

Guide for Existing Users

Calm Version 9.1



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ABOUT THIS PUBLICATION

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1. DOCUMENT INFORMATION

1.1 Document Revision Log

Created July 2011.

1.2 Document Ownership & Audience

Prepared July 2011 by Malcolm Howitt and Mel Peart.

Audience – All users of Calm software applications.

2. INTRODUCTION

This introductory guide is for existing *Calm for Archives, Local Studies and Museums* and *Calm for Records* users. It is intended primarily for use after you have installed Calm version 9.1, although you will find it useful to read through the guide before installation.

The guide:

- includes an overview of the new features in version 9.0 and 9.1
- highlights changes from version 8

Please Note: All new Calm ALM 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)

All new Calm for Records features are documented in the Calm for Records manual which is available as a PDF. This is supplied on the installation CD and also from the Helpdesk.

3. IMPORTANT NOTICE FOR ARCHIVE AND LOCAL STUDIES CUSTOMERS

Calm ALM now supports relationships in Name Authority Records. This feature works with record types classified as Archive or Library. When a name authority record is linked to a catalogue record, three fields – RelatedNameCode, RelatedNameRelationship and RelatedNameDescription – are now added to the catalogue. The RelatedNameCode is a replacement for the PersonCode.

In order to move links in existing catalogue records from PersonCode to RelatedNameCode, we have supplied an update routine. Go to the Administration Menu, Update Routines, Mandatory and click on PersonCode2RelatedName.

Please note: it is best to ensure that no one else is using the Calm catalogue when this routine is run. This is because the routine can only work on records available for editing and records automatically become read only when someone is viewing them.

Catalogue record types which are classified as Museum are not affected by this change: the link to Associated Names continues to be AssociatedPerson, and no extra fields are created.

Reminder: customers using CalmView and DServe who want linked name authority records to be viewable online, will need to add the RelatedNameCode, RelatedNameDescription and RelatedNameDescription fields to the list of visible fields, or modify the existing fields. The Helpdesk can provide further assistance.

4. CHANGES TO ALL CALM APPLICATIONS

4.1 General notice

A significant number of customers are still running Calm version 7.x or 8.x and are therefore not familiar with the cosmetic change that was applied to Calm in release version 9.0. Therefore we have also included in this user guide the main changes added in version 9.0. A link to the online manual is also included, where relevant.

These features are generic to all Calm applications (ALM, Records Management, Library).

4.2 Cosmetic refresh

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

Available in v9.0.

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.

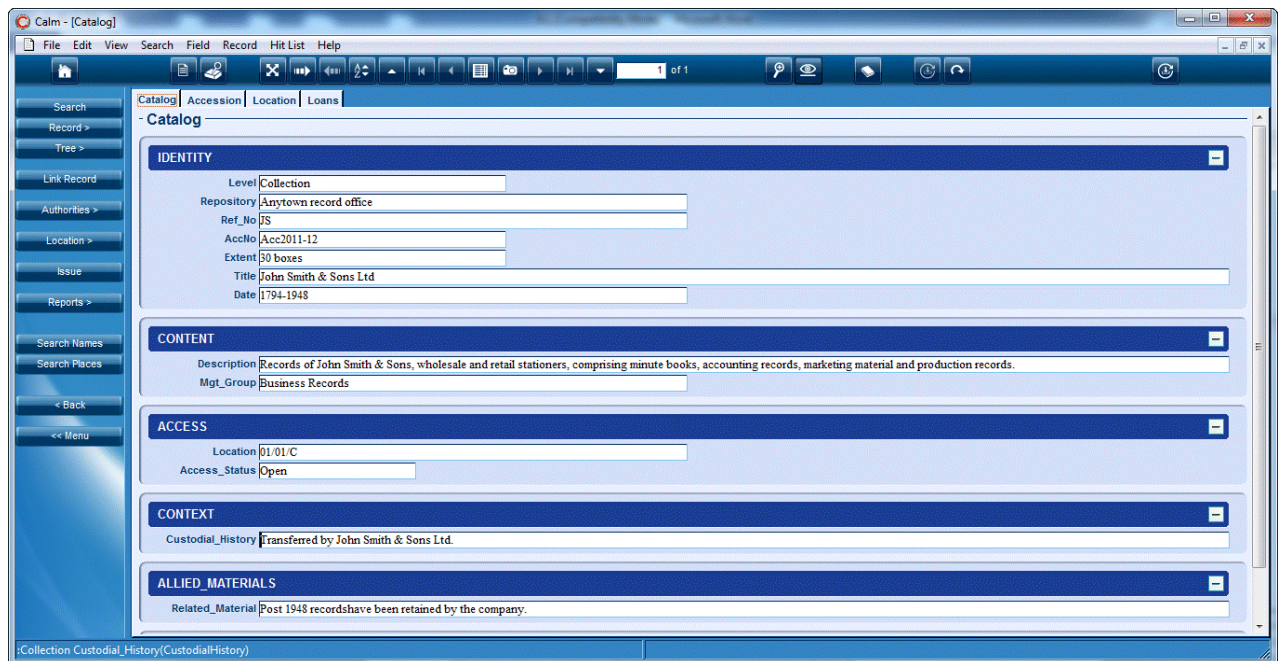
The new default Calm menu for ALM is:





