

Calm v10

Importing from Spreadsheets



Online Calm Manual

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How to Read this Document

This is a task manual, which means that it is arranged around common tasks that you will likely want to perform in Calm. Many of these tasks will have been covered in the training that you received: the manual is designed to be a memory aid for the training, rather than comprehensively covering every scenario that may come up in Calm. For questions not answered in this document, please consult the online Calm manual or Calm helpdesk.

These notes will refer to the default, un-customised Calm 10.0.0, as it will look when you use it for the first time. Your version may differ.

Because this manual is meant to walk you through practice with Calm, example data is provided wherever it is. This data is in **yellow boxes**. This should allow you to practice entering data, but it is not recommended to use it in your organisation's live Calm system—only in a training system.

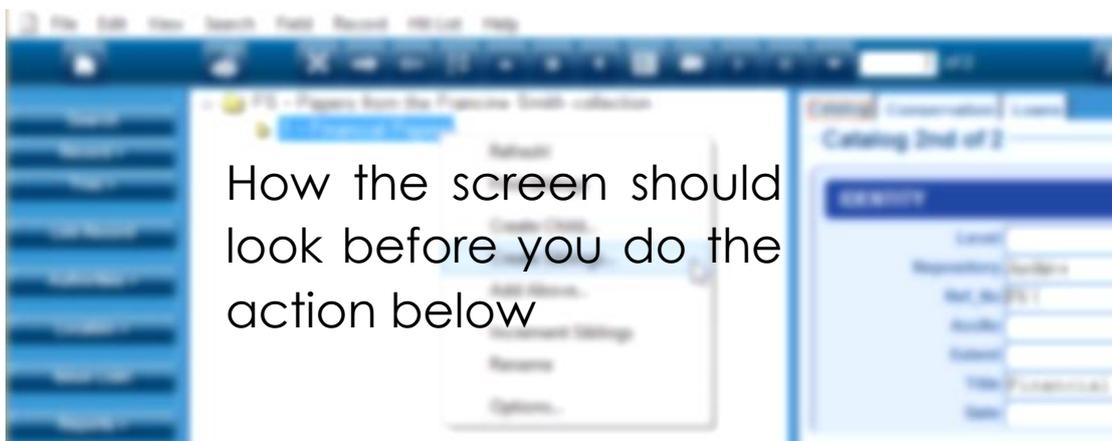
Calm is a feature-rich program, so there is often more than one way to perform a task or more than one command that will achieve the same result. For example, this manual mainly demonstrates ways to achieve tasks using mouse clicks and buttons on screen, but there are often keyboard shortcuts that can perform the same task. This manual is not intended to be an exhaustive listing of every method, but rather a guide to get you started.

The entries that follow are laid out as in a standard format:

The Task to Be Done

An explanation of what the task is or examples of when it would be useful.

Where to start:



- Actions you must do
- Events that happen automatically

Example data you can enter

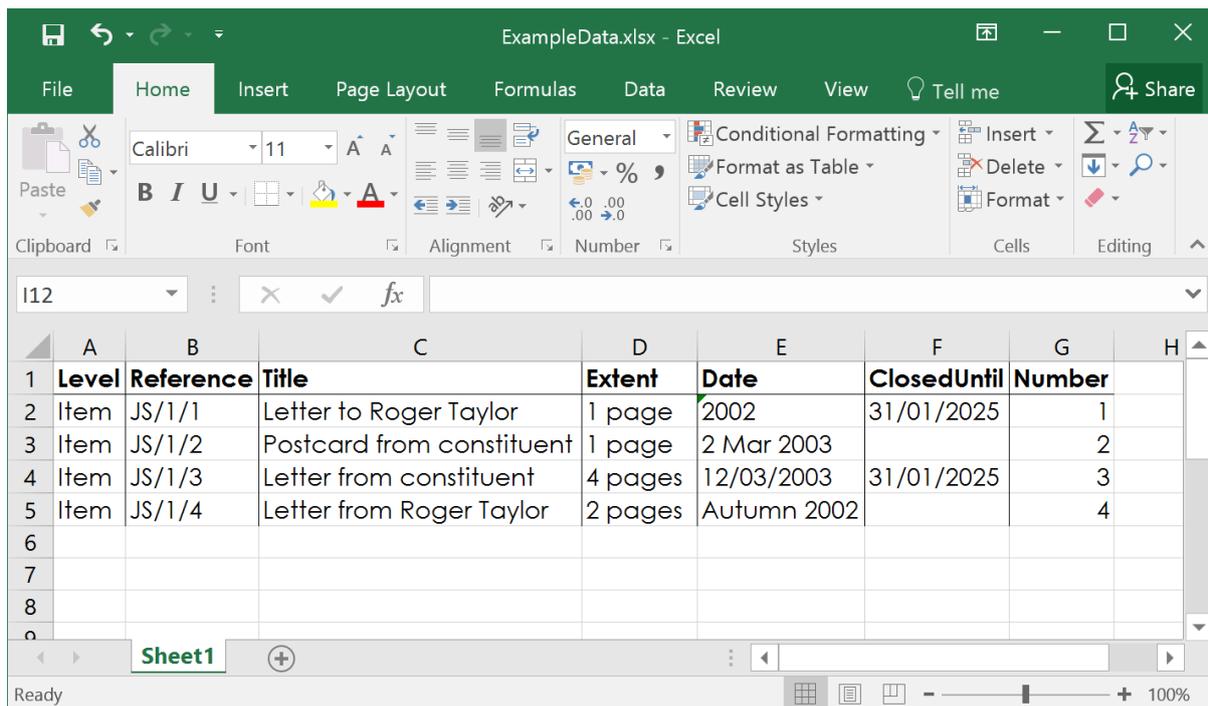


Information that may impact you in this task

Importing from Spreadsheets

The following three sub-sections ('To Create a Template to Map Your Data into', 'To Add the Spreadsheet Data to the Template', and 'To Import the Data into Calm') are the three parts of a process you can follow to import data from spreadsheets into Calm. The first time you follow them you will need to do each part, although in the future you can create a standard template as a .txt (plain text) file and use that, instead of re-creating the template each time. Using this process, you will create a plain text template that imitates Calm's DDescribe Natural format, put your spreadsheet data into it using Word's mail merge function, and then import the data into Calm.

As in the example below, spreadsheets that are suitable for import into Calm are those with a straightforward row/column layout, with column headings that can be equated with Calm field labels. Please note that column headings do not have to be the same as the Calm field labels. Each row in the table will become an individual Calm record. Each column should have the same type of data in it.



	A	B	C	D	E	F	G	H
1	Level	Reference	Title	Extent	Date	ClosedUntil	Number	
2	Item	JS/1/1	Letter to Roger Taylor	1 page	2002	31/01/2025	1	
3	Item	JS/1/2	Postcard from constituent	1 page	2 Mar 2003		2	
4	Item	JS/1/3	Letter from constituent	4 pages	12/03/2003	31/01/2025	3	
5	Item	JS/1/4	Letter from Roger Taylor	2 pages	Autumn 2002		4	
6								
7								
8								
9								

To avoid formatting problems when moving data out of a spreadsheet program, ensure that all of your columns are formatted as Text. It is best to do this before entering data into the spreadsheet.

Finally, this manual uses Microsoft® Excel 2016 and Microsoft® Word 2016 to demonstrate the mail merge process: other editions of the software may not work exactly the same as demonstrated here.

To Create a Template to Map Your Data into

In this example data is imported into an Archive **Component** record in the **Catalogue** database in Calm. To import into another database, follow the same process but create a template using the Calm record type you wish to import into instead of the Catalogue record type specified in this example.

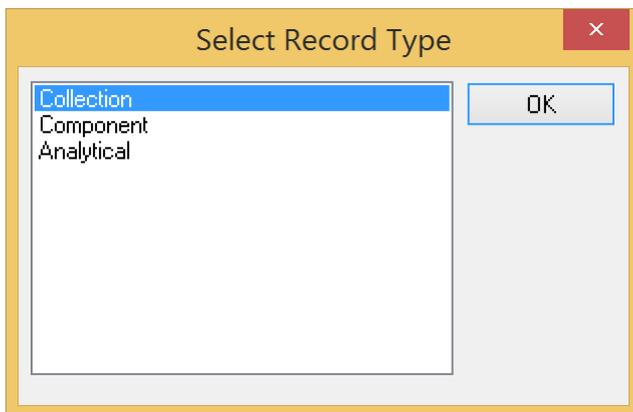
Start in Calm on the main menu:

- Open the module you wish to import data into
- Open the database you wish to import data into
- Click 

