worked this way.

Converting your old locations

Because Calm now links to locations using the NormalLocation and CurrentLocation fields, any data you have in the Location field in the catalogue will no longer link correctly. To fix this, Calm includes an update routine that will move the contents of the Location field to a field of your choice (probably the NormalLocation field, CurrentLocation field, or both).

Once you have upgraded to v11, you can run the update routine. Before doing so, **make a backup of your data** in case there are any problems with the update.

Be careful! This update routine will overwrite data in the field that you copy into. Unless you use both Location and NormalLocation or CurrentLocation on a single record, this will not be a problem (previously it was not possible to do this on an archive record and very unlikely it would be done on a museum record). To see all records with data in both Location and a new location field, enter the following into a command line search (accessible within the catalogue by pressing F6): (Location=*)&((NormalLocation=*)|(CurrentLocation=*))

To access the update routine:

- On Calm's main menu, click **Administration Menu**
- Click **Update Routines**
- Click **Mandatory**
- Click **Move Location to NormalLocation** and the Enter Details dialogue box will appear
- Fill this out as follows:

Choose the field you want to use for locations here. Probably this will be NormalLocation (for where an item belongs), although it could be CurrentLocation (for where an item currently is). If you would like to use both, you will need to run this routine twice (and don't tick 'Erase Source?' the first time)

If ticked, this will erase the original Location field. Erasing the field will result in tidier data

Tick this box. This will ensure the routine applies to all records in your database

Do not tick this box
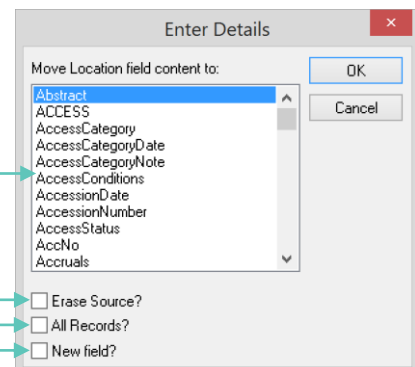
- Click **OK**
- Click **OK** in each of the two dialogue boxes which appear, telling you which field Location will be copied into and how many records will be affected

Support for barcode scanning to make location changes

If you wish to use barcodes to keep track of item locations—scanning an item's barcode and then a location's barcode to indicate that the item is moving to that location—the barcode-scanning app Axiell Move is now available for Calm. Some changes have been made to Calm to ensure that it supports this:

- BarCode fields have been added to the Catalogue and Locations database. If you do not use barcodes, these can be ignored. If you do use barcodes, they should hold the unique ID number of the barcode for that particular item or location
- A Package record type has been added to the location database. Currently, this does not work any differently to Location record types, although Axiell are exploring additional functionality
- Other changes, invisible to the user, have been made to the API to support Axiell Move

A new, stricter type of mandatory field

There is now a stricter type of mandatory field, the 'required' field. Required fields, as the name suggests, are required. You cannot leave a record without filling in all required fields on that record. This is different from the pre-existing mandatory field property, which would warn you that the field was empty but let you leave the record anyway.
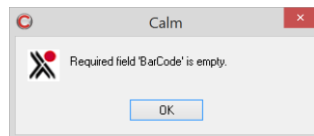
To set a field as required:

- Open the Admin program
- Click **File**
- Click Open to open the database the field is in
- Click **Field**
- Click **Properties…**
- Find the field in the list of fields at left and click on it
- Tick the box beside **Mandatory (Required)**
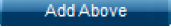
No fields are set as Required in the default version of Calm. The existing type of mandatory field is still available, but now referred to as 'Mandatory (Suggested)'.