Calm ALM main menu displayed in the Calm theme

A typical CALM ALM catalogue record looks like:



Calm ALM 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

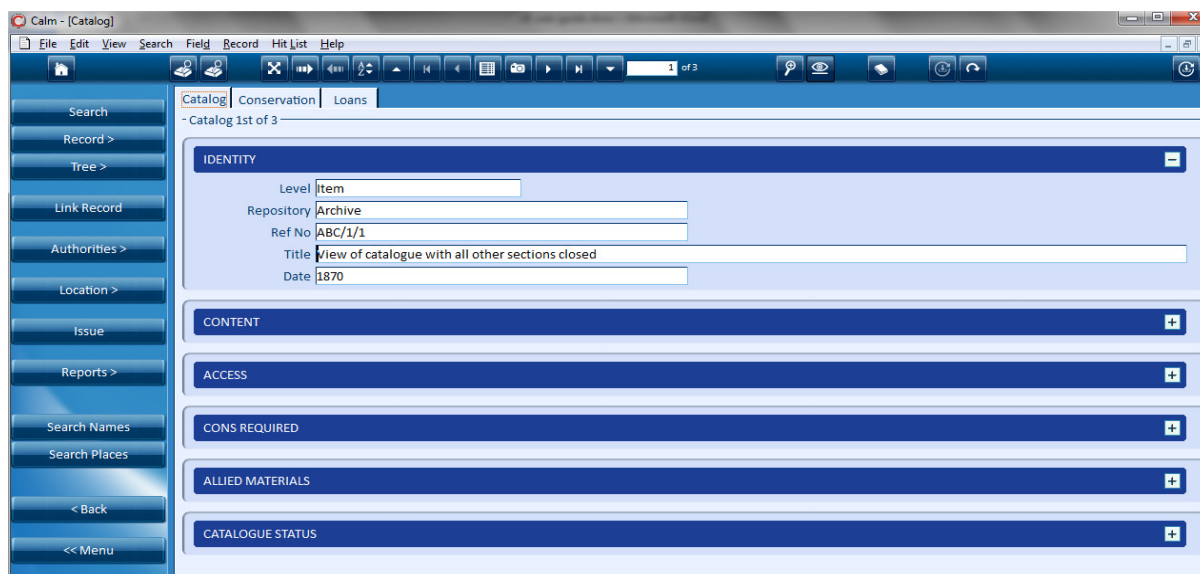


Some tool bar buttons in Calm have been updated with new icons; however the buttons have not changed position on the screen. The Tool Bar Buttons page in the Calm manual lists all tool bar buttons and their functionality:

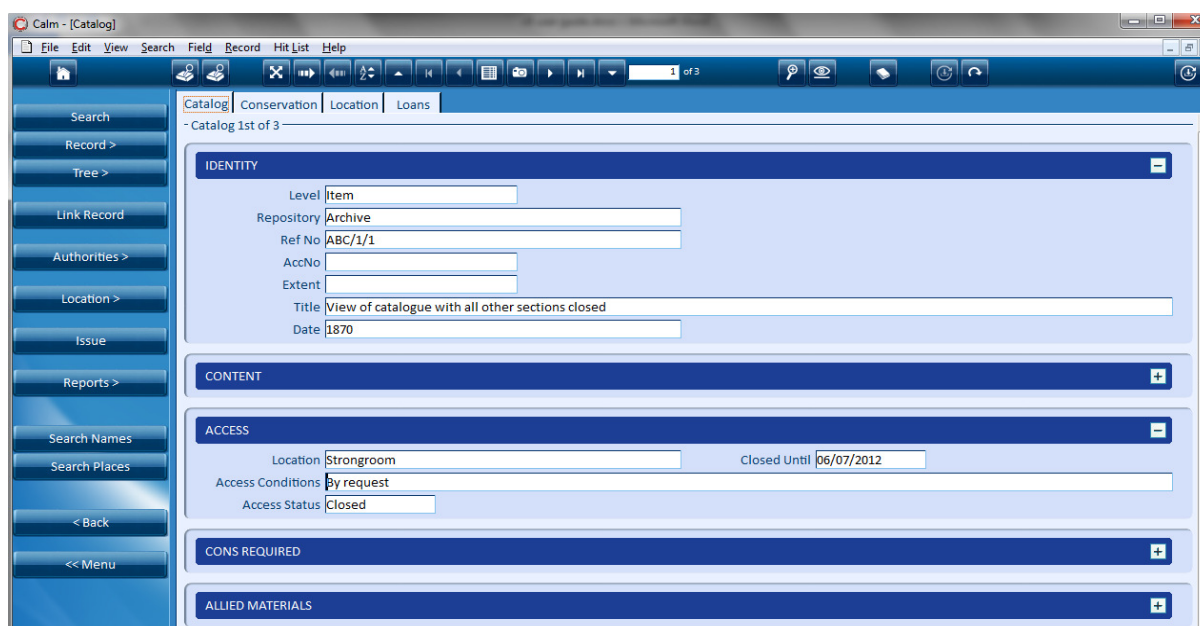
http://www.dswebhosting.info/alm/main_menu/basics/tool_buttons.htm

