CALM ALM
Version 9

Guide for Existing Users

Any comments or requests for change to this user guide should be referred to:-

Axiell.
Hall View Drive
Bilborough
Nottingham, NG8 4GD

Tel (0115) 9008000
Fax (0115) 9425718

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Introduction

This introductory guide is for existing *Calm for Archives, Libraries and Museums* users. It is intended primarily for use after you have installed CALM version 9, although you will find it useful to read through the guide before installation.

The guide:

- includes an overview of the new features in version 9
- highlights changes from version 8

Please Note: All new CALM features are also documented in the online CALM manual. To find out more about using the new functionality please follow the URLs provided in this guide.

In addition, the main URL for the CALM Online Manual is:

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

Username: ALM
Password: Tree (case sensitive)

What's New in Version 9

The main application changes in version 9 of CALM are:

- Cosmetic refresh
- Tree generation
- Image management

There are also a number of internal database changes designed to improve general application performance. Some of these are relatively minor and not visible to the end user so have not been included here.

Cosmetic refresh
(http://www.dswebhosting.info/alm/main_menu/basics/the_calm_window.htm)

We have introduced the concept of themes into version 9. There are three themes available in CALM ALM, Records Management and Library:
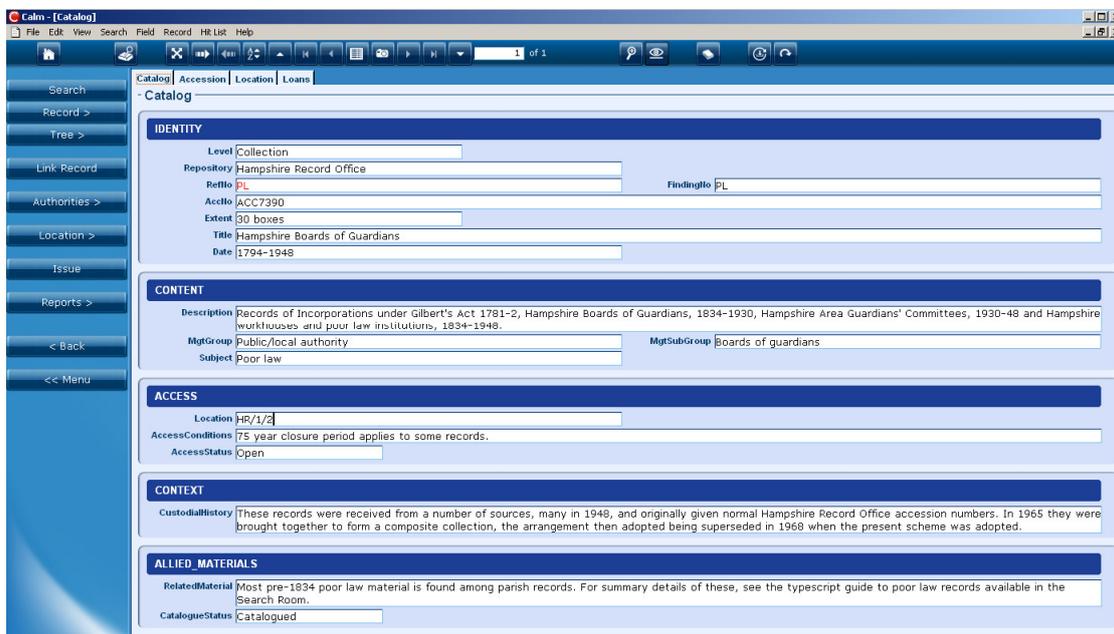
- Calm
- Teal
- Calm Classic

By default CALM will now install with the new Calm theme. Themes are client settings so may be changed by individual users. The Calm and Teal themes require that the monitor is set to a minimum 1024x768 resolution. The Calm Classic theme (used in all versions up to and including version 8) can run under 800x600 resolution. Please note that the addition of the new themes has not changed any of the regular functionality in CALM.

