

CalmView v3.0

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Introduction

At the last user group meeting in 2015, it was felt that CalmView was most in need of a product update. We advised that while we were reluctant to make significant changes to core functionality without wider discussion, we would be able to make some “quick win” changes that were either non-contentious or could be implemented by parameter. A number of suggestions were made through Calm-LIS and direct conversation and were categorised as below. The latest release version now includes these features. Those that were rejected are also listed.

Installation and version

If this is a fresh installation of CalmView, then it can be installed as per standard installation instructions available from helpdesk. If you are upgrading an existing site then you must take note of the **new navigation bar** feature below.

This new version of CalmView will work with v9.3 of Calm. If you are already using v10.0.0 of Calm then you will have to install the new v10.0.1 update release before you can install CalmView v3.0.

At the last user group meeting in 2015, it was felt that CalmView was most in need of a product update. We advised that while we were reluctant to make significant changes to core functionality without wider discussion, we would be able to make some “quick win” changes that were either non-contentious or could be implemented by parameter. A number of suggestions were made through Calm-LIS and direct conversation and were categorised as below. The latest release version now includes these features. Those that were rejected are also listed.

Agreed new features

Mobile friendly changes

- Site now has some resizing capability and buttons don't require hover. This is not fully responsive (that will require significant change) but has been improved.

- Navigation trees - can now contain user-specified fields in the hierarchy view.
- General tree fixing, including better handling of blank or empty nodes in trees.
- Further enhancements to any potential threats from XSS.
- For Museum only collections, the ObjectNumber field can act as a primary key or “tree” field. At the moment it is still not possible to have two different primary key fields i.e. RefNo and ObjectNumber in the same CalmView configuration.

Images/Multimedia

- Images can now be set to display on the overview page.
- Image/Multimedia links can now be toggled to open in a new tab/window on click, via the configurator.

Configuring field contents

- HTML content in fields can now be set to render on the record page.
- URL fields can now be configured to display a user-specified hyperlink text.
- Any field can be defined as a “hyperlink” field and the contents of the field will be presented as a clickable link, showing user-specified hyperlink text. Note for the most part this one isn't advisable – there is no guarantee that the field contents are a valid link.

Searching

- ‘Within’ search added to expanded search options, to search within a collection (the equivalent to adding ‘/*’ to the end of your search, or checking “is in” in the QbF field search option in Calm v10)
- A ‘REFINE SEARCH’ button added to the Overview page, to hopefully make the existing method of refining searches clearer.
- Alternate Search Buttons – Buttons for Narrow, Widen and Exclude Search have been added, along with an additional look into alternate search navigation approaches. These are toggle on/off in the configurator, so you can try them out if you wish.

Overview

- We have changed the default text in the overview. When the image field was in the overview and there was no image linked to the record, CalmView displayed “View Full Record”. Now the text displayed is “No Image Available”. We cannot parameterise this at the moment.

Icons for media files

- Replaced the default CD icon with ones that are more reflective of the type of file being displayed. Limited scope for further change at present, requires further in-depth review.

URLs

- A (long) URL added to the URL field in a Calm record will display in CalmView as a piece of text rather than the link itself, e.g. 'Click here to view record on map'.

New navigation bar

The horizontal "top" navigation bar in CalmView can now be customised to add or remove buttons. To customize this bar in the latest version of CalmView, you deal with two files:

TopNav.sitemap

This file dictates the number, content and actions of the buttons on the top navigation bar. It is not currently included in an installation by default, because it only needs to be present when you want an alternate set of buttons to the default. It is placed in the CalmView base folder, and when the site is run CalmView will automatically attempt to read it and construct a horizontal navigation bar from the contents. If it can't find or read the file, CalmView assumes the default layout and creates the standard Home, Advanced Search, ImageGallery and Showcase buttons.

A sample file looks like this:

```
<?xml version="1.0" encoding="utf-8"?>

<siteMap enableLocalization="true" xmlns="http://schemas.microsoft.com/AspNet/SiteMap-File-1.0">

    <siteMapNode url="default.aspx" title="$resources:MenuBarResource,Home"
description="$resources:MenuBarResource,Home"> </siteMapNode>

    <siteMapNode url="advanced.aspx"
title="$resources:AdvancedSearch.sitemap,sitemap_title"
description="$resources:AdvancedSearch.sitemap,sitemap_description" > </siteMapNode>

    <siteMapNode url="imagegallery.aspx"
title="$resources:MenuBarResource,ImageGallery"
description="$resources:MenuBarResource,ImageGallery"></siteMapNode>

    <siteMapNode url="www.google.com" title="Custom Google Button" description="Your
button description here"></siteMapNode>
```

</siteMap>

In this example, the first three buttons are Home, Advanced Search and Image Gallery, but the final button links to Google and bears the label 'Custom Google Button'. To add a button, add a new <siteMapNode>, and fill in the url, title and description attributes as required. Buttons can be reordered in this file.

You can also create dropdown buttons much like the old Advanced Search one, by nesting SiteMapNodes – See the 'AdvancedSearch.sitemap' file in any CalmView installation for an idea of how that is done. (Nesting nodes, standard xml format). For example, if you want a 'Home' button to contain a dropdown menu that links to other sites, that's now possible with minimal work during the branding stage.

Note that the number of buttons is no longer limited to four – You can have any number of buttons now. If not using a multiple of four, you need to amend the width of each one in the MenuBar.css file to make sure they arrange themselves neatly. Their default width is 25% of the available area, so multiple of four-button setups arrange themselves by default. They arrange themselves in multiple rows if they are too wide to fit.

MenuBar.css

This .css file dictates the appearance and width of the buttons created. In a default new installation this can be ignored. In an existing site the old branded .css file does not take into account the new way the buttons are structured, so it must be overwritten. This can be done by copying the MenuBar.css from the 'Default' theme directory to the 'Customer' one.

Note that if branding had been applied to the buttons in the old version (e.g. removing the button images and changing them to a blue colour instead), this will need to be recreated. Axiell can give further advice on this if required.

Changes which require more discussion or specification

Basket functionality

If the basket functionality requires expansion (or restriction) then we need to look at the feature as a whole. For example "restricting basket to orderable items" will prevent "ability to add hits to a personal wishlist created by the user to email/print". If we plan to modify/reuse/fix the My Items and Document Ordering systems in the near future, it may be wiser to roll this into one larger

more comprehensive effort to work on those different sub-systems. Perhaps we need two baskets (such as Amazon's wishlist/order basket), then we need to consider what we do if we start ordering printed copies / reproductions of items?

E-commerce

Linking CalmView to an e-commerce facility to make it easier for people to request and pay for e.g. digital content.

Changes which cannot be done with the current architecture

Default sort order to include non-overview fields

Sorting on data that isn't in the overview table isn't an option. Pulling extra data and 'hiding' it from the user, then using it to sort, is a potential avenue of investigation but would likely slow down the entire search process. It will also impact on any other changes we try to make to the Overview later. This has both technical and performance implications.

Pre-filtered searches

This is not possible due to the way CalmView searches. In DServe you could create a URL that replicated a specific search e.g. show all film collection records. However it is not possible to generate this sort of URL that can be used to repeat searches.

Further requests not yet considered

- Review of error messages, to make them more specific rather than generic.
- Export option in Calm to automatically generate the xml file formats required for Image Gallery, Showcase and What's New.
- Re-introduce dserve.log file (includes recording all searches carried out in a database)