Archive

Catalogue

The **Select Record Type** dialogue box may appear

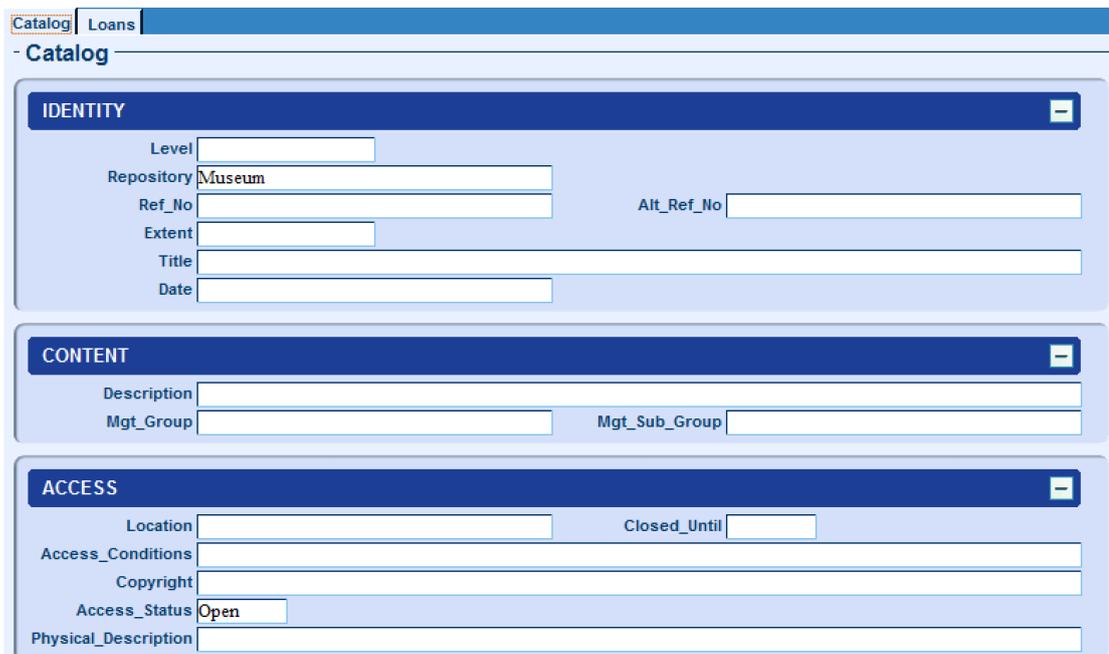


The dialog box titled "Select Record Type" has a close button (X) in the top right corner. It contains a list box with three options: "Collection", "Component", and "Analytical". The "Collection" option is currently selected and highlighted in blue. To the right of the list box is an "OK" button.

- Click the type of record you wish to import
- Click 

Component

A new blank record will be created

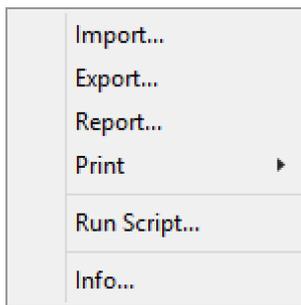


The screenshot shows the "Catalogue" record form in Calm. The form is divided into three main sections: "IDENTITY", "CONTENT", and "ACCESS".

- IDENTITY**: Includes fields for Level, Repository (set to "Museum"), Ref_No, Extent, Title, Date, and Alt_Ref_No.
- CONTENT**: Includes fields for Description, Mgt_Group, and Mgt_Sub_Group.
- ACCESS**: Includes fields for Location, Closed_Until, Access_Conditions, Copyright, Access_Status (set to "Open"), and Physical_Description.

- Delete any text from the record that you don't wish to appear on the records you import

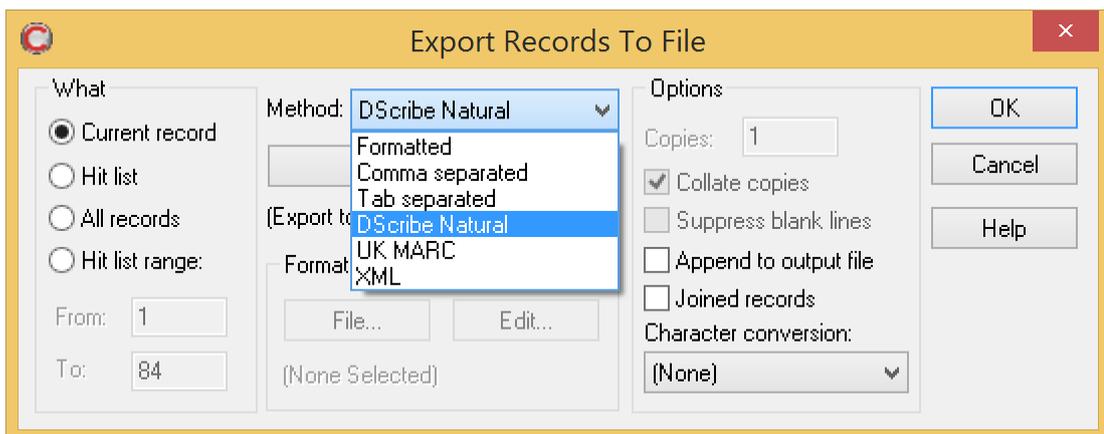
- Click **File** on the menu bar
The following menu will appear