A clearer way to add records to an existing hierarchy

When right-clicking a record in a tree, you can now select the **Insert Record** option. This will create a new record, give it the same identifying number as the record you right-clicked, and then increment the numbers of the record you right-clicked and those with a higher number than it by one. This can be used if you are trying to catalogue items in order (an 1885 ledger, an 1886-87 ledger, an 1889 ledger) and then realise you have missed an item that would belong in the middle of that sequence (a Jan-Jun 1886 ledger). If you right-click the 1886-87 ledger, this would increment the RefNos of the 1886-87 and 1889 ledgers by one and also create a record at the correct RefNo for the Jan-Jun 1886 ledger.
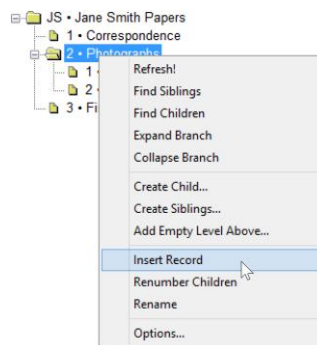
Insert Record is like the previous 'Increment Siblings' function, but its name has been changed to be clearer and also it now creates a new record with the chosen identifying number instead of leaving an empty space for you to fill.

Also, the 'Add Above' option on the tree menu has been renamed 'Add Empty Line Above' to avoid confusion with the Add Above button.

Copy multiple occurrences of fields with the FieldCopy script

If you need to move the contents of one field into another in a database (for example, if you had stopped using one field and wanted to use another instead), this has been possible using the FieldCopy script. However, FieldCopy would only copy the first occurrence of a field. If you were trying to copy a field like Subject which may have multiple occurrences, each for a different subject, every occurrence apart from the first would be left in the old field. Now, an 'All Fields?' tick box has been added to the dialogue box and, if ticked, will move each occurrence of the first field into a new occurrence of the second.
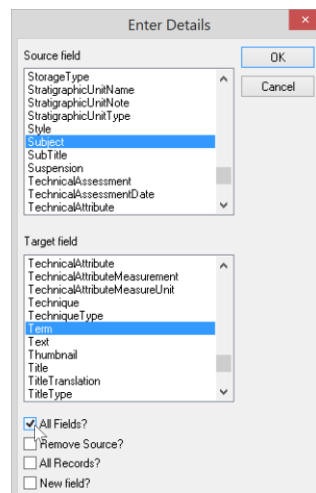
Updated ArchivesHub XML reports

Calm now includes three EAD XML reports for ArchivesHub. One, 'Archives Hub (EAD v1.0)', is an older template that has been left in for legacy reasons. The other two, 'Archives Hub (EAD 2002)' and 'Archives Hub Collection Level Only (EAD 2002)', contain current ArchivesHub

export mappings as of 22 March 2017. As always before preparing data for delivery, it is a good idea to check with ArchivesHub for the current recommendations and templates (https://archiveshub.jisc.ac.uk/calm/), as these may have changed since the release of Calm v11.

These templates can be used both to export data (open the top-level record of the collection you wish to export, then click File > Report… and choose the appropriate report) and import it (start in the Catalogue database, click File > Import… and choose Report as a method).

- **Archives Hub (EAD 2002)** is intended to be used to export an entire collection at a time. This is like how previous XML reports have worked in Calm
- **Archives Hub Collection Level Only (EAD 2002)** exports just the top-level record in collections. It is suitable for use if you do not wish to export detailed series-, item-, and other-level records in a hierarchy

Enlarged dialogue boxes for easier reading

Some dialogue boxes, such as the one used to choose which fields appear on the Overview, have been enlarged to allow you to view the full text of very long field names and also to view more fields at a time.
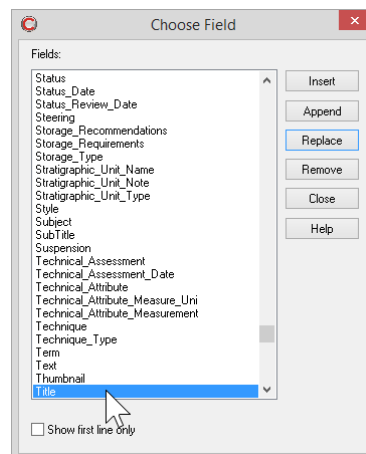
A faster way to re-order fields