4.3 Field Groups

You can now choose to hide/show fields within a group, allowing you to condense the amount of detail appearing on screen. This is particularly useful for very long records. The group visibility state is changed using the  and  buttons on the right hand side of the blue Group Content bars.



Calm ALM catalogue record with Identity Group open



Calm ALM catalogue record with Identity and Access Groups open



4.4 Uninstaller

An Uninstaller for Calm is now available. The shortcut is in the Axiell folder on the Start Menu with the other Calm short cuts. There is also an uninstall option available in Windows Program Manager.

The Uninstaller:

- Removes the Dscribe folder and subfolders
- Removes the DS Key from the Registry*
- Removes the short cuts from the start menu.

There is also the option to keep data and settings, or remove them completely. Further details are available with the general installation instructions.

* Unless CalmView is installed.

4.5 Automated Reindex

In the event of a problem with an automated re-index, a "re-index" fail message is added to the event log.

4.6 Hitlist Sort - Text as Numbers

This is now set as the default. In practice this means Calm will sort fields like RefNo, which may typically contain a mix of alpha-numeric characters, in the numeric order 1,2,3,4 etc instead of 1,11,2, 23, 3, 31, 4, etc.

4.7 Overview to open by default

The last known overview state is saved when Calm is closed. If the overview in a database is visible when you close Calm it will be open when you start Calm again. The last known state can only be saved when exiting Calm from the main menu Exit button. If you close Calm using the Windows style X at the top right hand of the screen then Calm closes without saving the last known state of this parameter.

Please note: for customers who share a single client (ie if Calm is being run over Citrix, or if Calm is hosted by Axiell), the settings of the *last person to exit Calm using the Exit button on the main menu* will be saved.

4.8 Glossary entries and synonyms - network setting

Any terms defined in the glossary or as a synonym are now available globally for use by all clients within a networked version of Calm, rather than being a client specific setting. The processes for defining these terms have not changed and are documented in the user manual. However only users set as Administrators using the Admin security settings, are able to access this functionality and add new terms. Latest glossary and synonym terms are loaded when a Calm client starts, so any terms added through a client will not be available to that client until it is restarted.



4.9 Tree generation

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

Available in version 9.0.

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

4.10 Picklist fields on records

If you set a picklist to appear with a drop-down arrow against it (set in Field, Picklist in Admin) then a blank choice appears at the top of the list when you click the arrow on the record. Previously if you clicked on the arrow (perhaps inadvertently) you had to select a term from the list.

4.11 Search dialogue box – blank option in picklist field search

Any field defined in Calm as a picklist and which appears in a search dialogue box now contains a blank option at the top of the list. Previously in Calm if you clicked in the field in the search dialogue box you had to select a term or cancel the search.

4.12 Resizing search box

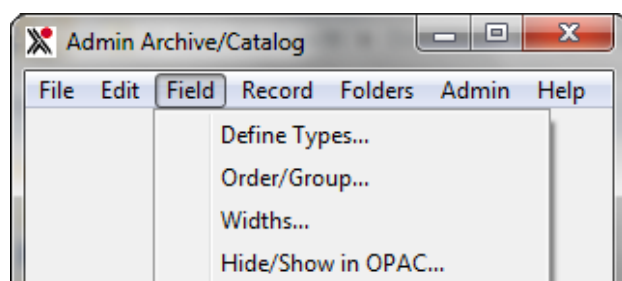
We have resized the Windows style dialogue boxes to fit more comfortably into the application. However it has not been possible to implement the “drag” resizing option available in some other Windows based applications.