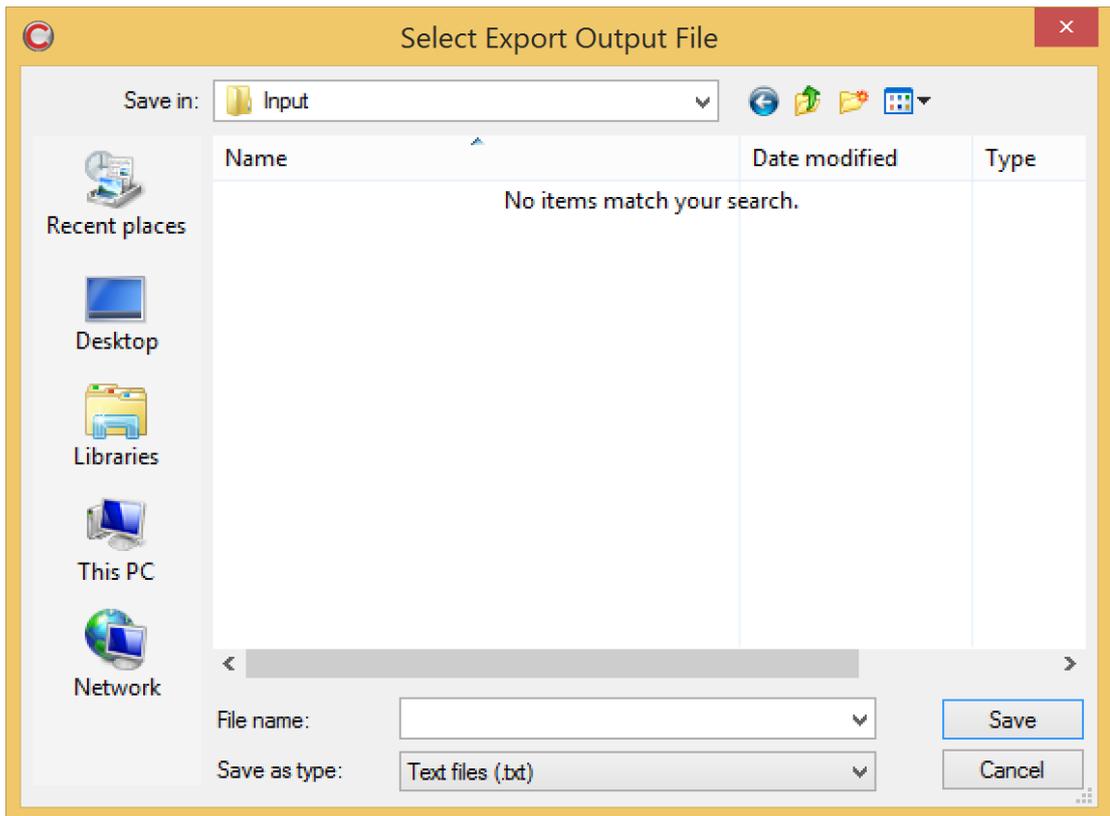
- Click **Export...**
The **Export Records To File** dialogue box will appear



- Click the radio button (●) next to **Current record**
- Click the down arrow (▼) at the right of the 'Method' field
A drop-down menu will open



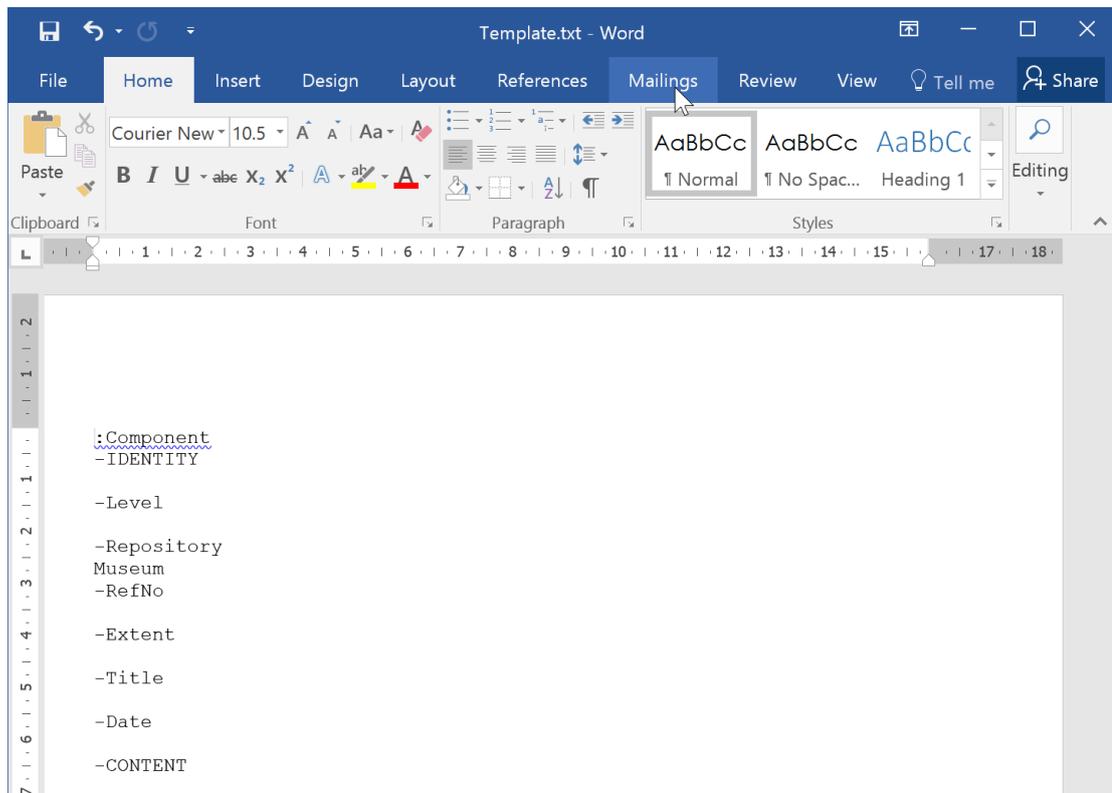
- Click 'DDescribe Natural'
- Click  **To file...**
The **Select Export Output File** dialogue box will appear



- Choose a save location in your default Calm folder C:\dscribe\Archive\Input
- Enter a name for the template Template
- Click the down arrow (▼) at the right of the 'Save as type:' field
A drop-down menu will open
- Click 'Text files (.txt)'
- Click Save
- Click OK
The blank record will be exported