You can now click and drag a field in the Field Order/Group dialogue box (accessible within Admin from the Field menu) to change its order on a record. For example, this could be used to move the NormalLocation field to the top of all records in the catalogue for easier reference. Previously, you would have to click the field and then repeatedly click 'Move Up' or 'Move Down'. Additionally, the dialogue box has been enlarged so you can see more fields at once.
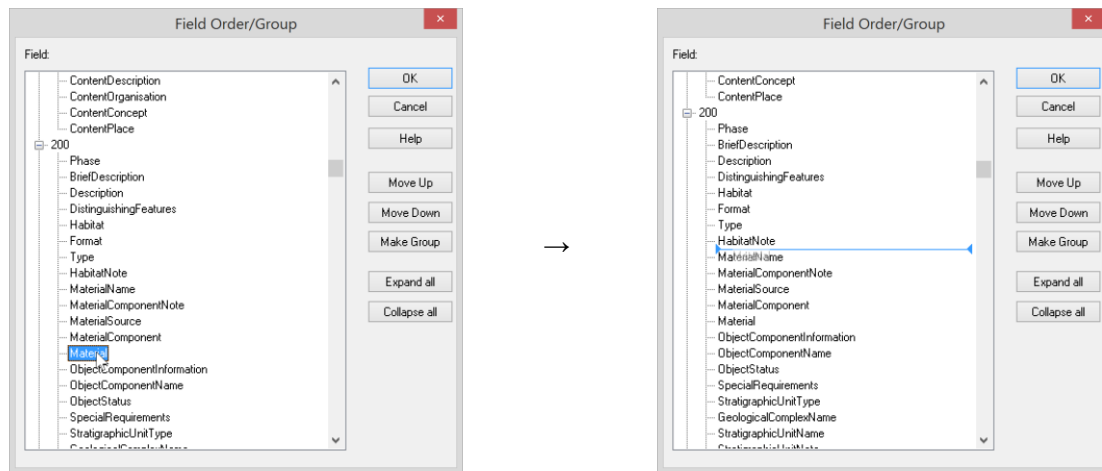
It is also easier to find fields in the list: if you click any field in the list, you can then begin typing the name of the field you are looking for and will be taken to it.

The ability to make groups of fields has returned, as well. Groups are shown in the dialogue box as a number with a + or – to its left (like '200', in the image above). To make a new group, click the **Make Group** button and a new group will appear at the bottom of the list of fields. You can then click and drag it, as you would a field, to where you would like the group to appear in the list. Fields can be clicked and dragged into this group, as well.

You can now make your own Multimedia fields

It is now possible to create Multimedia fields (which link to images, videos, audio files, and documents) in the Admin program in the same way that you can create Date, Line of text, Period, Number, and other types of fields. All databases already have a Multimedia field (named 'Multimedia') by default, so this option is best used if you would like to separate the files you are linking to records in some way (for example, to have a new field that holds images which you do not wish to be visible on CalmView while you keep the images that should be visible attached to the standard Multimedia field).

To create a Multimedia field:

- Open the Admin program
- Click **File**
- Click Open to open the database you want to create the field in
- Click **Field**
- Click **Define Types**
- Click **Add**

Multimedia will now be an option on the 'Add Field' dialogue box. Note that this replaces the option to create a Tree-type field which was never fully implemented.

A faster way to apply properties to multiple fields at once

Previously, the way to apply a property like making a field not indexed has been a slow process. You would have to open the Edit Field Properties… dialogue box (available within the Admin

program under the Field menu), select a field, and untick the index box, then repeat for every field you wished to change.

