



Calm for Museums

Introductory Guide
for
New Users

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

Axiell Ltd.
Hall View Drive
Bilborough
Nottingham, NG8 4GD

Tel (0115) 9008000
Fax (0115) 9425718

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Contents

Introduction.....	2
Finding Your Way Around Calm.....	4
Setting up Calm and using Calm Admin.....	8
Workflow	9
Object Entry and Loans In	10
Catalogue.....	15
Appendix 1 – Field Types and Attributes.....	22
Appendix 2 – Keyboard Shortcuts	24
Appendix 3 – Tool Bar Buttons.....	25

Introduction

Calm is made up of a number of different, inter-connecting databases (for example, the catalogue) which link together to create a complete collections management system.

Each database contains records. Records may be created in several different databases to record the progress of material through the collection. For example, preliminary information, recorded when material first enters a collection, is written in the Object Entry database, while fuller, more detailed records about material are created in the Catalogue database.

Many of the databases in Calm have several record types available. Think of these as templates containing fields suited to recording different types of material. For example, the Catalogue database includes Object and Photograph record types.

Each record contains many fields. Fields can be completed with data by; typing text, copying and pasting information, or importing data. The different fields in Calm are designed to accommodate a variety of information including text, numbers, dates and times. In addition, images and original source documents including sound files and video clips may be linked to Calm records using specific fields. The fields may also be customised, for example, by being added or removed from record types, re-labelled to give them a different name when displayed on a record, or having terminology control (such as picklists - see Appendix 1) applied to them.

The main Calm databases are:

Object Entry and Loan In	The recording of new gifts or deposits and the retrospective entry of objects and loans in. See page 10 for details.
Catalogue	The main source of information about museum material held. See page 15 for details.
Depositors	Holds contact data of depositors, lenders and owners. Links to the Object Entry and Loans In database. See page 10 for details.
Associated (Authority) Files	Sources of information on standard terminology, for example, personal names frequently referred to. Authority records are linked to Museum catalogue records via the Associated button on the left hand button strip.
Locations and Movement	Designed to record a hierarchical list of your storage locations. Location records are linked to catalogue records to indicate which items are stored in each location. May be used for stock checking. Museum catalogue records may have both a Normal Location and a Current (or temporary) Location linked to them. When an object is moved to a different location (changing the normal or current location on the museum record), Calm will automatically create a movement history record and store it in the Movement database.
Images	Records technical metadata about your digital images, including thumbnails of each image. The Images database is an add-on to the standard Calm system.
Loan History	Records loans out. This database stores records about current loans out, previously returned loans as well as loans yet to be issued.

Conservation	<p>Tracks conservation work carried out on an item, creating a permanent record.</p> <p>Material is transferred to this database from the Catalogue database via the ConservationPriority field (on a Catalogue record). The contents of the 'Condition' field on the Catalogue record are copied to the 'ConditionBefore' field in the Conservation database. When the conservation work is complete and the item is returned to the Catalogue, the contents of the 'ConditionAfter' field on the Conservation record are copied to the 'Condition' field on the Catalogue record overwriting existing text.</p> <p>Records in this database are completed by an in-house conservation unit. Alternatively, it can be used to record work carried out by external conservators.</p>
Enquiries	<p>Supports enquiry recording, and delivery of responses. Can generate mail merge report responses directly from the database. Enquiries are linked to their enquirers via records in the Users database (described below).</p>
Users	<p>Stores contact details which link to the Enquiries and Loans Out databases.</p>

Finding Your Way Around Calm

Running Calm

Press the Windows Start button and select Programs. Calm will be found in the Axiell program group. Click on whichever version you have installed, for example, **Standalone – Calm ALM** or **Client – Calm ALM**.