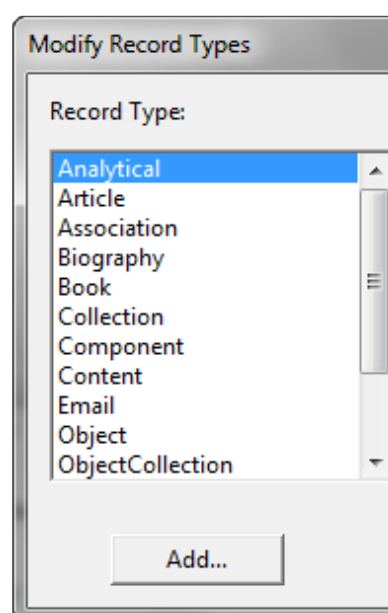
5. CHANGES TO ADMIN FUNCTIONALITY

5.1 User defined fields and record templates

You can now create your own fields and your own record templates, and define how you want them to appear. However, we advise you use this with care as there are parts of Calm that use some existing fields for specific purposes e.g. EAD export, OAI, data extraction, etc. In order to ensure no internal system clashes, user-created fields and records are prefixed with "user" e.g. record type = UserPainting, field=UserLocalCode. Any user defined record template and user defined field will appear with the "User" prefix in Admin, but without the prefix in Calm. However you will be able to see the true label of a record template and field in the status bar at the bottom left hand corner of the Calm record screen.



Creating a new field within Admin



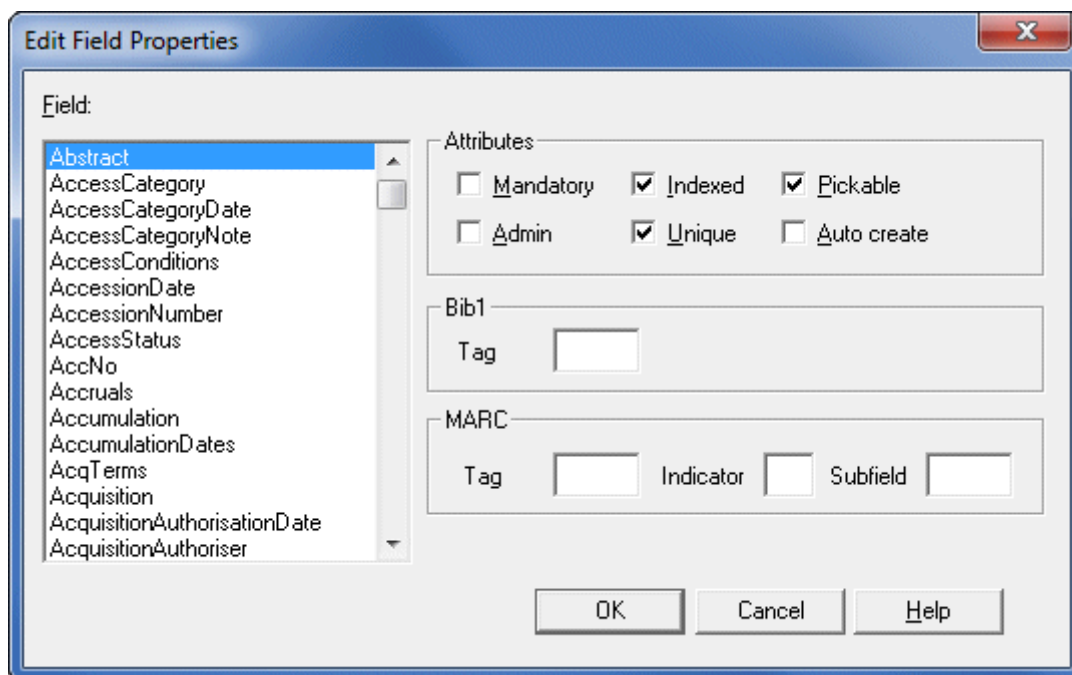
Creating a new record type using Admin

5.2 Validation of unique data in fields

You can now define which fields you want to have unique content within a database, by selecting Field, Properties within Admin and checking the Unique attribute. If record validation is set then a warning message will appear on saving the record if the content of the relevant field is not unique.

5.3 Pickable fields

A field will only appear in Calm for use in record templates, overview and searching if it is marked as "Pickable" in Admin, Field Properties. By default, all fields are set as "Pickable".



Field Properties screen showing unique and pickable options

5.4 Autocreate

Where a field has a serial number associated with it (see Field, Serial Number in Admin), it can be set as Auto create. This means that every time a new record is created, the next serial number appears in the field.

6. SPECIFIC CHANGES TO CALM FOR RECORDS

6.1 Find and Replace

This has caused some confusion as to whether the feature is still available. It is under Edit rather than Hitlist in the Windows dropdown menus and is called Replace rather than Find/Replace.

6.2 Search dialogue box – UserId and ClassId

Both these fields now appear as authority pop-up fields. If you start to type a search term in one of these fields, Calm will display any terms that match the characters entered.

