



# **Axiell Collections for Calm** Quick Start Guide

# Axiell ALM Ltd.

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# Contents

Contents	3
Introduction to Axiell Collections	4
Start Collections	5
The Main Menu	5
Create a Record	7
Databases	8
Give a Record a Type	9
Record Types	10
Edit a Record	11
Fields	11
Save a Record	12
Edit Mode and Display Mode	12
See a Different View of a Record	13
Views	14
Search for a Record	16
The Search Dialogue Box	18
Link to a Record in Another Database	19

# Introduction to Axiell Collections

Axiell Collections is a web-based program for creating, editing, and searching records of items held at a museum, archive, or other heritage organisation. This means that you access it through an internet browser like Google Chrome or Mozilla Firefox. Collections should be used by staff and volunteers—it is not meant for the general public to search your records. For that, you need a different program.

This guide is intended to get you started with Collections and not exhaustively cover every function of the program. It will go through basic functions that you would want to do in Collections, like creating a record or saving a record, and talk about significant parts of the interface you encounter as you do this.

You will walk through creating a sample record and then searching for it in this Quick Start Guide. Any words you see that are underlined throughout this guide have a subsection that explains what they are in greater detail.

A This guide is for the default version of Collections—your organisation may have different fields or databases.

# **Start Collections**

Each of the steps in this getting started guide is an important task you will probably want to do every time you work with Collections. To make yourself comfortable with the program, this guide is designed so that if you follow it in order, you will have created and then searched for your first record—all in just a few minutes! Let's get started.

- 1. Open your internet browser
- 2. Go to the site where your organisation's copy of Collections is

A dialogue box will ask you to log in to Collections

AXIELL	
Username	Username
Password	Password
	SIGN IN

- 3. Enter your Collections username and password
- You can get your username and password from your system administrator.
- 4. If your organisation uses both Calm ALM and Calm for Records Management, there will be a drop-down box, too. Choose Archive for ALM (whether you are an archive or museum) and Records for Record Management
- 5. Click SIGN IN

You are now in Collections. The <u>main menu</u> is at the left and you can choose any option from it and begin working



#### The Main Menu

This is displayed at the left of the screen, no matter where you are in Collections. It allows you to navigate the program at a high level, for example by choosing <u>databases</u> to work in or logging out.

	Minimise the main menu to display only the icons.
*	Close the <u>database</u> you are in and return to the <u>main menu</u> .
	Create a new record in a <u>database</u> of your choice.
Q	Look for records in a <u>database</u> of your choice.
	Change the language Collections uses to display options (but
	not the language you use to enter data).
Aas	
	not the language you use to enter data).

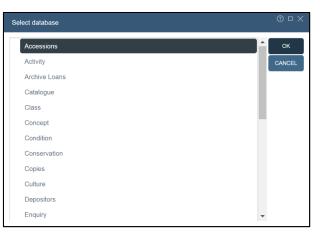
# Create a Record

The Catalogue is where records of items your organisation owns will be stored, so it is probably where you will spend most of your time in Collections. Try creating a record there.

Start anywhere in Collections:

1. Click New on the main menu

A dialogue box will ask you to choose which <u>database</u> you want to create a record in



2. Click the name of the database you want to create a record in

Select database	© □ X
Accessions	^ ок
Activity	CANCEL
Archive Loans	
Catalogue	
Class	
Concept	
Condition	
Conservation	
Copies	
Culture	
Depositors	
Enquiry	•

3. Click

A new record will be created in edit mode

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Record details						<b>B</b> 4	Action	+	Ø	00	currence	a   ~	Featur		<b>0</b> 0
IDENTITY															•
Repository	Museum					×									
CONTENT															•
PRODUCTION															•
LOCATION DETAILS															•
ACCESS															•
PHYSDESC															•
CONTEXT															•
ALLIED MATERIALS															•
REPRODUCTION															•

#### Databases

Collections is made up of different <u>databases</u> to hold records for different types of information. For example, the Depositors <u>database</u> holds records of people who have donated items to your organisation. Always be sure to go into the correct <u>database</u>— if you want to edit records in the Catalogue, for example, do not click on Accessions or Depositors.

# Give a Record a Type

You've made a record now, but it probably doesn't have many fields on it. You need to give it a record type so Collections knows which fields it needs. We'll use Collection, which is for collection- or fonds-level archival records.