The First Screen

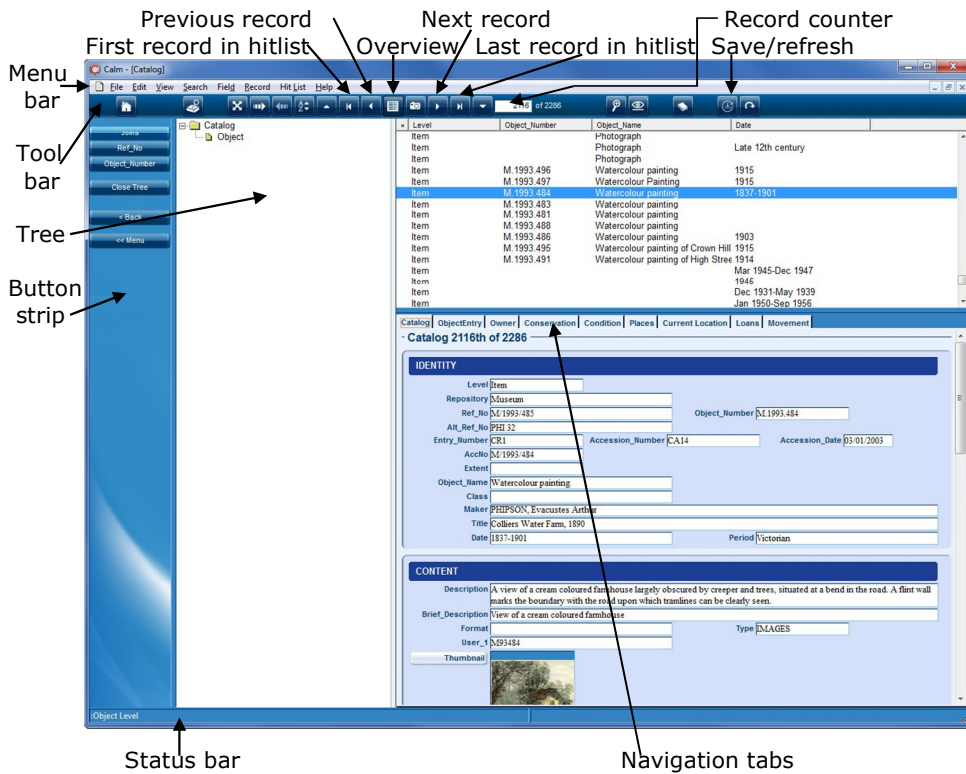
Calm opens with the main menu displayed, as shown:



Click on buttons with an arrow to the right of the text, to find sub-menus and continue clicking on options until you reach the function that you require. To navigate back through the menus, look for menu buttons with reversed arrows which indicate that you can move back to previous menu options.

The Calm Window

The Calm window is what you see when you have any record in any database on screen, whether you are adding a new record, editing an existing record or reviewing the results of a search. Below is an example, showing a Catalogue record, with various buttons and useful parts of the screen explained.



Overview button – Shows or hides a list of all records found (selected fields only) in the top half of the screen. In the example above, the overview IS shown. Click on the field labels (column headings) to sort by that column. (Use the 'Sort' option on the Hit List drop-down menu to sort on multiple fields). Right-click on column headings to add extra fields (up to 7 in total). You can manipulate the current hitlist of records (for example, drop selected records) using the mark/unmark record feature, which is shown as the first column in the overview. Use the options in the Record drop-down menu to drop marked or unmarked records from the list.

Record counter – Shows where you are in the list of currently selected records. For example, 1 of 238, means you are viewing the 1st record and the total number of records is 238.

Save/Refresh button – Records can be quickly saved by pressing this button or the F12 key on your keyboard. Also press this button to refresh the tree display (or right-click on an entry in the tree and choose 'Refresh!').
Calm automatically saves the current record when you move between records, but it can be convenient when entering large amounts of data to save without leaving a record.

The information shown in the overview and functions shown in the side button strip are dependent on the data you have saved.

Refreshing a record can be useful when you are looking at the tree structure as you will not be able to see new records until you have refreshed (which lets Calm know what changes you have made).

Menu bar – Shows a list of menus. The menus follow normal Windows conventions; click on one to make a list of options drop down, an arrow indicates a further menu and an ellipsis (...) indicates a dialogue box will follow. Many of the menu options have keyboard shortcuts displayed next to them. For a list of the most useful keyboard shortcuts available in Calm see appendix 2.

Tool bar – Contains buttons which give quick access to particular options. When you point your mouse to a button a ToolTip is displayed to describe the button's function. For a full list of the tool buttons and their functions see appendix 3.

Tree – The tree view provides a hierarchical view of all the records in a collection or group; this enables you to subdivide material into discrete hierarchical groups.

There are two types of trees – field trees which use fields such as ObjectNumber in the Catalogue database to show a hierarchy and joins trees which show the links between the current record and those in other databases. The tree view can also be used as the basis for adding records to a collection and manipulating the hierarchy.

Button strip – Dynamically alters to show buttons with functions that are relevant to the type of record that is currently displayed and to the data in its fields. Some of the buttons show arrows to indicate that they lead to a further menu.

Status bar – Shows information about the currently displayed record, including the record type, the name of the field where the cursor is currently positioned (also the original name if you have re-labelled it), whether the record is marked and if the record is locked by another user on the network.

Navigation tabs – Show the names of databases that are linked, or could be linked, to the current record. Clicking on a tab will take you to that database and the relevant record(s) will be displayed (if linked). To return to the original database and show your existing hit list, click on the < Back button on the button strip, rather than the navigation tab for the original database.

View options

It is possible to customize many of the features you see on the Calm window (such as font sizes and colours and whether field tips are shown) by selecting 'Options' from the View drop-down menu. The view options you set will apply only to your PC, and not to all the Calm PCs on your network.