7. SPECIFIC CHANGES TO CALM ALM

7.1 Image and Multimedia management

(http://www.dswebhosting.info/alm/main_menu/basics/image_handling.htm)

Available in 9.0.

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 used by the new multimedia field (x:\dscribe\archive\images) is now treated as an image repository. 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.

7.1.1 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).

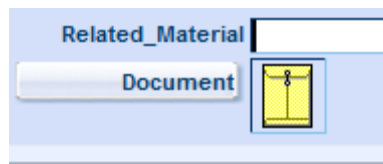


When opened, TIFF, JPEG, BMP, PNG and GIF files will be displayed in ImageViewer. All other file formats will be opened in whatever software is associated with the file type on the client PC.

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.

7.1.2 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.

7.1.3 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.

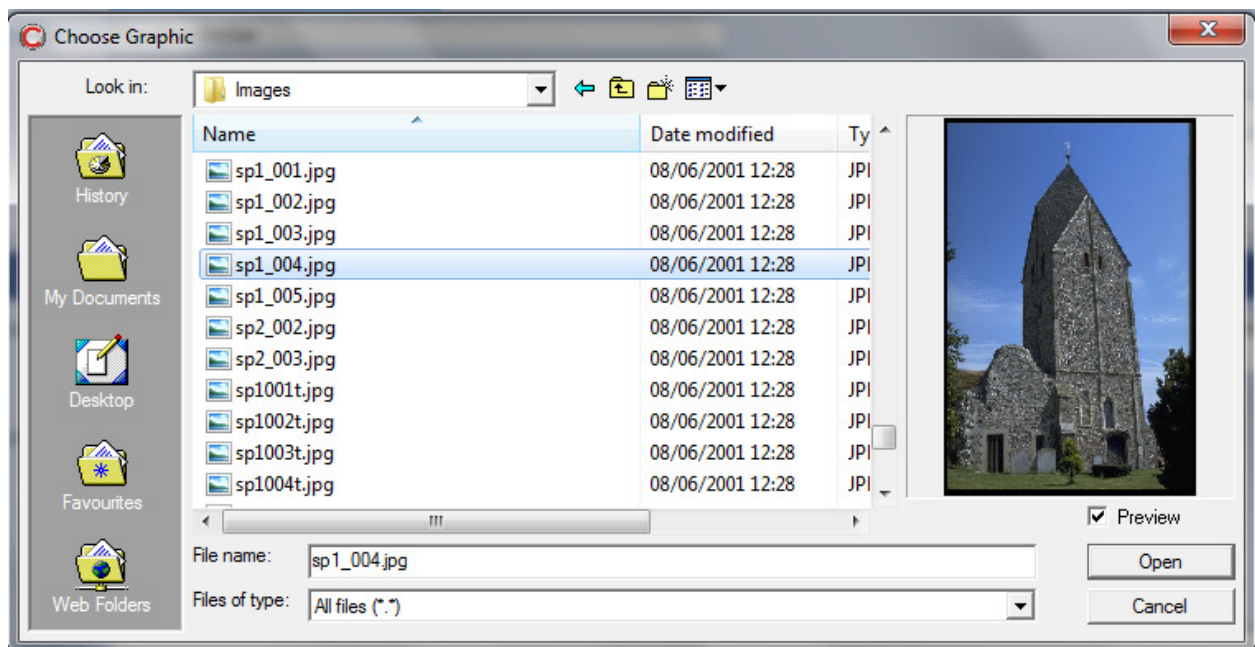
In version 9, focus is now indicated by a coloured border around the image:



Please note this also now applies to document fields.