Now, at the bottom of the Field menu is an option called 'Property Editors'. If you hover over Property Editors, you will be able to choose the property you wish to apply and view a list of all fields that do have the property on one side and don't have the property on the other. Applying the property is as simple as selecting the field and clicking the 'Add' button. This makes applying a property to multiple fields at once significantly faster.
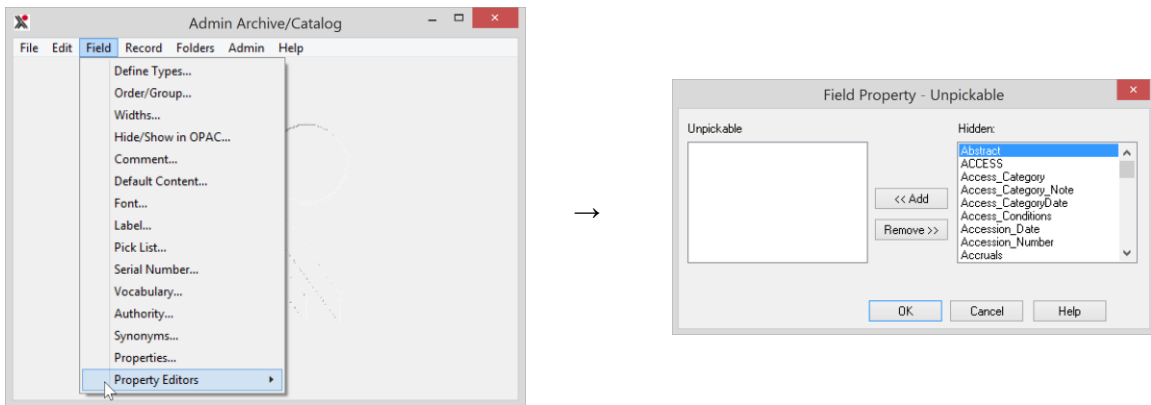
Two new diagnostic reports in Admin

The 'Index integrity check' and 'Detailed index integrity check' reports are designed to help diagnose issues around index corruption. You shouldn't need to worry about these—mainly, they are meant to give the service desk more information about issues you may be having. They are available in the Admin program, once you've opened a database, in the File menu under 'Report'.
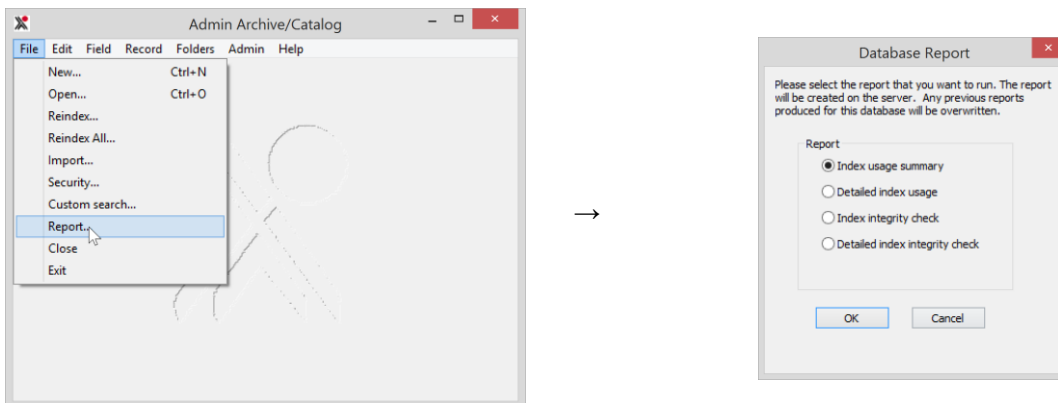
Other Calm & Admin Improvements

Calm v11 contains numerous fixes for bugs and other issues. Most notably, the Overview and XML reports (like the ArchivesHub EAD export) have received a large amount of development attention to stabilise them. A partial list of fixes made in v11 is below.