Exiting Calm

There are two ways to exit Calm, both save your data; the usual way is via the 'Exit Calm' button on the Main Menu. This also saves local settings – overview fields, search dialogue boxes (including the field order), admin search dialogue boxes (including the field order), options on the Administration/Parameters menu and pop-up dialogue boxes (such as 'Options' from the View menu). The other way to exit is by clicking the 'X' in the top right corner of the window, this does not save your local settings. This may be useful on client-server or hosted systems where you have temporarily changed settings, for example re-arranged your overview fields and don't wish to retain them.

Setting up Calm and using Calm Admin

If you are the first person in your organisation to start using Calm you will need to read this section, as there are a number of functions which need to be defined before you can begin to use Calm to enter data.

Validation options – Calm will automatically validate your input when you save, or exit from, a record. To decide which types of validation are performed choose 'Options' on the Record drop-down menu. We recommend that you choose ALL validation options before beginning to use Calm.

Most of the other functions are edited in the Calm Admin program, such as:

- Setting up 'picklists' (a list of valid entries for a particular field) and default contents to make data entry quicker and consistent
- Setting up serial numbers to be added automatically to records when they are created
- Changing or adding field comments

Calm Admin

Calm Admin is a separate program which is installed with your Calm system. Use it to customise record types and fields, and for administrative actions such as re-indexing databases.

Please note: You must CLOSE all Axiell applications, such as Calm and CalmView (and its IIS session) before using the Calm Admin program. When running Calm Admin on a server, please remember to stop the 'DScribe Server/2' service first.

To run Calm Admin; press the Windows Start button and select 'Programs'. Calm Admin will be found in the Axiell program group. Click on whichever version you have installed, for example, **Standalone – Admin** or **Server – Admin**. We do not recommend that you run Calm Admin on your client machine.

Stopwords

If there are terms which occur frequently in your database and which you do not wish to find when searching, you can add them to the stopword list. Common words to have in the stopword list are "the", "and" and "with". To add a stopword list or edit it; run Calm Admin and select 'Re-index' from the File drop-down menu. There is a default stopword list supplied with Calm called stopword.lst which can be found in the DScribe/Archive folder of your Calm install.

Please note that every time you make a change to the stopword list, you are changing the rules by which Calm indexes its databases. You will therefore have to re-index any databases that use the stopword list before the changes will take effect.

Altering picklists

Various fields in Calm have a 'picklist' attached to them. They enable you to improve consistency and make searching more efficient by encouraging and enforcing the use of valid terms only (in fields for which picklists have been set). To add, remove or edit picklists; run Calm Admin, open the relevant database and select 'Pick List' from the Field drop-down menu.

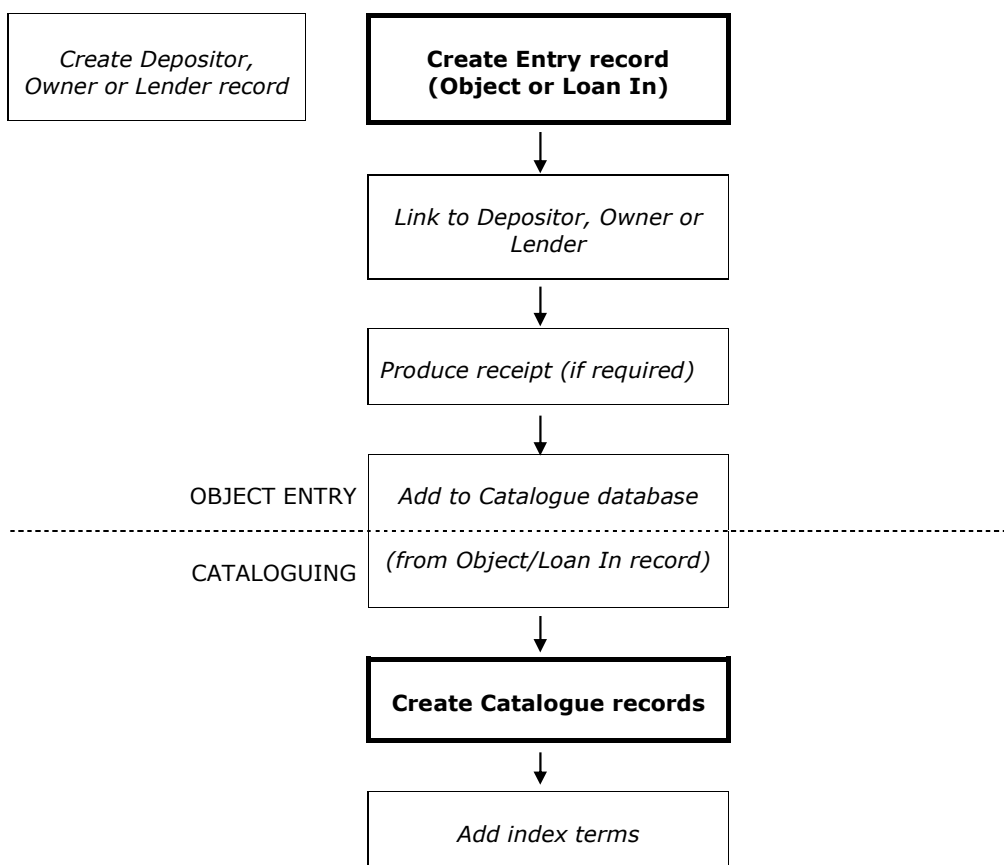
Workflow

Workflow for Object Entry and Cataloguing (also known as Listing)