The new default CALM menu for ALM is:

Main menu displayed in the Calm theme

A typical catalogue record looks like:

Catalogue Record displayed in the Calm theme

The online manual has been updated with instructions on selecting different themes using the View options:
http://www.dswebhosting.info/alm/main_menu/basics/view_options.htm

Some tool bar buttons in CALM have been updated with new icons; however the buttons have not changed position on the screen. The Tool Bar Buttons page in the Calm manual lists all tool bar buttons and their functionality: http://www.dswebhosting.info/alm/main_menu/basics/tool_buttons.htm

Tree generation
(http://www.dswebhosting.info/alm/main_menu/basics/tree_fields.htm)

We have changed the way in which the tree is generated behind the scenes in order to significantly improve the speed at which the tree is retrieved and displayed on screen. The change in the way in which tree fields are indexed means that they are now searched in a different way. For example, in version 8, if you searched for RefNo=PL you would find every record with PL in the RefNo field. In version 9 if you search for RefNo=PL you will only find the record which exactly matches RefNo= PL. If you want to retrieve all records you would now need to search for RefNo=PL*.

More information on working with tree fields can be found in the online manual; the manual now contains a detailed page about searching tree fields: http://www.dswebhosting.info/alm/main_menu/basics/searching_tree_fields.htm

Image and Multimedia management
(http://www.dswebhosting.info/alm/main_menu/basics/image_handling.htm)

In order to more effectively handle images some changes have been made to how they are manipulated by the CALM client.

The Images folder on the server is now treated as an image repository in much the same way as generic image management products such as IBase. All access to images is now controlled by the CALM (DScribe) server.

The user no longer needs to know how the files are stored on the server and the CALM client does not now need access to a share on the server.

New Multimedia Field type
(http://www.dswebhosting.info/alm/main_menu/basics/multimedia_fields.htm)

A new field type of "Multimedia" has been introduced.

The multimedia repository is shared by all databases within the application.

We have expanded the detection of multimedia file types in the new multimedia field to recognise the following file formats:

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, MS Excel, MS Word

Thumbnails specific to these formats will be generated when they are linked to the multimedia field. On older operating systems, a generic icon will be used to denote whether the item is sound, video, document or image.

Currently, metadata extraction for TIFF, JPEG and PNG is supported (note that BMP and GIF files do not contain metadata).

When opened, TIFF, JPEG, BMP, PNG and GIF files will be displayed in ImageViewer. All other file formats will be opened in whatever software is associated with the file type on the client PC.

Practically, we are limited with the file size of an individual multimedia item according to what can fit into memory at once. Therefore, storing extremely large files (of many tens of megabytes) will not be possible without substantial RFE changes to the client/server architecture.
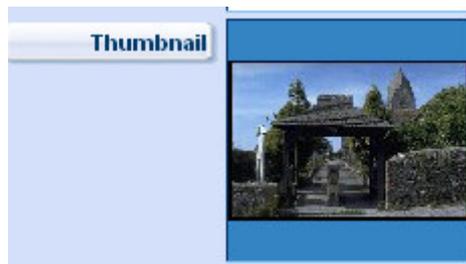
Automatic server-generated thumbnails

Master images can be quite large. Therefore, it doesn't make sense to download the image at full resolution in order to display records in CALM. Doing so will slow down data entry considerably. The v8 solution to this was to add the "Popup" attribute for the Image and Document fields. This causes a generic icon to be displayed in CALM as below:

The generic icon is fast, but does not allow the user to get an indication of what the linked image or file represents. The record may contain multiple icons and the user has to click on each one to see what they represent.

Without the "Popup" attribute, the full resolution image is fetched from the server and downsized on the client, as in the Thumbnail field in the catalogue database, below:

However, this is inefficient if the image is anything other than a thumbnail so this behaviour has been subtly changed.

The "Popup" attribute has been maintained for compatibility on fields such as Document and Image; in these cases the fields behave as before.

When the "Popup" attribute has not been specified, thumbnails are retrieved from the server. These thumbnails are automatically generated on the CALM server (where they are cached and stored in a .thumbnails folder to allow future requests to be faster). New thumbnails will be automatically generated on the server if the master image has changed. The thumbnails are stored at a server-defined resolution as .JPG files.

Therefore, for the future, we could remove popup attributes from image fields with a smaller impact on performance. Fields would have the same look and feel as if the "popup" attribute wasn't specified.