Issue	Fix
The HitListFill script accepted more text than it could add to a field, so when adding lots of text some may have been cut off	HitListFill will now accept only as much text as it can fill in
It was not possible to insert fields with very long field names using Field>Insert	Calm now correctly handles very long field names
Images linked using the Multimedia field were not appearing in the Images Overview	Multimedia images now appear in the Images Overview
In the Tree Menu, the default for 'Find record when clicking in tree', 'Select item in tree when loading record', and 'Sync tree with current record' were not selected by default and had to be manually selected	These options will now be selected by default in new installations of Calm
If you tried to run an EAD XML report from any level other than the top level, you would get an error message saying that CountryCode was missing	It is now possible to run an EAD report from any level in the hierarchy
On Windows 10, a title bar menu was appearing in the Admin program with buttons that didn't work	The menu has been removed
XML reports were having trouble exporting content if it was omitted	It is now possible to output optional fields properly
HTML reports would sometimes open in Internet Explorer instead of the default browser	HTML reports now open in default browser
'Help' buttons in the Admin program were not opening the correct help file	'Help' buttons now open the correct file
'X' in corner wasn't closing the Lookup Table dialogue box in the Admin program	'X' now closes Lookup Table dialogue box
F1 wasn't opening the help file	F1 now opens the help file
It was possible to enter letters into the Clone dialogue box and click OK, which would cause Calm to crash	If letters are entered and OK is clicked, no records will be created and Calm will not crash
Clicking 'X' on the Opening Times parameter dialogue box would open a new dialogue box instead of closing the existing one	Clicking 'X' now closes the dialogue box

Some important fields (like Code in the Persons database or EntryNumber in the Accession database) were not being treated as system fields by Calm	System field attributes have been applied to these fields
In the Admin program, in Security, users could not be set as 'Disabled'—upon leaving Security, the user would revert to 'Active'	Users will now remain as 'Disabled'
If a hit list was sorted and then a search was run using 'Exclude', different results would be found than if the hit list had not been sorted	Sorted and unsorted hit lists now return the same results when using 'Exclude'
When fields were saved on the 'Print labels' dialogue box, Calm would occasionally crash	Calm no longer crashes
File>Print>Overview could be clicked but would not work if the Overview was closed	It can no longer be clicked if the Overview is closed
Files linked to Calm records would fail to open in an external program on every other click	Linked files now open on every click
Importing an invalid XML file would cause Calm to crash	Invalid XML files are not imported
Clicking 'X' on the archive 'Confirm Loan' dialogue box would issue the loan.	It is no longer possible to click the 'X'
Issuing a hitlist of archive loans would not work—you would never be prompted for an 'end day'	This now goes through the whole process
XML reports were not running successfully, giving the error message 'Unable to open Persons for exclusive access'	XML reports now access permissions correctly and can run
If Edit>Find was run a second time for the same word in a very long field, it would highlight the word but take the user to the bottom of the record	Edit>Find now takes the user to the highlighted word
Increment Siblings wasn't working on trees with lots of records	Insert Record now works on large trees
When a record was imported from DScribe Natural, fields generated when a record saved (like PlaceEntry in the Places database) were not generated	When records are imported, these fields are now generated
The log file on installing Calm was the incorrectly numbered CALM-9.log	The log file is now CALM-11.0.log
When 'Find record when clicking in tree' was selected, clicking a record in the tree would only select that record in the Overview on every other click	Now when the record is clicked in the tree it will be selected in the Overview