Further details on the main steps are given below the workflow diagram.

Bold indicates main tasks, usually considered to be essential to the process of object entry or cataloguing.

Italics indicate optional tasks, depending on particular circumstances.



Object Entry and Loans In

Creating a Depositor, Owner or Lender record

From the Main Menu, select Museum Menu, then the Depositors Menu.

The text below describes how to create a Depositor record, but the principle is the same for Owner or Lender records. They are all classed as 'Depositor' record types and stored in the Depositors database.

Search for the name of the Depositor. If there is no existing record for the Depositor, create a new one and complete it with the name and details of the depositor as described below.

Fields are shown here in the default order that they will appear on screen when you install Calm. This order can be changed using the 'Order/Group' option on the Field menu of the Calm Admin program.

Contact	The name of the depositor/contact person in the depositing organisation. This field is authority controlled (see Appendix 1). Enter names in natural language order here if you wish to produce reports from the Object entry/Loans in database.
Depositor	The name of the organisation that the Depositor belongs to or private individual. This field is authority controlled (see Appendix 1). Enter names in natural language order here if you wish to produce reports from the Object entry/Loans in database.
Address	Do not delete this field as it is required by the Calm system.
Tel	Telephone number with dialling code where known e.g. (01987) 654321
Fax	Facsimile number, if any
Email	Electronic mail address, if any
DpstrId	Do not delete this field as it is required by the Calm system to link the Depositor and Object entry/Loans in databases. A unique number (prefixed by 'D' as a default), the next available number is automatically assigned from the Calm Admin program.

Please note: The Contact, Depositor and Address fields are used when producing receipts for depositors (see page 14) via the report function in the Object entry/Loans in database.

Creating an Object Entry or Loans In record

The Calm database that stores object and loan in records is called Accessn. The Accessn database is the equivalent of the Entry and Loans In forms used by most museums.

From the Main Menu, select Museum Menu, then the Object Entry & Loan In Menu. Create a new record and complete it with basic information about the material as described below. The most important things to do at the Entry stage are to assign a unique entry number (EntryNumber field) and to record as much information about the object and its provenance as possible (EntryNote field).

Below is an introduction to key fields in Object and Loan in records. We have listed those that interact with other databases or are used by the Calm system, but generally it is up to you to decide what information to enter into which fields.

Fields are shown here in the default order that they will appear on screen when you install Calm. This order can be changed using the 'Order/Group' option on the Field menu of the Calm Admin program.

Fields in bold are mandatory and must be completed to allow the record to function properly within Calm.

Accessioned	Optional. Contains of a picklist of Yes/No. You may wish to choose "Yes" to confirm that you are officially accessioning the object(s) or material into your collection.
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ENTRY DETAILS

Entry Number	Do not delete this field as it is required by the Calm system. Enter the number for this entry. A rolling entry number can be set up in Calm Admin. If this has been done, place your cursor in the Entry Number field and press the Insert key on your keyboard for the next number; alternatively you may enter the number manually. The entry number may be compiled of letters and numbers, but must be unique, as Calm will use the Entry Number field to identify the record and link it to records in the Catalogue database if required.
Entry Date	Record the precise date on which an object entered the museum. This field is a Calm date field type. The system date from your computer may be added to the Entry Date field automatically by placing the cursor in the field and pressing the INSERT key. Alternatively if you require a different date you may type it manually.
Entry Note	Describe in detail the object or objects entering the museum. You may type up to 64,000 characters into this field (it's a wrapped text field, see appendix 1), or copy and paste text in.

OBJECT ENTRY AND LOANS IN

Number Of Objects	Do not delete this field as it is required by the Calm system. The number of objects that make up the entry. Usually each entry form will refer to one object, but it is possible to enter a higher number. Later, when you transfer your Entry into the Catalogue database, Calm will automatically create the number of Catalogue records you have entered here.
Museum Rep	The identity of the Museum Officer who dealt with this entry. You may type your name or initials into this field. Alternatively use Calm Admin to set default text for this field.