To Add the Spreadsheet Data to the Template

Start in Word with the file you just exported open:



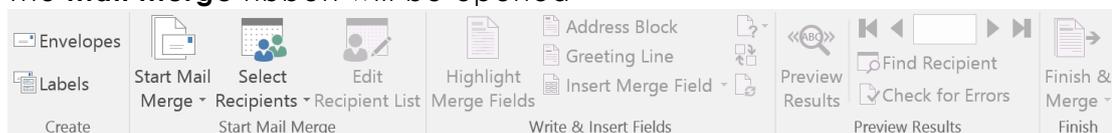
The record type will be displayed after a colon (:), the field labels will be displayed after hyphens (-), and content for each field will be displayed on the line below the field label

- Delete the field label '-RecordID' and its contents from the template

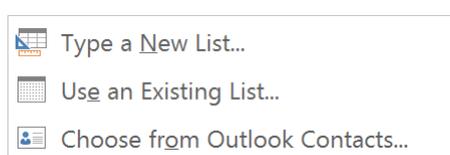


If you do not delete this field, the records can still be imported into Calm but they will cause serious errors only the helpdesk can fix.

- Click the **Mailings** tab on the ribbon at top
The **Mail Merge** ribbon will be opened

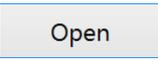


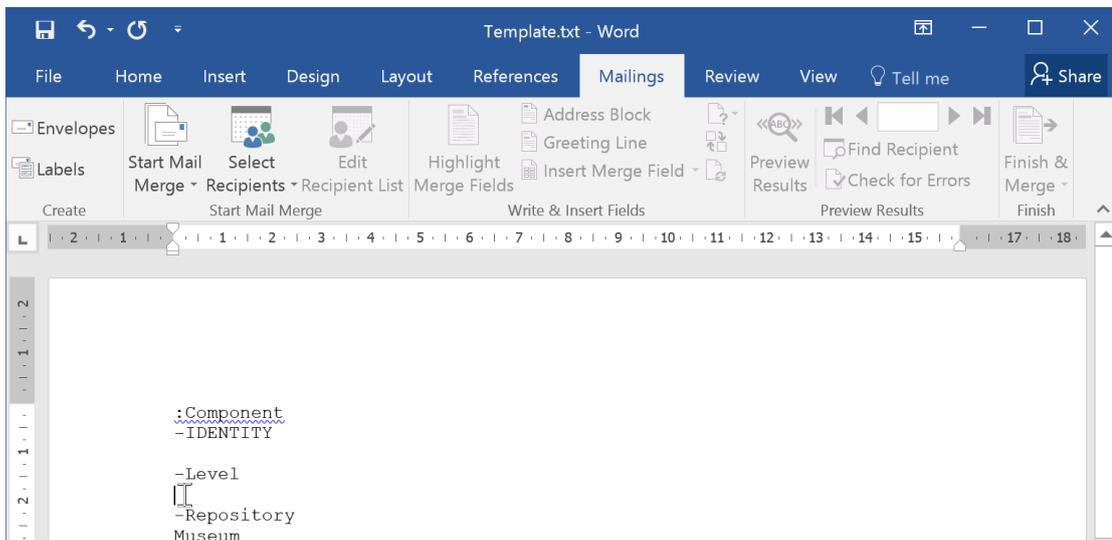
- Click **Recipients** ▾
A drop-down menu will appear



- Click **Use an Existing List...**

- Navigate to the spreadsheet with the data you wish to import

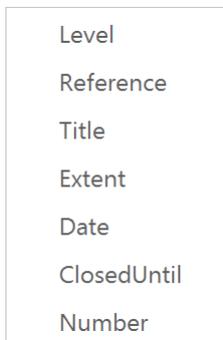
- Click 

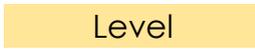


- Click below the label of the first field you wish to add data to 



- Click  A drop-down menu will appear showing the headings from the spreadsheet



- Click the spreadsheet heading you wish to connect to the Calm field 

The spreadsheet heading will appear in double angle brackets («») below the field label

-Level
«Level»