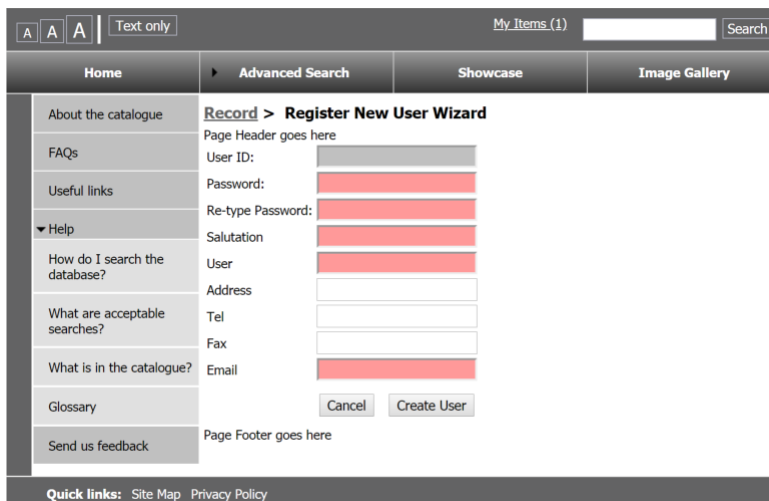|	
After adding columns to the Overview, changing its size would result in only 3 columns being visible	The Overview will now show all columns
It was not possible to hold down SHIFT or CTRL and click to select more than one record in the Overview	SHIFT- and CTRL-click now work with the Overview
Making field groups was not possible	Making field groups is possible
Some DScribe XML imports were truncating field contents	Filed contents are no longer truncated

New CalmView Functionality

Because of changes made to Calm's API to work with Axiell Move and Axiell Collections, organisations running Calm v11 must use CalmView v4 and organisations running CalmView 4 must use Calm v11.

Many improvements to document ordering and user registration

Many upgrades and changes have been made to the document ordering process, outlined below.

A user can now cancel in the middle of the registration process

There is now a cancel button at the bottom of the user registration page. If a user clicks that button, the registration process will be aborted and no partial user record will be created which must be cleaned up. To support this, all user registration fields are now on a single page instead of the two-page setup (page one for user ID and password, page two for contact information) which existed before. This also solves the problem of incomplete user records being created if a user abandoned the registration process after the first screen: now nothing is created until all fields have been filled out and the 'Create User' button is clicked.

Set up an expiry date for new user records

In order to comply with the GDPR and other data protection policies, you may wish to periodically purge older user records. CalmView now lets you set an expiry date for a user created through the user registration process so that you can periodically check for expiring user records to see if they should be deleted. The expiry date is filled into the Expiry field in the Users database.

To enable this, navigate to DataSource>Data Groups>CalmView>My Items in the Configurator and tick 'Give New Users Expiry Dates', then enter the number of days a user record should be valid in 'Days a User Record lasts', below it. For example, if you wanted user records to expire in two years, you would enter 730.

Send confirmation emails to users

Confirmation emails can be sent to users for registering an account or changing a password. You can turn these emails on and off, as well as set their subject lines, in DataSource>Data Groups in the Configurator. Data Groups now contains many other settings that you can use to set these emails up, as well.

The texts of each email can be altered in the configurator as well. The new user email text is accessed in Pages>Register User>newUserEmail. The password change email text is accessed in Pages>Register User>changedPasswordEmail. Each can be altered to what you would like the email to say. You can enter the user's name by typing {0}, the user's ID by typing {1}, and the user's password by typing {2}.

Auto-generate user IDs

Previously, users have had to create their own IDs when creating a user account. If you would prefer these to be automatically assigned, that is now possible. To do this, navigate to DataSource>Data Groups>CalmView>My Items in the Configurator and tick 'Auto-Generate new User IDs'. The 'User ID' field will be greyed out (as in the screenshot above) when a user is registering for an account. Upon creating an account, the user will be assigned a number in line with the serial numbers in the UserID field (in the Users database).