7.1.4 Browsing and importing 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:

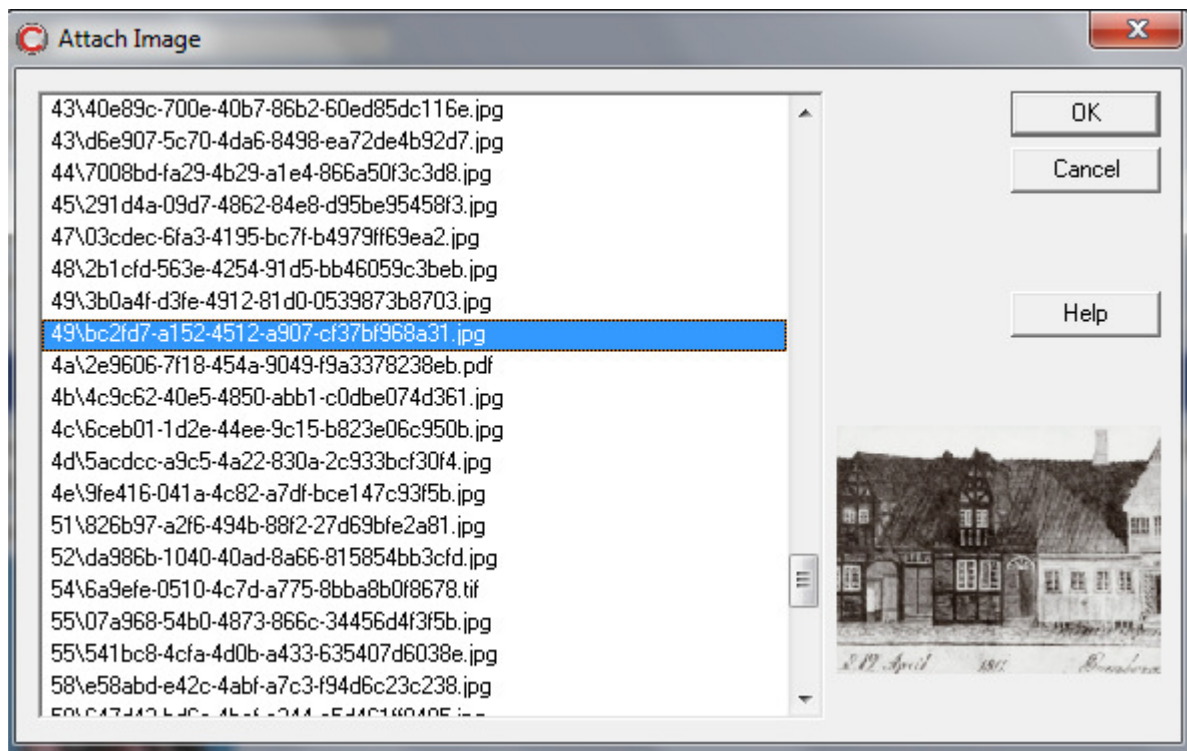


http://www.dswebhosting.info/alm/main_menu/basics/multimedia_fields.htm#import_option

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

7.1.5 Attaching to existing images on the server

Users may have multimedia files 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:



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:

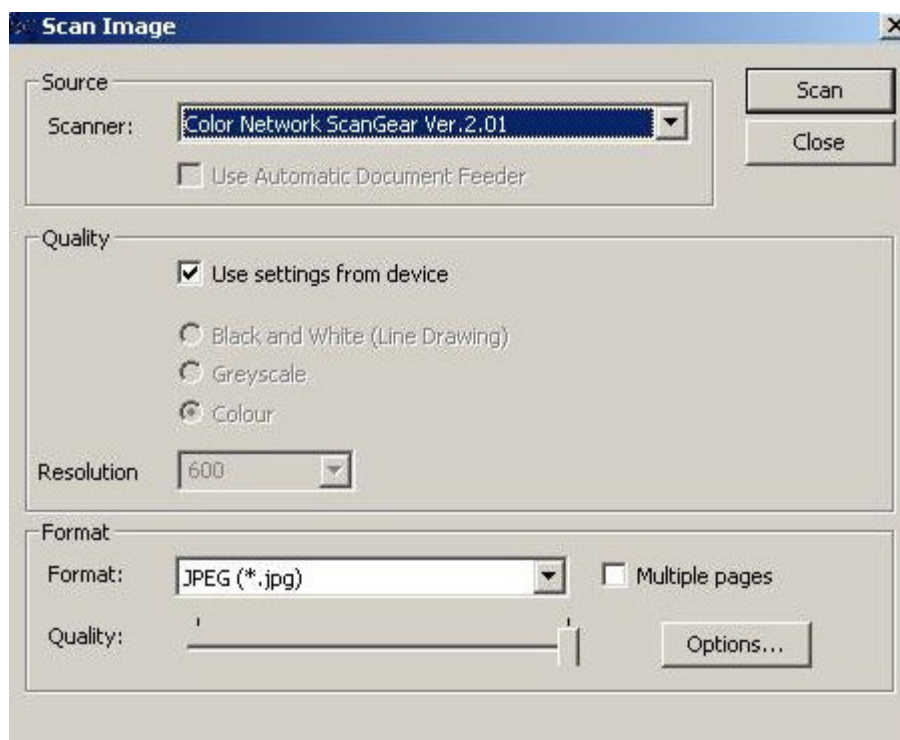
http://www.dswebhosting.info/alm/main_menu/basics/multimedia_fields.htm#linking_to_multimedia_already_in_calm

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

7.1.6 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:

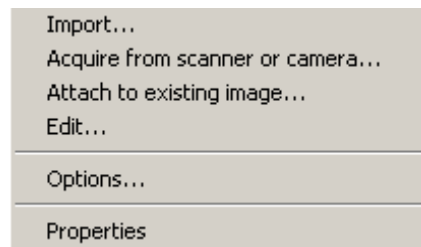
http://www.dswebhosting.info/alm/main_menu/basics/multimedia_fields.htm#scanner_option

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

7.1.7 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

7.1.8 Metadata Information

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

7.1.9 Metadata retrieval

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

7.1.10 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.