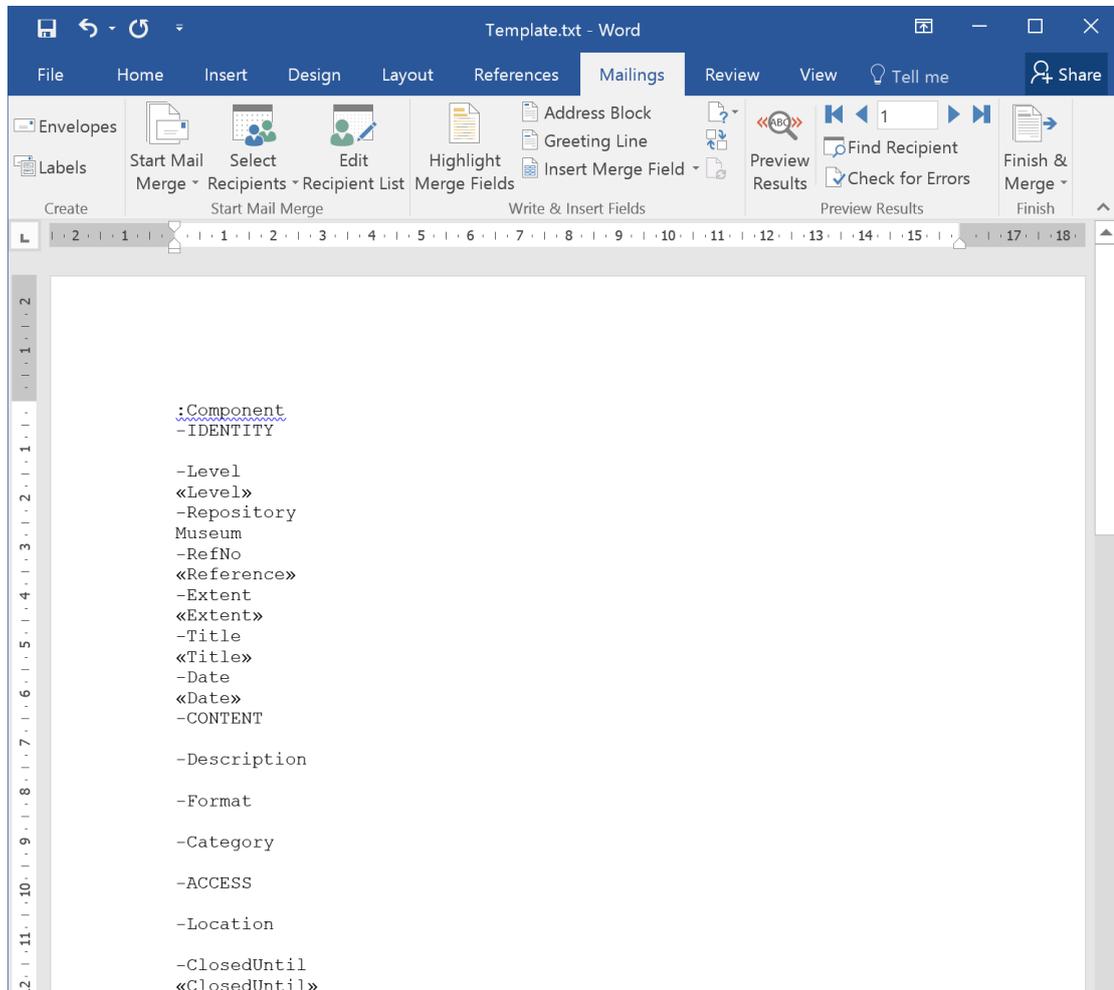
- Enter the rest of the spreadsheet headings you wish to add below the field labels you wish to import them into



If you do not enter data into a mandatory field, or enter data not on the list into a picklist field, it will still be imported but you will receive validation warnings every time you save or edit the records you create.



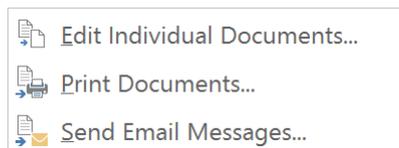
It is advisable to insert a unique number (such as in the column 'Number' in the table above) into the RCN (hidden) field when importing catalogue records. This number may be required by Calm later (please contact the Calm helpdesk or see the online manual for more information on the RCN field).



Finish &

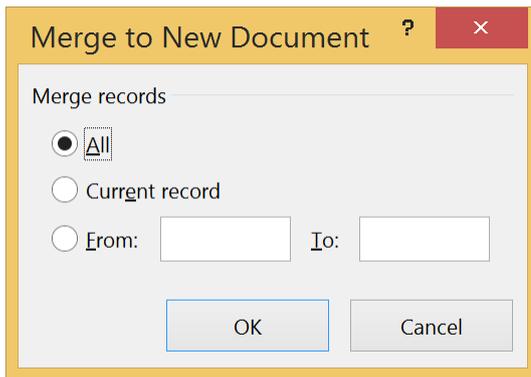
- Click Merge ▾

A drop-down menu will appear



- Click  Edit Individual Documents...