DEPOSIT DETAILS

Object Add Date	Do not delete this field as it is required by the Calm system. When you add this Entry record to the Catalogue database (see page 21), this field is automatically filled with the current date.
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Linking a Depositor record (a Depositor, Owner or Lender) to an Object entry or Loan in record

This illustrates a link between the Depositor, Owner or Lender and the material they have deposited or lent.

The details of the process are shown below, but generally records in Calm are linked in this way; from the core record (Object Entry/Loan In in this case) click the relevant link button in the side button strip, a search dialogue box will appear, find the record to be linked (it must already exist) and click OK. You are then returned to your core record, linked fields will automatically appear and selected fields from the linked record will be shown at the bottom of your core record. A navigation tab will also appear at the top of your core record, click on this to view the linked record.

Only one depositor and one owner may be added to each Object entry record. Only one depositor, one lender and one owner may be added to each Loan in record.

The text below describes linking a depositor, but the process is the same for adding an owner or lender.

With the Object Entry or Loan In record you want to link, on screen:

- Click the 'Depositor' button in the side button strip. A 'Select Depositor' dialogue box will appear.
- Search for the relevant depositor, you may wish to search by depositor name, in which case you need to ensure that you are typing your search criteria into the Contact field (the Depositor field is used for the organisation name) in the search dialogue box. If the full text appears as you start typing; click on it to add it to the search dialogue box.
- Click the 'Find' button.
- You will be asked to confirm if the depositor record is the correct one. To search again, click 'No'. If there is no existing depositor record, you will need to create one from the Depositors Menu.
- You are then returned to your Object Entry or Loan In record.

Producing Receipts for Depositors, Owners and Lenders

Calm can produce receipts (and covering letters) in acknowledgement of deposited or loaned items, either when creating a new (object entry or loan in) record or retrospectively for a hit list of records. Receipts are produced using the mail merge facility in Microsoft Word.

- Search for the Object entry/Loan in record(s) you wish to print a receipt(s) for.
- Click the 'Reports' button in the side button strip, followed by the 'Receipts' button.
- Microsoft Word will open. Confirm that you want data from your Calm database to be used.
- A default receipt template will be displayed. Customise the template to meet your needs.
- Perform a mailmerge as you normally would with your particular version of Microsoft Word. For example, in Word 2007, select the 'Mailings' tab, click on 'Finish & Merge', then choose 'Edit Individual Documents...' and choose to merge all records. In older versions of Microsoft Word, click the 'Merge to New Document' icon on your Word Mail Merge toolbar and choose to merge all records.
- Print as required using the normal Microsoft Word functions.

Returning Loans In

For a Loan In to be returned, the objects must have been added to the Catalogue (see page 21).

With the relevant Loan In record (in the Accessn database) displayed on screen; click the 'Return Loan' button in the button strip. A dialogue box will appear which displays the Object Numbers of all the objects on the Loan In, **highlight the item(s) you wish to return**. You will need to enter a Despatch Reference and optionally the Despatch Method and Despatch Contact, then press the 'Return' button.

A Movement record will be created for each object that has been returned. The Despatch Reference that you have entered will be stored in the Movement Reference Number field and the Movement Note. The Despatch Method and Despatch Contact that you have entered will be stored in the Movement Method and Movement Contact fields. Today's date will be automatically entered in the Removal Date field.

The Loan In record will remain the Accessn database, with today's date automatically added in the Return Date field. The object record(s) will remain in the Catalogue database.

Field Code Changed

Catalogue

The catalogue is the core database of the Calm system and can be used to house a descriptive record for every item in your collections. Please note: to use the functionality of the Loans Out, Conservation, Locations and Movement databases, you need to create a Catalogue record for each unit that you wish to manage.

In museum terms the most important record type in the catalogue is Object. The ObjectCollection record type may be used to represent levels in a collection by creating groups of records in a hierarchical structure. The ObjectCollection record type is designed to catalogue groups of records at the highest level. Object records are designed to catalogue individual items.

The fields in the record types are grouped into blocks and conform to SPECTRUM (the U.K. museum documentation standard).

The Catalogue database can also be searched by CalmView software (produced by Axiell). This is a web server module that you can use to provide public access to selected Calm records over the internet or your intranet. (As part of the CalmView configuration, you select which fields are visible and which records can be viewed).

The structure of your collections in Calm can be represented as a family tree with 'parent and child' links between catalogue entries. The levels in the tree are defined by the ObjectNumber field, it uses full stops (.) to represent a new level in the hierarchy.

Entering Catalogue data

There are four ways:

- Writing a completely new record
- Modifying an existing record to make a new one
- Transferring information from an object entry or loan in record
- Importing (e.g. from Microsoft Word or Microsoft Excel)

The following explanations describe the first three options in more detail.

Creating a new Catalogue record

From the Main Menu, select Museum Menu, then the Catalogue Menu. Create a new record and select a record type.