Focus indication in fields

In Version 8, when using the keyboard, focus indication will disappear when entering an image field. There is no indication to the user where the focus is.
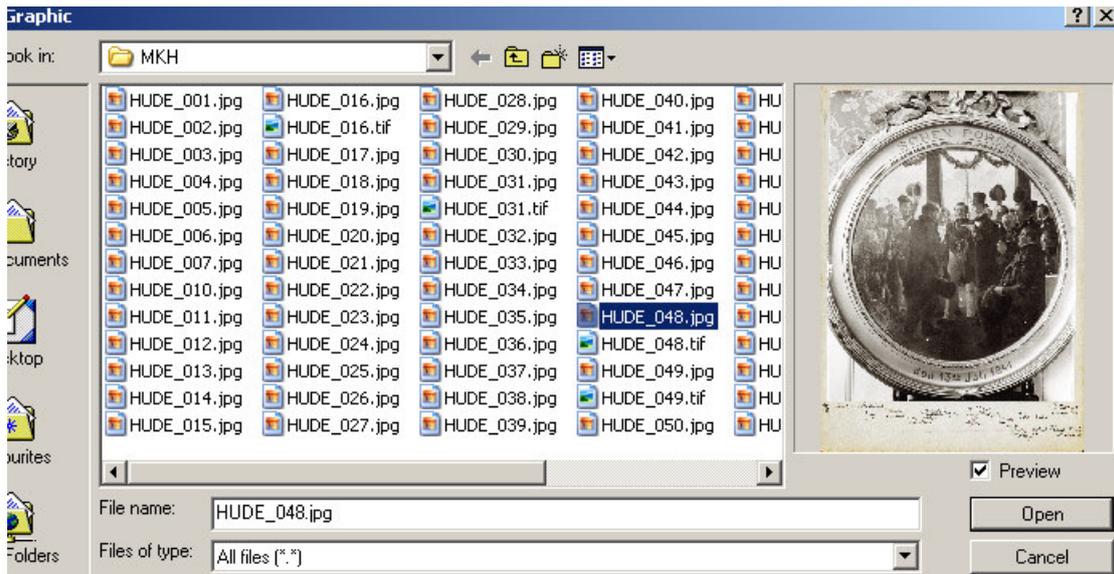
In version 9 focus is now indicated by a coloured border around the image:

Please note this also now applies to document fields.

Attaching to existing images on the server

Users may still have some images already on the server which they may wish to link to records. Currently, we have implemented a dialogue box that retrieves a list of images from the server as below:

This serves the same function as the old "Browse" functionality on the button next to the field.

The list is a flat list of all filenames on the server (including folders). A thumbnail is displayed for the currently selected item.

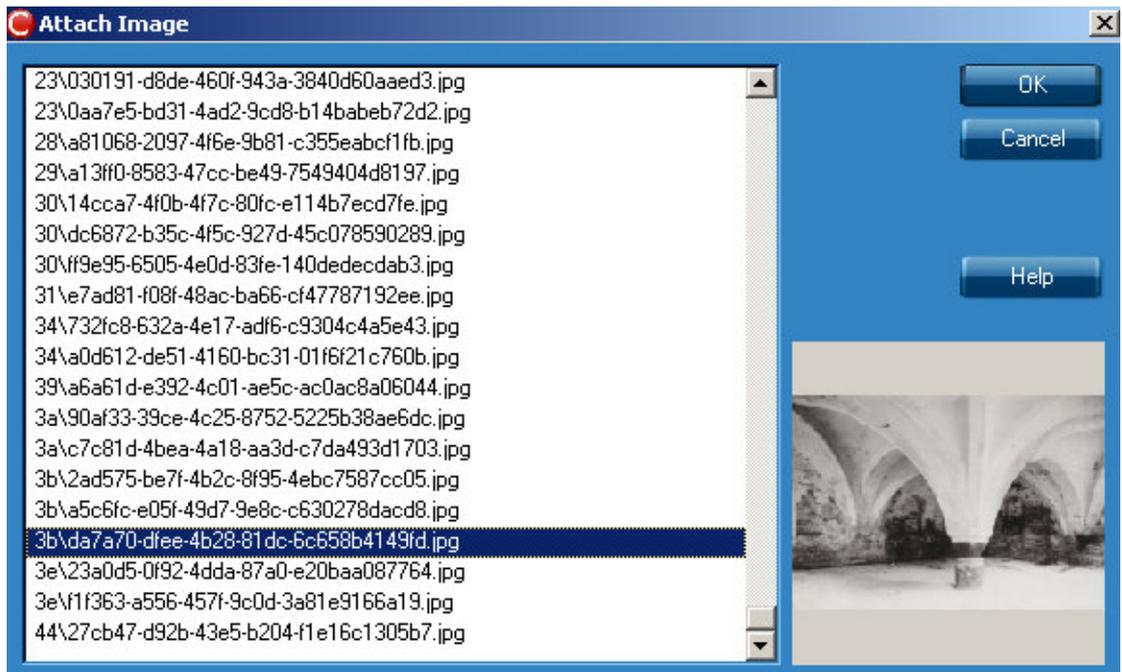When the user clicks OK, the image ID is stored in the field.