7.2 Images Database

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

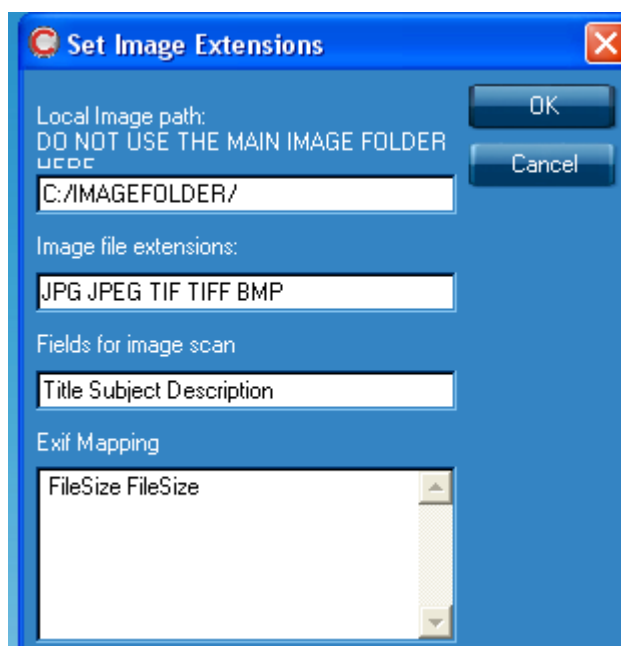
Available in v9.0.

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.

7.2.1 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.

7.2.2 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.

7.2.3 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.

7.3 Searching

7.3.1 Searching two or more databases



It is now possible to do an "Any Text" search across more than one database. The list of databases is set from the Main Menu using Administration, Parameters, Cross database

search. The  button on the tool bar allows you to search for a term(s) and displays the number of hits from each listed database. You can then choose which database to look at. Please note at the moment you cannot go back to list after selecting one database to view, you have to search again. You can currently use any word or string of words to search on, but not wildcard characters e.g. phil*.

7.3.2 Searching Names and Places from within the catalogue

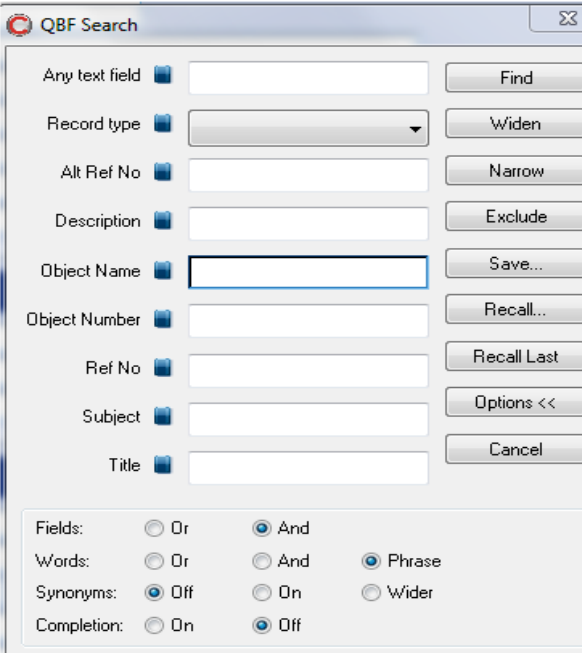
Two new buttons have been added to the left hand button bar: Search Names and Search Places. These allow users to access the search dialogue boxes for, and therefore search, these two databases directly from the catalogue database.

7.3.3 Searching Catalogue from the Conservation database

A new button has been added to the left hand button bar: Search Catalogue. This allows users to access a search dialogue box for, and therefore search, the catalogue database directly from the conservation database.

Please note: this is the ConsCat search dialogue box, not the Catalogue search dialogue box. It opens the Catalogue database in the "ConsCat" view, which provides buttons to facilitate the Conservation process rather than the Catalogue process. The default setting contains the ConservationPriority field only. To add other fields to this search dialogue box, go to Administration, Search Dialog and select ConsCat.

7.3.4 Search options



QBF Search

Any text field Find

Record type Widen

Alt Ref No Narrow

Description Exclude

Object Name Save...

Object Number Recall...