Start on a record that is open in <u>edit mode</u> (records that have just been created are in edit mode. If a record is in <u>display mode</u>, clicking *S* will put it in <u>edit mode</u>):

Catalogue	M	•	*	M	۹	≣		#	↔	⊞	Ø	?	Ð
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Repository	Museum					×							
CONTENT													•
PRODUCTION													•
LOCATION DETAILS													•
ACCESS													•
PHYSDESC													•
CONTEXT													•
ALLIED MATERIALS													•
REPRODUCTION													•
CATALOGUE STATUS													•
ISSUEDETAILS													•
LINKED_DATA													•
ADMIN DETAILS	(hao												•
UNGROUPED FIELDS	, dm												•

1. If there are no fields visible under ADMIN DETAILS, click ADMIN DETAILS

The ADMIN DETAILS fields will appear

ADM	MIN DETAILS				*
				Creator admin	Created 2018-05-0
	Modifier	admin	Modified 2018-05-0		
	Record Type	h			•

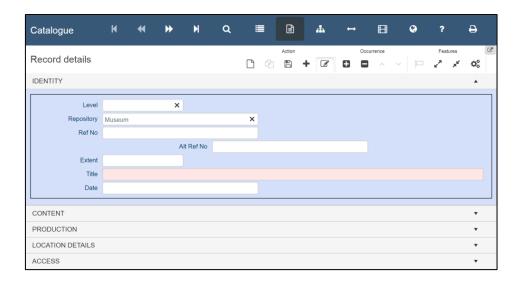
#### 2. Click in the Record Type field

Collections will display a list of available record types

			Creator admin	Created 2018-05-0
Modifier	admin	Modified 2018-05-0		
Record Type				•
				^
JNGROUPED FIELDS	Analytical			
	Article			
	Association			
	Biography			
	Book			
	Collection			
	Component 15			

3. Click the record type you would like to use

The fields for this record type will be displayed and can now have data entered into them



#### **Record Types**

Many <u>databases</u> include different <u>record types</u>. A <u>record type</u> tells Collections which <u>fields</u> a record should have and generally different <u>record types</u> are used for different types of material. For example, the Collection <u>record type</u> is used for top- (collectionor fonds-) level archival materials. The Component <u>record type</u> is used for all other levels of material. This allows Collection to include <u>fields</u> that relate to a collection as a whole (such as Archival History) but not <u>fields</u> that relate to individual items, such as Condition, which are on the Component <u>record type</u>.

# Edit a Record

Start on a record that is open in <u>edit mode</u> (records that have just been created are in edit mode. If a record is in <u>display mode</u>, clicking *it will put it in <u>edit mode</u>*):

1. Click in a field you would like to add data to

Ref No	I
--------	---

 Type in the data you would like to add to the <u>field</u> (if there is an icon at the far right of the <u>field</u>, you may need to click that icon instead. See the table below for how different <u>fields</u> work)

Ref No JS
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Some fields, called 'mandatory fields', must have data in them. Before you move on, make sure you've filled in the Title field. To give this record a unique identifier, it would be a good idea to fill in the Ref No field. For your first record, enter the details of the papers of the politician Jane Smith:

Object number JS

Description The Jane Smith Collection

#### Fields

Not all <u>fields</u> work the same in Collections because not all <u>fields</u> need to hold the same type of information. You can tell what sort of information needs to go into a <u>field</u> while in <u>edit mode</u> based on its colour and icons that appear in the far right of the field.

	An exact date in the form YYYY-MM-DD. Click the icon to choose a date from a calendar (or you can type one in).
G	An exact time in the form HH:MM:SS. Click the icon to choose a time from a list (or you can type one in).
ŧ	A link to another database using the identifying number in that database. Click the icon to see a list of records you can link to.
•	A list of options. Click the icon to choose from the possible options.
×	A list of options. Start typing in the field to see options that match what you have entered.
<u>1</u>	A file from your computer. Click the icon to choose a file.
\$	A number. Click the icon to increase or decrease the number (or you can type one in).
[white background]	Any text or numbers. Start typing in the field to enter data.
[red background]	This field is mandatory—there must be data in it if you want to save the record.