The CALM manual now contains sections on linking to existing files for both multimedia and graphic fields:

http://www.dswebhosting.info/alm/main_menu/basics/multimedia_fields.htm#linking_to_multimedia_already_in_calm

http://www.dswebhosting.info/alm/main_menu/basics/graphic_fields.htm#linking_to_image_already_in_calm

Browsing for local files

The user will typically have a local file that they want to import into the database. In version 9 the user will be able to select the file using a standard Windows dialogue box as below:

If the field already points to an image then the contents of the image on the server will be replaced by the new file. If the field is empty then the server will automatically generate an image ID and the image will be stored on the server using the auto-generated ID.

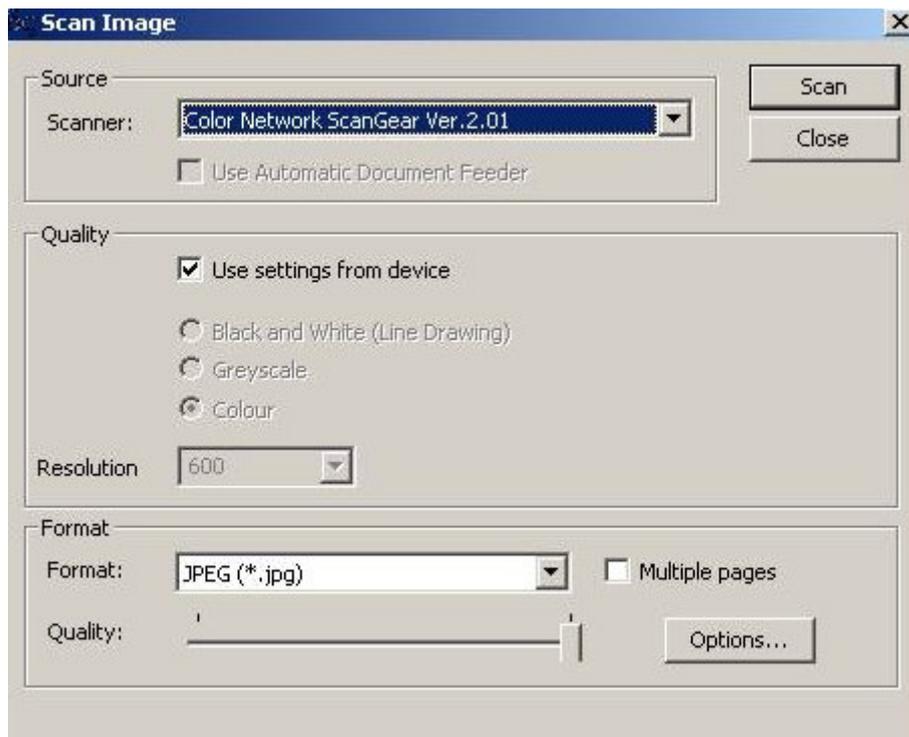The CALM manual now contains a section on importing local files for both multimedia and graphic fields:

http://www.dswebhosting.info/alm/main_menu/basics/multimedia_fields.htm#import_option

http://www.dswebhosting.info/alm/main_menu/basics/graphic_fields.htm#import_option

Scanning

In version 8 users can scan using ImageViewer, however the process currently requires a lot of clicking. There is no visible interaction between ImageViewer and CALM.