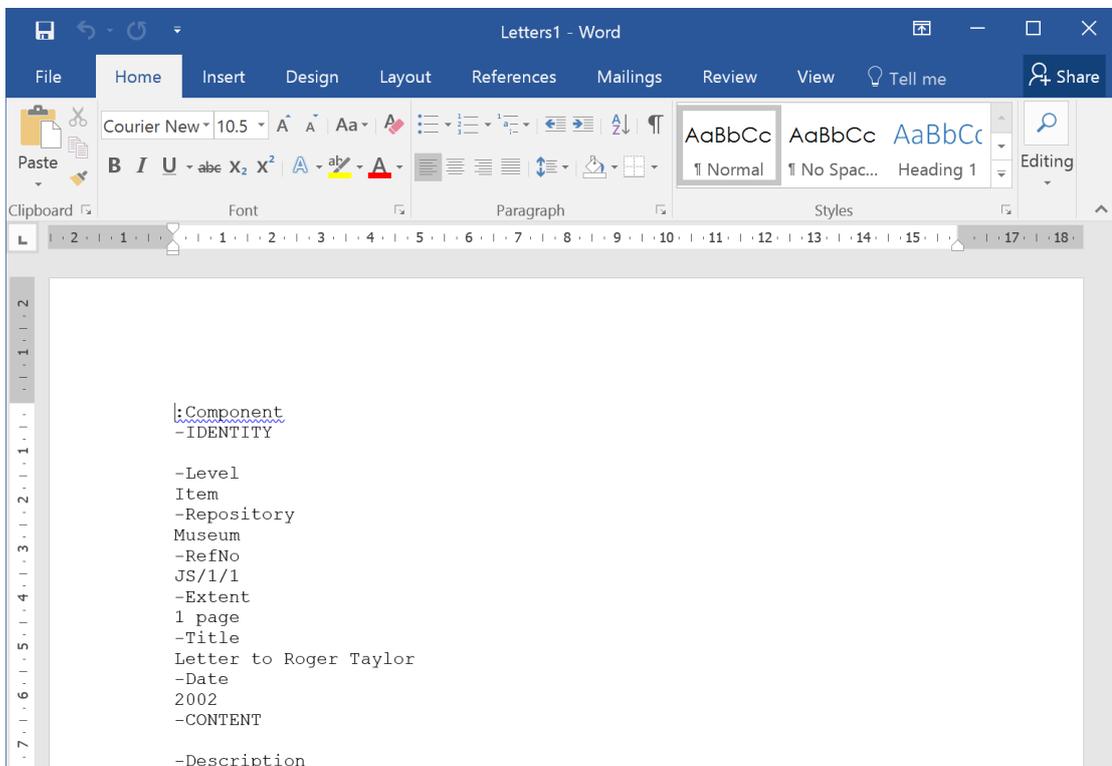
The **Merge to New Document** dialogue box will appear



➤ Click the radio button (●) next to **All**

➤ Click 

A new document will appear, in which the data will be added to the template to create multiple 'records', one for each row in the spreadsheet