## Save a Record

Now that you've put some data on this record, you probably want to save it. Whenever you move away from a record (for example by going to another record or searching a different database), Collections asks whether you want to save the record, but you can also manually save a record. Let's do that now.

> Q ₽ • ₩ М **.** + ۲ Catalogue Record details p + C 0 0 2 **L** 4 ,× 0 IDENTITY . Level × Repository Museum × Ref No JS Alt Ref No Extent Title The Jane Smith Collection Date CONTENT

Start on a record that is open in edit mode:

#### 1. Click 🖺

Changes you have made to the record will be saved and it will now be in  $\underline{\text{display}}$   $\underline{\text{mode}}$ 

Catalogue	M	*	*	М	۵	:		ľ		đ.	1		۲	?		₽	
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Record details						$\square$	ආ	B	÷	Ø	8			**	*	$\mathbf{Q}_{0}^{0}$	
IDENTITY																	
Level Repository Ref No			A	lt Ref No													
Extent																	
Title	The Jane	Smith C	ollection														
CONTENT																	

#### Edit Mode and Display Mode

When a record is in edit mode, it can be edited in the record details <u>view</u>. A record in display mode cannot be edited in the record details <u>view</u>. You can tell that a record is in edit mode because all the <u>fields</u> that you can edit will be shown as white or red boxes.

A field in edit mode:	Ref No	JS
The same field in display mode:	Ref No	JS

# See a Different View of a Record

Up until now, we have been working in the record details view, which shows you all the fields on a single record and allows you to edit them. However, Collections gives you access to many different views that emphasize different information: for example, the media viewer view shows you all image, video, and audio files linked to the record you are on. Try opening and then closing the hierarchy browser view (<sup>th</sup>).

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IDENTITY													
Level													
Repository	Museum												
Ref No	JS												
			A	It Ref No									
Extent													
Title	The Jane	Smith C	ollection										
Date													
													]
CONTENT													•

Start on a record in either edit mode or display mode:

1. Click the icon of any <u>view</u> you wish to open (for example 🔤) on the top toolbar

The <u>view</u> will be opened alongside any other <u>view</u>s you have open

Catalogue	М	*	₩	м	Q			# 	↔	۲	?	₽
Record details	C 42	Action	<b>9 +</b>	Features	¢\$	(	lierarch CatalogueN DbjectNuml	y brows lumber	er		C	¢ <sup>6</sup>
IDENTITY						F	RefNo					
Extent	Ref No	ection				Č	JS • The J	lane Smith (	Collection			
CONTENT												

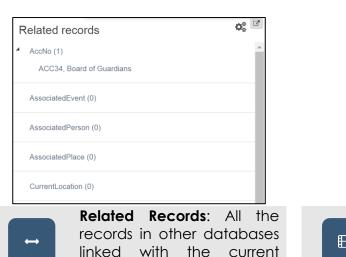
 Click the icon of any <u>view</u> you wish to close (for example ) on the top toolbar The <u>view</u> will be closed

Catalogue	M	*	₩	M	۹	1		ľ		<b>.</b>	↔	•	?		₽	
Record details						Ľ	ආ	Action	÷	ľ			Featur	res	¢\$	Ľ
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Level																٦
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Ref No	JS															
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Extent																
Title	The Jane	e Smith Co	ollection													
Date																
CONTENT																_
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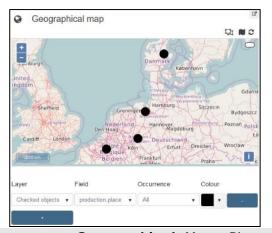
#### Views

Collections gives you access to eight different <u>views</u>, which are different ways of seeing a record's information. You can use as many <u>views</u> as you think are necessary and hide any you are not currently using. <u>Views</u> are opened and closed using the toolbar at the top of Collections (called the 'top toolbar'). Collections contains the following <u>views</u>, although your organisation might not use all of them:

	Abstract • Search	term Q 🗹 🖬 🛱 🛱	Features © Q, ± ≣ ⊡ ¢;	Search	Items Feat
				accession_date	
•	RoTNo PL/3/1/8	Minute book (No. 11)	2 May 1862-1		
	PU3/1/9	Minute book (No. 12)	26 Jan 1806	house the second s	
SubSection	PL/3/10	Havant Union	1856-1930		and the second
E Item	PL/3/10/1	Minute book	10 Jun 1858		1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1
E Item	PL/3/10/10	Minute book	21 Feb 1895		
E Item	PL/3/10/11	Minute book	31 Mar 1898		2 AMAR MAR
E Item	PU3/10/12	Minute book	15 Aug 1901		
	PL/3/10/13	Minute book	1 Dec 1904-1	State State State	
	PL/3/10/14	Minule book	29 Oct 1908		
E Item	PL3/10/15	Minute book	9 May 1912-2 • 2328 ITEMS	1 2	3
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Level Repository Ref No Extent Title Date	Item Hampshire Record Office PU/3/10/10 At Ref No Minute book 21 Feb 1895-29 Mar 1896 Con Co the	PLarrorio PCATORIO PCATORI PCATORIO PCATORIO PCATORIO PCATORIO PCATORIO PCATOR	the fields d, called ord'. Most	<ul> <li>1 · Farnborough Incorporation</li> <li>2 · Incorporations under Gilbert's /</li> <li>3 · Boards of Guardians</li> <li>1 · Alresford Union</li> <li>2 · Alton Union</li> <li>1 · Minute book (vol D)</li> <li>2 · Minute book (vol E)</li> </ul> Hierarchy record is used for	Act of 1781-2 <b>y Browser</b> : Th y the curren



record.



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Geographical Map: Places on the current record (and all records selected in the result set view) on a map.

⊞

Help

?

Media Viewer: Images, video, and audio linked to the current record.

# Perp Part Use this field to indicate what part this item forms of the whole object. Examples: 4 a - f (for 6 parts labelled a to f) Please note!

This is based on the Historical Object Card system, which is not part of the Spectrum standard. Use the 'Numbers | Relationships' tab to link the recording information for a set of objects with each part.

> Help: Shows information about what you should put in the field that your cursor is hovering over in the record details view.

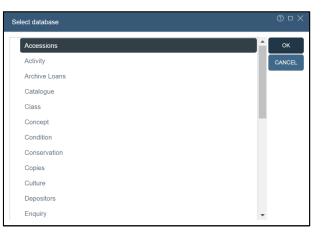
# Search for a Record

You've made a record, so now try to use Collections to find it.

Start anywhere in Collections:

1. Click Q Search on the main menu

A dialogue box will ask you to choose which database you want to search in



2. Click the name of the database you want to search in

Select database		⑦ □ ×
Accessions	•	ок
Activity		CANCEL
Archive Loans		
Catalogue		
Class		
Concept		
Condition		
Conservation		
Copies		
Culture		
Depositors		
Enquiry	-	

3. Click

A dialogue box will allow you to run a search

earch Catalogue		0
STANDARD ADVA	ICED	
Ref_No	equals •	EIND
Alt_Ref_No	equals	CANCEL
Title	equals	
Subject	is equal to	SETTINGS
Description	equals	Fields
Object_Number	equals	
Object_Name	is equal to	And     Or
Record_Type	is equal to	▼ Or
DatesOfExistence	is 🔹	

#### 4. Click in a field you wish to search

Title equals	• I
--------------	-----

#### 5. Type in a word or words you wish to search for

Title	equals	J	•	jane

#### 6. Click the box with an -

A list of possible ways to search will appear

Title	equals	•	jane
Subject	Ű	Q	
Description	equals		
Object_Number	does not equal		
Object Name	contains any		
	does not contain any		
Record_Type	contains phrase		<b></b>
DatesOfExistence	does not contain phrase		
Disposal_Date	contains all		(e-9)
· -	does not contain all	-	
Disposal_Method	is equal to	•	

7. Click the way you would like to search the field

Title	contains any	▼ jane	

#### 8. Click

Any records that match your search will be opened

Catalogue	K	•	≯	M	Q			•••	ľ	#	t		0	?	Ð
Abstract	Search Search Items Per C	ch term	ୁ ଜ	<b>1</b>	Features	¢ŝ	I	Reco	ord de	tails	Act Features	- +	6	Occurrence	~
								IDENT	TITY						
Level	Object	Number			Ref No JS		*	Repos Re	Level sitory M ef No J; xtent Title Ti Date			n			
								CONT	ENT						

Remember, you entered data into several fields when you created the record. Try to find the record you made based on what you entered in the Title field now.