In version 9 users may scan into image fields directly from CALM without using ImageViewer:

Metadata such as the resolution and make of scanner will be stored in the image.

If the field already points to an image then the contents of the image on the server will be replaced by the new image. If the field is empty then the server will automatically generate an image ID and the image will be stored on the server using the auto-generated ID.
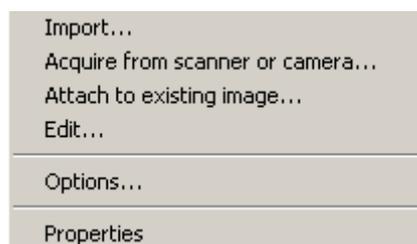
The CALM manual now contains a section on scanning images into both multimedia and graphic fields:

http://www.dswebhosting.info/alm/main_menu/basics/multimedia_fields.htm#scanner_option

http://www.dswebhosting.info/alm/main_menu/basics/graphic_fields.htm#scanner_option

New right click menu for Graphic fields

A new right click menu has been added to the graphic fields:

The options on the right-click menu are used to launch the various functions specified above. The CALM online manual now contains a section on the right-click menu and its use with both multimedia and graphic fields:

http://www.dswebhosting.info/alm/main_menu/basics/multimedia_fields.htm

http://www.dswebhosting.info/alm/main_menu/basics/graphic_fields.htm

Metadata Information

Technical metadata associated with the image will display through the Properties option in the right-click menu specified above.

Metadata retrieval

New functionality has been added to enable CALM to access and utilise any metadata associated with the images.

ImageViewer

ImageViewer is used to view the high-resolution copy of the image. It has always had basic image editing capabilities however ImageViewer will be enhanced in v9.1 to preserve metadata when editing an image. At present, any metadata will be lost when the image is edited.
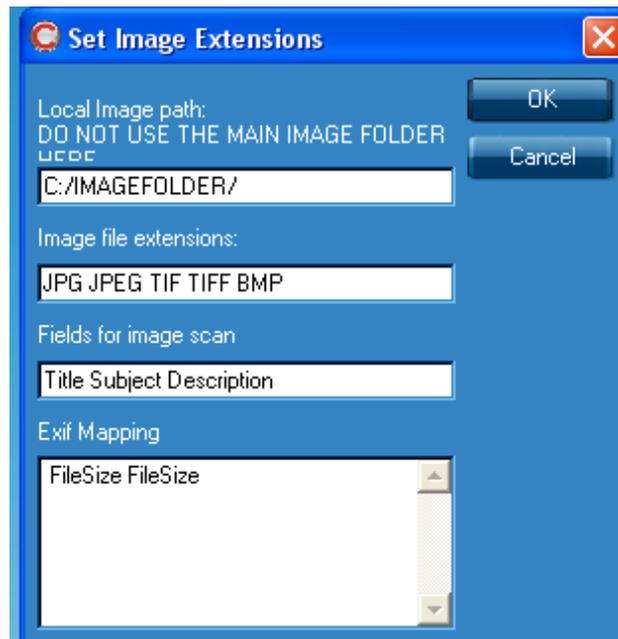
Images Database

http://www.dswebhosting.info/alm/add_on_modules/images_database.htm

Please note: the Images database is an optional add-on package for CALM; the following is applicable only to those customers who use the Images module.

New Images Database parameters

Two new parameters have been added to the Images database parameters dialogue box: Image File Extensions and Exif Mapping, as below:

The Image database parameters

Image file extensions is used to indicate the extensions of files to be picked up when using the "Scan Folder" option in the Images database.

Exif Mapping enables you to map the Exif fields in the metadata embedded in your images to specified fields in your CALM Image records.

Enhanced Scan Folder functionality

The Scan folder option in the Images database continues to scan your specified local folder for new images and add them to the images database, creating a new record for each image. In addition, the Scan folder option now extracts metadata contained in your images and places it into Exif fields in your Image records. You may also use the Exif mapping parameter described above to map the metadata to specified fields in your records.

Metadata button

A new Metadata button has been added to the side button strip in the Images database. Clicking this button will extract metadata from an existing image in your record and place it into new Exif fields on your Image record.

Please Note: there is now a section in the online manual for add-on modules including the Images database. This section contains detailed guidance on all the above features as well as general information about using the Images database.