Below is an introduction to key fields in the Object record template in the Catalogue database. We have highlighted fields that interact with other databases, are used by the Calm system or are SPECTRUM fields, but generally it is up to you to decide what information to enter into which fields.

The fields listed below appear in the Object record type by default. There are many additional fields available, which you can add to a record by selecting 'Insert' from the Field drop-down menu. Fields are shown here in the default order that they will appear on screen when you install Calm. This order can be changed using the 'Order/Group' option on the Field menu of the Calm Admin program.

Fields in bold are mandatory and must be completed to allow the Catalogue record to function properly within Calm.

IDENTITY

Repository	Select an entry from the picklist or enter if items are held elsewhere. Alternatively use Calm Admin to set default text for this field. This field is used for data exchange; it is required for Europeana.
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Object Number	<p>Do not delete this field as it is required by the Calm system. SPECTRUM field.</p> <p>A unique identifier for the object used by Calm to create the order and structure of the catalogue. Enter a number or combination of numbers and letters.</p> <p>This field is used to create the tree hierarchy; it is built from the first element that you enter in the Object Number.</p> <p>WARNING! Do not use asterisks or spaces in this field. Use full stops to denote a new level in the hierarchy. Hyphens and forward slashes are acceptable, but we do not recommend the use of any other symbols in this field. Prior to version 9 of Calm, use of these symbols is even more likely to cause severe disruption.</p> <p>When a condition check is performed, a record is created in the Condition database and the contents of this field are copied to the ObjectNumber field on the new Condition record.</p>
Entry Number	Do not delete this field as it is required by the Calm system. SPECTRUM field.
Accession Number	Used for your unique Object Accession numbers. These may be the same number as the ObjectNumber, if appropriate, or a different numbering system if required.
Accession Date	SPECTRUM field. Enter a date, in the format dd/mm/yyyy.
Number of Objects	SPECTRUM field.
Object Name	<p>SPECTRUM field.</p> <p>The short name by which the object or objects are to be known. More detail may be entered in the Brief Description field. The contents of this field are shown in the hierarchical tree in Calm and also CalmView.</p>
Object Name Type	SPECTRUM field.

CONTENT

Brief Description	<p>SPECTRUM field.</p> <p>Summary description of the record, where the Object Name alone is not adequate.</p>
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PRODUCTION

Object Production Note	SPECTRUM field.
Object Production Place	SPECTRUM field. This draws from Associated Places stored in the Authority files (if you choose to use them).
Object Production Date	<p>SPECTRUM field.</p> <p>A period field type (see appendix 1). Dates must be entered in a valid format to ensure that they can be interpreted correctly when searching on this field.</p>

LOCATION DETAILS

Normal Location	Do not delete this field as it is required by the Calm system. SPECTRUM field. For permanent locations, such as storage locations. This is a link to the Locations database, once you have added a normal location via the side button strip, the Location Reference (from the Locations database) is displayed in this field.
Current Location	Do not delete this field as it is required by the Calm system. SPECTRUM field. For temporary locations, such as temporary exhibition spaces or museum offices. This is a link to the Locations database, once you have added a current location via the side button strip, the Location Reference (from the Locations database) is displayed in this field.

ACCESS

Closed Until	Do not delete this field as it is required by the Calm system. If you have set the Access Status field (see below) to 'Closed', enter a date here in the format dd/mm/yyyy. This date marks the end of the anticipated period during which the object should not be accessed.
Access Status	Do not delete this field as it is required by the Calm system. This field is used to restrict access to objects, for example, in accordance with deposit conditions. A picklist field (see appendix 1), defaults to 'Open'. Can be used as a filter in CalmView; change to 'Closed' if you do not wish the record to be shown to the public.

PHYSDESC

Physical Description	SPECTRUM field.
Colour	SPECTRUM field.
Completeness	SPECTRUM field.
Condition	SPECTRUM field. Choose from the picklist, as appropriate. When a condition check is performed, a record is created in the Condition database and the contents of this field are copied to the Condition field on the new Condition record and then blanked in the Catalogue record. This field is also used when a Catalogue record is moved to the Conservation database for work on the item. The contents of the field are copied to the 'ConditionBefore' field in the Conservation record and when the item is returned this field will automatically be updated (any existing contents will be overwritten) with the contents of the 'ConditionAfter' field from the Conservation database.