### The Search Dialogue Box

In just a small space, the <u>search dialogue box</u> (shown below) gives you lots of options for how to run a search. You can search on more than one field at once by putting text in more than one field. Also, you can change how Collections compares the text you search for to the fields you are searching—whether you would like it to find one of the words you searched for ('contains any') or all the words ('contains all') or to match your search exactly to the field ('equals').

Search Catalogue		@ ×	
STANDARD ADVANCED			
Ref_No Alt_Ref_No Title Subject Description Object_Number Object_Name Record_Type DatesOfExistence Disposal_Date Disposal_Method Disposal_New_Object_Number Disposal_Note	equals   equals   equals   is equal to   equals   is equal to   is equal to	EIND CANCEL SETTINGS Fields • And • Or	If you want to change the fields that will appear in the <u>search</u> <u>dialogue</u> <u>box</u> , do so here

<b>Equals</b> : what you type in will exactly match the contents of this field on the records you find <b>Contains</b> : what you type in will be somewhere in this field on the records you find <b>Is Empty</b> : this field will be empty on	Enter the text that you would like to search this field	If you have typed into more than one field, choosing 'Or' means that Collections looks for records that match one of these fields, whereas choosing 'And' means that Collections looks for records
the records you find	for	that match every field
<b>Contains</b> : what you type in will be somewhere in this field on the records you find <b>Is Empty</b> : this field will be empty on	would like to search this field	one of these fields, where choosing 'And' means th Collections looks for recor

# Link to a Record in Another Database

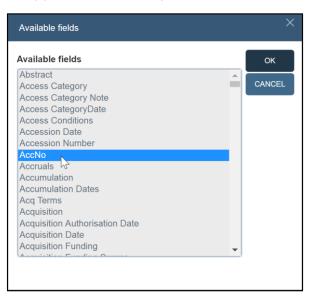
Everything you have done so far has taken you through the basic steps of using Collections which is all you need to get up and running. Linking a record to a record in another database (for example, to indicate that a catalogue record came to your organisation as part of an accession documented in an accession record) is slightly more complicated, but can be very useful. Try linking a catalogue record to an accession record (but be aware you must have already created an accession record to link to!)

Start on a record that is open in <u>edit mode</u>. The record you would like to link to should already exist in the other <u>database</u>:

Catalogue	K	*	₩	M	Q			Ē	#	+	₿	۲	?		₽	
Record details	S					Γ	4	Action	+ 🕝	0	Occurrence	~   F		itures	¢;	Q
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L	evel.			×		 										
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				Alt	Ref No											
E	ktent															
	Title	The Jane Sr	mith Colleo	ction												
	Date															
CONTENT																

#### 1. Click +

A dialogue box will appear that allows you to add fields to the record



- 2. Click the field that is used to link to the <u>database</u> you would like to link to
- 3. Click

Catalogue	M	•	*	M	۵	:	•			<b>Å</b>	ţ	B	I	۲	?		₽	
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4. Click the ≒ at the right of the field you just added

A search dialogue box will appear, allowing you to search for records in that  $\underline{database}$  you can link to

Search Accessions				() ()
STANDARD ADV	ANCED			
AnyText	equals	•		
Acc_No	equals	•	jane	
Ref_No	equals	•		CANCEL
Title	equals	•		SETTINGS
Deposit_Date	equals	•		
Receipt_Date	equals	•		 Fields
Receipt_Return_Date	equals	•		And
Priority	equals	•		Or
Repository	equals	•		

5. Fill out the search dialogue box as you would to find the record you wish to link to and click

• For more information about searching, see Search for a Record, above

A dialogue box will appear showing you records that match your search

Find data for the field 'AccNo'					@ ×
View table				SELECT	
AccNo	Entry Number	Title		CANCEL	
ACC2		The Jane Smith Papers	*	DETAILS	
	U U			Filter	
				Show candidate terms	
				Term creation	
				CREATE TERM	
			Ŧ		
Enter search key		FILTER CLEAR			

6. Click the record you wish to link to in the list

#### 7. Click SELECT

The identifying number of the record you would like to link to will be filled in to the <u>field</u>. A link has been made between the two <u>databases</u> that will be reflected in the related records <u>view</u>. When the record is in <u>view mode</u>, clicking the identifying number will show information from the record it is linked to