Use the user's name, rather than ID

Instead of the impersonal ID number, it is now possible to use the user's name in various places throughout CalmView. To show the user's name at the top of every page when that user is logged in (as below), navigate to DataSource>Data Groups>My Items in the configurator and change the field 'Page Header Welcome User By' from 'ID' to 'UserName'.
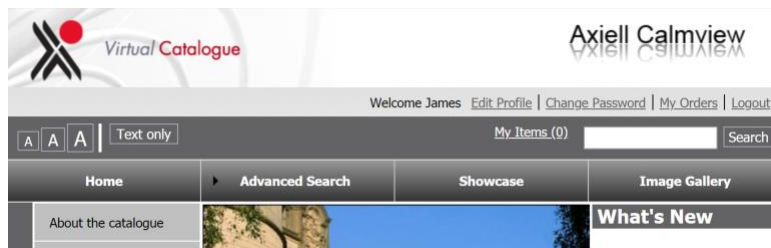
To display the user's name in the welcome message displayed when a user is registered for the first time, navigate to Pages>All Pages>User registration complete page in the configurator. Typing {1} in the 'Welcome text' field will insert the user's name and {0} will insert the user's ID, as below.
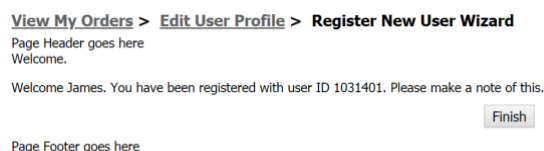
Please note the user will still need their ID to log in, so do not remove all references to it from CalmView.

See more (and different) fields in My Orders

The 'My Orders' section (available to a logged-in user by clicking 'My Orders' at the top right of the screen) had previously shown the OrderDate at the top of an order and two fields from the ordered items. Now, there are several possibilities:

- The DueDate can be shown at the top instead of the OrderDate. This is changed in DataSource>Data Groups>CalmView>My Items>MyItems_Label_DateDisplay in the configurator
- The column on the far left can hold a loan Id number (drawn from the ID field in the Archive Loans database) instead of an ID number from the Catalogue database. To make it show the loan ID, tick the box in DataSource>Data Groups>CalmView>My Items>MyItems_Label_ShowLoanID in the configurator. Note: this will override any field you have chosen for this column in DataSource>Data Groups>CalmView>My Items>Label field
- A third column of data about the item can now be shown, for example to add a Date field in addition to the Title field. To add a third field (like the Date field, below), go to DataSource>Data Groups>CalmView>My Items>Description Field 2 in the configurator and choose a field. If nothing is selected here, there will be no third column

Items a user has tried to order can be re-ordered

In the 'Past Orders' section (available to a logged-in user by clicking 'My Orders' at the top right of the screen), a user can see previous completed and cancelled orders. Beside each item in a past order there is now a Reorder column with a tick box. A user may tick any number of items there and click 'Add to Basket' to put the items in 'My Items' so they can be ordered again.

Un-orderable items can link the user elsewhere

Previously, if an item that was not orderable was added to 'My Items' by a user, the space where a tick box should appear (to select the item for ordering) was empty, as shown below.

15
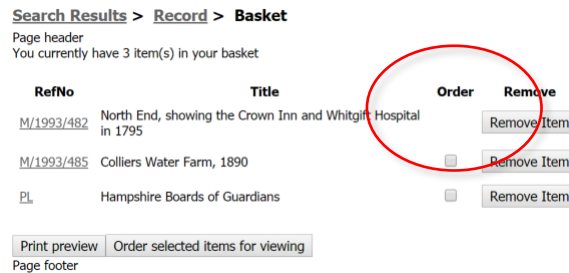
Now, it is possible to fill this space with a link—for example, to point a user to a site where it is possible to order reproductions, or to policies that explain why items are not orderable—as shown below.

To enable this, navigate to DataSource>Data Groups>CalmView>My Items>Offsite Ordering URL in the configurator and enter the URL of the site you wish users to go to. Any link entered will be used for every un-orderable record. If nothing is entered in this field, CalmView will display an empty space, as before.

Pages in a CalmView site can be indexed by search engines

In a default CalmView setup, search engines link to your copy of CalmView, but not individual pages (for individual records) within it. It is now possible for them to find and link to individual pages within your CalmView site if you edit the robots.txt file in the CalmView folder. To do this, replace '# Sitemap: http://www.myserver.com/sitemap.ashx' with 'Sitemap: http://[your CalmView domain]/sitemap.ashx' (note the absence of the initial #). For example, 'Sitemap: http://archives.hemdon.gov.uk/sitemap.ashx'.