Ref No Recall Last

Subject Options <<

Title Cancel

Fields: Or And

Words: Or And Phrase

Synonyms: Off On Wider

Completion: On Off

The advanced search options that are displayed when you click the Options button on a standard search dialogue box now retain the last known state, so they will remain open if Calm is closed then opened again. Note this feature only works if you are running Windows 7 or 2008. Older versions of Windows do not allow the saved state feature on search dialogue boxes. Note that the last known state can only be saved when exiting Calm from the main menu Exit button. If you close Calm using the Windows style X at the top right hand of the screen then Calm closes without saving last known state of this parameter.

7.4 Attaching media files to the Enquiries (and all other) database

The new multimedia field has been added to the field list for this database and now to all others within Calm ALM. Previously in version 9.0 the multimedia field was available in the catalogue database only.

7.5 EAD and EAC

7.5.1 EAD export to Hub

The EAD report option "Archives Hub EAD 2002" has been revised in line with discussion and agreement with Calm users and the Archives Hub. The process for running this report has not changed and is documented in the user manual.

7.5.2 EAC export

Support has been added for reporting name authorities using the EAC report option available from File, Report within the Name Authority file. Note, you should choose the EAC report template rather than RA-EAC.

7.5.3 EAD/XML tags imported into catalogue records

The original EAD import option used to import the EAD tags into the record as well (as hidden tags in readonly fields, and visible using the F9 toggle option). There was an option to strip out the tags later. In v9.1, the tags are no longer imported at all, as the benefits in importing them were far outweighed by the side effects they were causing for customers.

7.6 Name Authority Records and Indexing

7.6.1 Support for relationships in Name Authorities

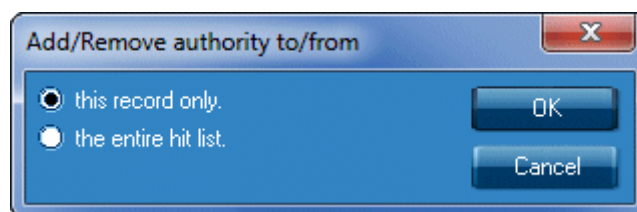
If you link an authority name to a catalogue record, a new field group called Related Name is added to the catalogue record. This group contains three new fields- RelatedNameCode, RelatedNameRelationship and RelatedNameDescription. The RelatedNameCode field contains the content of the Code field from the name authority record. The other two fields allow you to record detail of the specific relationship of that authority record to the catalogue record.



Previously, the link would have been made using PersonCode in the catalogue record. In order to move links in existing catalogue records from PersonCode to RelatedNameCode, we have supplied an update routine. Go to the Administration Menu, Update Routines, Mandatory and click on PersonCode2RelatedName.

7.6.2 Add/Remove authority – hitlist

It is now possible to add or remove an authority term from a hitlist of catalogue records. It is not possible to have separate screen prompts and dialogue boxes for add and remove, but we have re-designed and re-worded the single dialogue box to more accurately reflect the process.



7.6.3 Exporting name authority records

It is now possible to export and report on name authority records by hitlist rather than the whole database. This option is available from the Reports option from the button strip on the left of the screen. The data in the hitlist is exported to file called NamesExportAlpha.txt in the local dscribe\archive\output folder and then runs a Word mailmerge template called NamesExportAlpha.dot. For more information on the mailmerge process, please check the Help options within Word.

7.6.4 Subject Thesaurus button in the catalogue database

The button has been changed to:



7.7 Create new depositor from within the accessions database

You can now add a new depositor or intermediary record from within the Archive accession database. Select the Depositor or Intermediaries button in the Accession database and then select New on the dialogue box..

7.8 MailMerge reports

There is now a Templates folder in the Dscribe/Archive folder on the client machine. It contains the default mailmerge templates which are supplied with Calm. We will overwrite these with new templates every time Calm is installed or upgraded. Therefore this folder will always contain the most up to date copy of the templates, and should not be edited.

At present, when you launch a report from Calm, the data and the mailmerge template are placed in the D:\Scribe\Archive\Output folder on the client machine. If you make changes to the template, they are made in this folder and are not overwritten during upgrades. If you want to use the new templates, overwrite the existing mailmerge templates in the output folder with the appropriate template from the Templates folder. Remember to keep a copy of the original mailmerge template from the output folder in case you wish to revert to this.

We have now supplied additional functionality: you now have the option to output report data to an individual's My Documents folder on the client machine. This means, if a number of people share the same PC, they can all maintain their own templates.

In order to set this up, in the Calm client go to Administration, Parameters and then Select Individual settings, and check the box. Please note, you must have access to the Windows My Documents folder in order to make use of this functionality.



8. OMITTED FROM V9.1

Items originally agreed with the user group but which have subsequently been omitted.

8.1 Recycle bin

This is currently on hold as our initial solution proved to be unworkable. We are continuing to investigate this.