Condition Check Date	<p>This field doesn't appear in the record template by default. To add it to one particular record, use 'Insert' on the Field drop-down menu, alternatively use the Calm Admin program to permanently add it to the record template if you wish this field to appear in every record of this type (created subsequently).</p> <p>When a condition check is performed, a record is created in the Condition database and the contents of this field are copied to the Condition Check Date field on the new Condition record. This field is then filled in with today's date on the Catalogue record.</p>
Condition Checker	<p>This field doesn't appear in the record template by default. To add it to one particular record, use 'Insert' on the Field drop-down menu, alternatively use the Calm Admin program to permanently add it to the record template if you wish this field to appear in every record of this type (created subsequently).</p> <p>When a condition check is performed, a record is created in the Condition database and the contents of this field are copied to the Condition Checker field on the new Condition record. This field is then filled in with your Calm password, your Windows login name and your machine name, on the Catalogue record.</p>
Condition Check Method	<p>This field doesn't appear in the record template by default. To add it to one particular record, use 'Insert' on the Field drop-down menu, alternatively use the Calm Admin program to permanently add it to the record template if you wish this field to appear in every record of this type (created subsequently).</p> <p>When a condition check is performed, a record is created in the Condition database and the contents of this field are copied to the Condition Check Method field on the new Condition record and then blanked in the Catalogue record.</p>
Condition Check Note	<p>This field doesn't appear in the record template by default. To add it to one particular record, use 'Insert' on the Field drop-down menu, alternatively use the Calm Admin program to permanently add it to the record template if you wish this field to appear in every record of this type (created subsequently).</p> <p>When a condition check is performed, a record is created in the Condition database and the contents of this field are copied to the Condition Check Note field on the new Condition record and then blanked in the Catalogue record.</p>

Condition Check Reference	<p>This field doesn't appear in the record template by default. To add it to one particular record, use 'Insert' on the Field drop-down menu, alternatively use the Calm Admin program to permanently add it to the record template if you wish this field to appear in every record of this type (created subsequently).</p> <p>When a condition check is performed, a record is created in the Condition database and the contents of this field are copied to the Condition Check Reference field on the new Condition record and then blanked in the Catalogue record.</p>
Condition Note	<p>This field doesn't appear in the record template by default. To add it to one particular record, use 'Insert' on the Field drop-down menu, alternatively use the Calm Admin program to permanently add it to the record template if you wish this field to appear in every record of this type (created subsequently).</p> <p>When a condition check is performed, a record is created in the Condition database and the contents of this field are copied to the Condition Note field on the new Condition record and then blanked in the Catalogue record.</p>

CONS REQUIRED

Conservation Priority	<p>Do not delete this field as it is required by the Calm system. A picklist field, see appendix 1.</p> <p>This field is used by the Conservation module in Calm so the Conservator(s) can select which records are transferred for conservation.</p>
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DEPOSIT

Acquisition Method	SPECTRUM field.
Acquisition Date	SPECTRUM field. Enter a date, in the format dd/mm/yyyy.
Acquisition Note	SPECTRUM field.

CATALOGUE STATUS

CatalogueStatus	<p>Do not delete this field as it is required by the Calm system. A picklist field, see appendix 1.</p> <p>Defaults to 'Catalogued', change to 'Draft' if you do not wish the record to be accessed by CalmView and shown to the public.</p>
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ADMIN DETAILS

RCN	<p>Do not delete this field as it is required by the Calm system. Record Condition Number. This field is normally hidden but may be viewed by pressing F9 on your keyboard. A serial number (see appendix 1), automatically completed by Calm when a new catalogue record is created.</p> <p>Calm uses this field to uniquely identify catalogue records and link them to records in the Conservation database and to Condition records when required.</p>
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Modifying an existing record to make a new one

From the Catalogue Menu, select Search and find the record that you wish to use as a model. Select 'Record >' in the side button strip to reveal further options, then select 'Clone' . This makes an identical copy, complete with all data except the Object Number which you will need to allocate and the Accession Number.

Transferring information from an Object Entry or Loan In record

In the Accessn database, search for the entry to be added to the Catalogue. Select 'Add Objects' in the side button strip. Calm will create new catalogue records, linked to your Entry record (by the Entry Number field), according to the number you entered in the Number of Objects field on your Entry record. You will be asked to choose a record type for each catalogue record being created.

You will be returned to the Entry Record (which remains in the Accessn database); please note that the Add Objects field has been completed with today's date. Before proceeding to the catalogue database you may wish to complete the Accessioned field with 'Yes' from the picklist to confirm that you are officially accessioning the object into your collection.

Appendix 1 – Field Types and Attributes

Field Types

The field types available in Calm are described in detail in the online ALM manual, here's a summary:

Example fields from
the Catalogue database

3 types of text field:		
Text		Designed to contain paragraphs
Wrapped Text	Physical Description	Also designed to contain paragraphs. Will automatically "wrap" text around i.e. expand the field as you type
Line of Text	Repository	For smaller items of information
Tree	Object Number	These fields are used to generate the hierarchical tree view
Period	Object Production Date	A narrative date field, this has good flexibility with a wide variety of formats available
Date	Closed Until	A more simple date format; dd/mm/yyyy
Number	Age	Numbers with decimal places
Integer		Whole numbers, such as account numbers
Currency	Valuation	Monetary values
Time		Hours, minutes and seconds
Multimedia		Link to files such as images, sound, documents and video
Thumbnail		A small picture representing a full-sized image
Image		Link to an image file
URL		Web address, link to a website

Field Attributes

The following attributes can be applied to various fields in Calm. Run the Calm Admin program to apply, remove or customise them.