This change was added as an update to CalmView 3.0 after its release, but has been integrated into CalmView 4.0 by default.

An easy way to display original images

If you would like to display an original image at its full size, with no watermarking or changes of format applied to it, this is now a setting available for CalmView images. In the Configurator, open Images>CalmView Images, choose the type of image you would like the setting to be applied to, and then tick 'Use Original Image File?' at the bottom of the screen. This will override any settings above including watermarking, so use it carefully.

.NET 4.0 behind the scenes

CalmView is now built on .NET 4.0 instead of the previous .NET 3.5. This should make no surface difference to you or users of your CalmView site, but it does ensure the program is more secure and stable overall.

Other CalmView Improvements

Issue	Fix
A level in a tree with no associated Calm record would cause an error when linked	Clicking does not cause an error
It was not possible to style individual fields in the record view	Each table row now has the field's name as an attribute, allowing CSS styling of specific fields
A space was missing in link tag to default.aspx	Space has been added
No Welsh flag available for switching language to Welsh	Welsh flag has been added
Very long words would run off the end of a table when viewing a record	Wrapping of long words has been implemented
If a search returned no results and document ordering was enabled, user would get an error 500	A more user-friendly message now appears
If a page header was entered into overview.xml, the Refine Search button would be misaligned	Refine Search no longer has a relative position so it should be correctly aligned
Terms and Conditions text (set in Pages>All Pages) did not appear during user registration	Terms and Conditions text now appears
It was not possible to translate the 'Refine Search' button into different languages	Refine Search is now translatable
Paragraph breaks were not shown on records	Paragraph breaks are now shown
Thumbnails were not generated for bmp images	Bmps now have thumbnails
If a search was run using the Term/Subject buttons, returning to Advanced Search and clicking the buttons again would produce an application error	Leaving Advanced Search, returning, and clicking Term/Subject is now possible
Top navigation bar buttons that had been removed were still visible in the text-only version of CalmView	The top navigation bar is now built from the sitemap; these options can be removed entirely
The password reminder page was misleadingly called 'reset password'	Page name and buttons have been made clearer
If the first word in a showcase description was 1 character, it could be put on the same line as the title	Showcase title line is now exclusively for the title
If an overview was reached by a direct link, clicking Next couldn't take you past the second page of results	Next will now take you through every page of the overview

If you attempted to remove the last field from the Quick Search, it was not possible to close the warning dialogue box that appeared	It is not possible to remove the last field from the Quick Search
If ordering was not enabled, an empty box would appear at the lower-right of the record view	Empty box no longer appears
If a user hit the maximum number of ordered items and ordered more, the order would not work but no error message explaining why would appear	An error message explaining why the order cannot be made appears
If an OrderRefNo was set for an item, CalmView would use the OrderRefNo but not check to see if it was already on loan	CalmView now checks to see if the item is available
If changes were made in the Configurator on any pages in the Pages section, they would not be saved and the Configurator would lock up	The Configurator now allows changes in the Pages section
In some cases, adding a footer to Advanced Search or Image Gallery would make it impossible to click the page	It is now possible to click the page if a footer is added
In some cases, opening a full-screen image would not return the MIME type, so the image would not be displayed	The image and its MIME type are now returned so it displays properly
Add to Basket button would not appear if 'Offline' ordering was selected	Add to Basket button appears if Offline or Calm ordering selected
Error messages would not show helpful information if attached images could not be shown	Correct error messages display
The safari.browser file was incompatible with CalmView when using .NET 4.0	The file has been removed
If 'current search terms' were clicked in the Advanced Search, a server error page would appear	The server error message does not appear
Clicking the font size buttons would lead to a server error page	The server error message does not appear
On the user Login page, clicking 'Enter' did not log the user in	Focus is now on the 'Log In' button, so hitting Enter logs in
Searched-for terms were not highlighted in the record view	A change in how Calm passes data to CalmView has made this possible again