Authority controlled – When you start typing, a pop-up box will appear with similar entries that have previously been input into this field in other records. You can choose one of these entries or create a new entry.

Picklist – A preset list of valid content for this field. Picklists can be pop-up or drop-down. For pop-up picklists, double-click on the field to make the picklist appear, or start typing. An error message appears if someone tries to save a record which has invalid content (i.e. input doesn't appear on picklist). For drop-down picklists, click on the arrow to the side of the field and select from picklist. Helps encourage consistency in data entry.

Vocabulary – Similar to the (pop-up) picklist attribute described above. The difference is that vocabulary fields can contain more than one term from the valid list, picklists just one. Calm only validates this field when you have finished typing an entry.

Default content – Whenever a new record is created, fields with this attribute are automatically completed with the default text chosen. Useful when a field usually has the same content in every record. Helps with data entry consistency and saves time. Can be overwritten with alternative text, if wished.

Mandatory – Field must be completed. Calm will display an error message if someone tries to save a record in which a mandatory field is empty.

Serial numbers – Usually automatically completed with a rolling number by Calm, otherwise press the Insert button (INS) on your keyboard to get the next available number. Serial numbers may contain text prefixes and suffixes as well as numbers. Automatically generated serial numbers can be overwritten with alternative text, if wished. If you subsequently delete a record (or field) that contains a serial number, that number will not be re-assigned.

Unique – Field must contain data that is not duplicated in the same field in another record in the database, otherwise an error message is shown.

Appendix 2 – Keyboard Shortcuts





















Within Calm, there are keys and combinations of keys that can be pressed to perform particular functions. These are often quicker than selecting a menu and an option from that menu. It will save you time if you memorise the shortcuts for the options you use most. These keyboard shortcuts appear next to the equivalent option on the menus, those most frequently used are listed below:

F1	Help
CTRL + F1	Display current field comment (if any)
SHIFT + F3	Change the case of the selected text
F5	Search (create new hit list)
SHIFT + F5	Find all records
CTRL + F5	Move cursor to next occurrence of a hit term (only within a record)
F6	Command line search
F7	Show overview/Hide overview
F9	Toggle between source mode (shows path name – if any - and file name) and result mode (shows image or document icon or thumbnail) to insert documents or images or see created and modified fields
F12	Save record/refresh screen
CTRL + O	Display View Options dialogue box
ALT + BACKSPACE	Undo changes to record (since last save)
PLUS ON NUMBER PAD	Next record
SHIFT + PLUS ON NUMBER PAD	Last record (NUMLOCK must be off)
MINUS ON NUMBER PAD	Previous record
SHIFT + MINUS ON NUMBER PAD	First record (NUMLOCK must be off)
* ON NUMBER PAD	Mark/unmark the current record in the hit list
TAB	Move cursor to next field
SHIFT + TAB	Move cursor to previous field

Appendix 3 – Tool Bar Buttons

The tool bar shown at the top of every Calm Window (see page 5) contains buttons that allow quick access to particular functions, as listed below:

Field Code Changed

	Return to Main Menu
	Display/Hide tree structure for Subject Thesaurus. The Subject Thesaurus (or index) is an authority file database within Calm, it contains terms created by you and indicates levels and relationships that exist between them. Just like the tree view in the Catalogue database, this tree displays terms and their hierarchical links.
	Thesaurus search
	Cross reference search. Highlight a term in the current record and press this button; the resulting hit list will show records which contain the highlighted term in the same field.
	Stack hit list
	Backtrack/Recall stacked hit list
	Sort hit list
	Up a level – if using the hierarchy
	View first record in hit list
	View previous record in hit list
	Overview hit list (see page 5 for a description of the overview)
	Overview images
	View next record in hit list
	View last record in hit list
	Down a level – if using the hierarchy
	Zoom current field. If a field is too "short" for the information it contains you may find that information can be typed into the field, but it may not all be visible at once. In this case you can use this button to expand the field and display its contents.
	Hide/reveal empty fields
	Bulk insert field lists. Useful if you wish to add a group of blank fields to Catalogue records on a regular basis. First, add a list name using the 'Amend List Names' option from the 'Bulk Insert' option on the Administration Menu in Calm. Then add fields to the list using the 'Amend Field Lists' option from the same menu. When you press this button, names of field lists are shown and when you choose a list, fields that do not already exist on the record are automatically inserted.
	Save record/refresh screen (see page 6)
	Related works

Field Code Changed