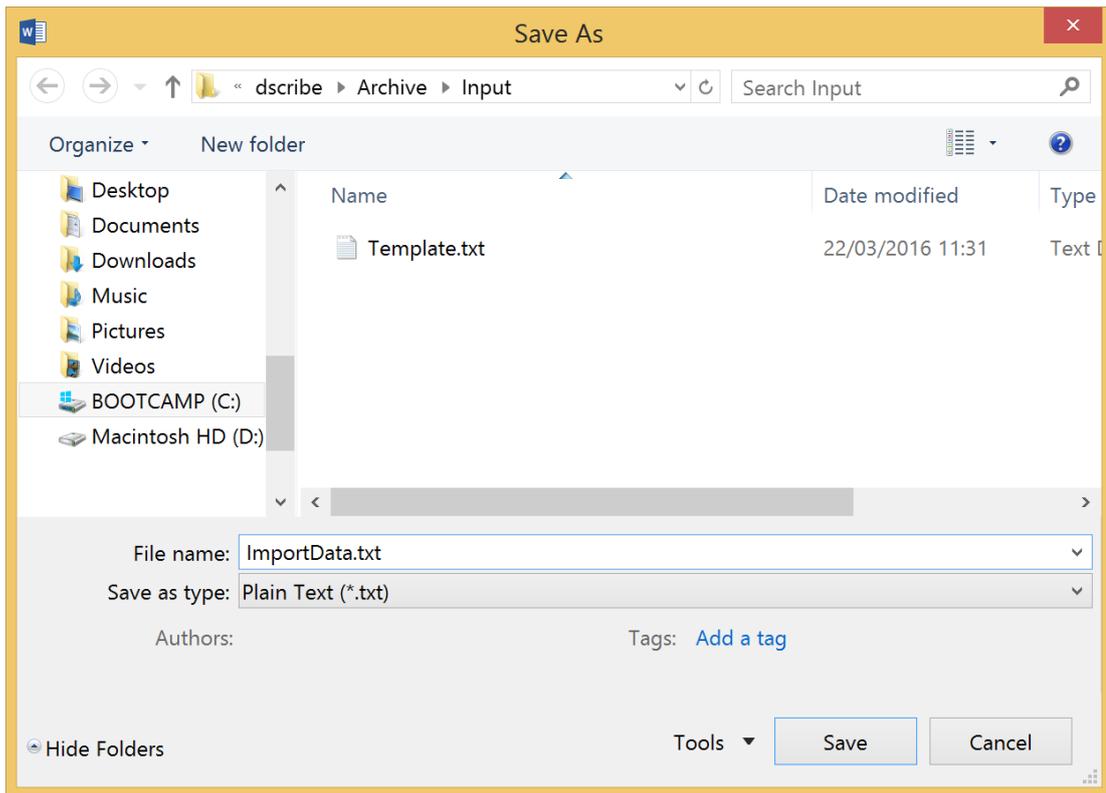


➤ Click 

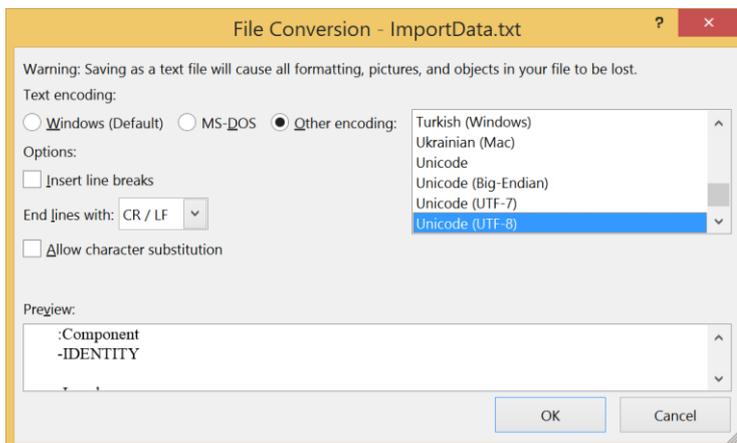
➤ Click 

➤ Click 

The **Save As** dialogue box will appear



- Choose a save location in your default Calm folder C:\dscribe\Archive\Input
 - Enter a name for the records to import ImportData
 - Click the down arrow (▼) at the right of the 'Save as type:' field
A drop-down menu will open
 - Click 'Plain Text (.txt)'
 - Click Save
- The **File Conversion** dialogue box may appear

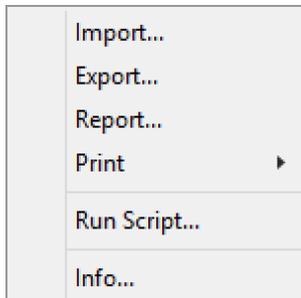


- Click OK
- Click ✕ in the upper-right corner
The .txt file you wish to import will be closed

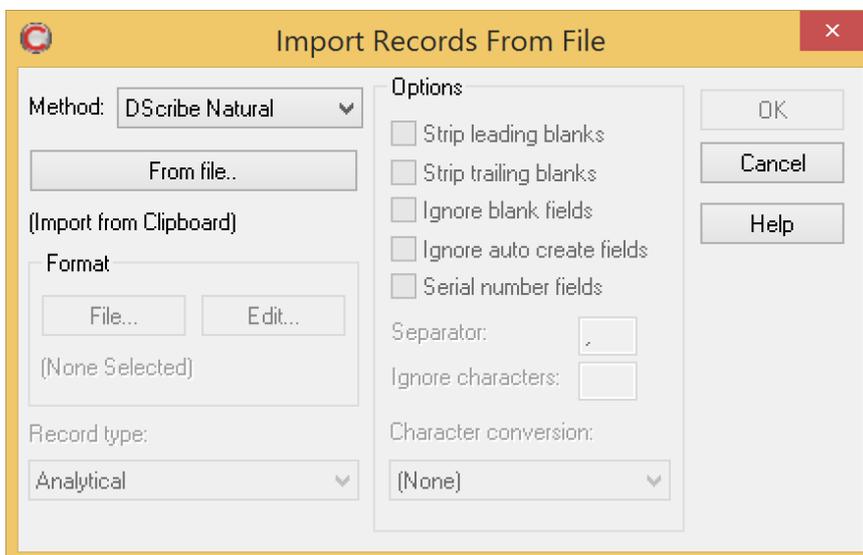
To Import the Data into Calm

Start in Calm on a record in the database you wish to import data into:

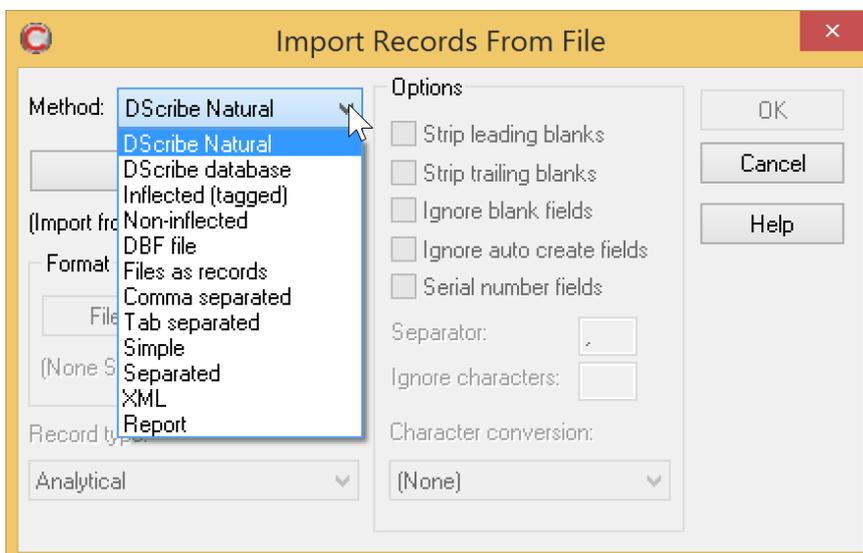
- Click **File** on the menu bar
The following menu will appear



- Click **Import...**
The **Import Records from File** dialogue box will appear



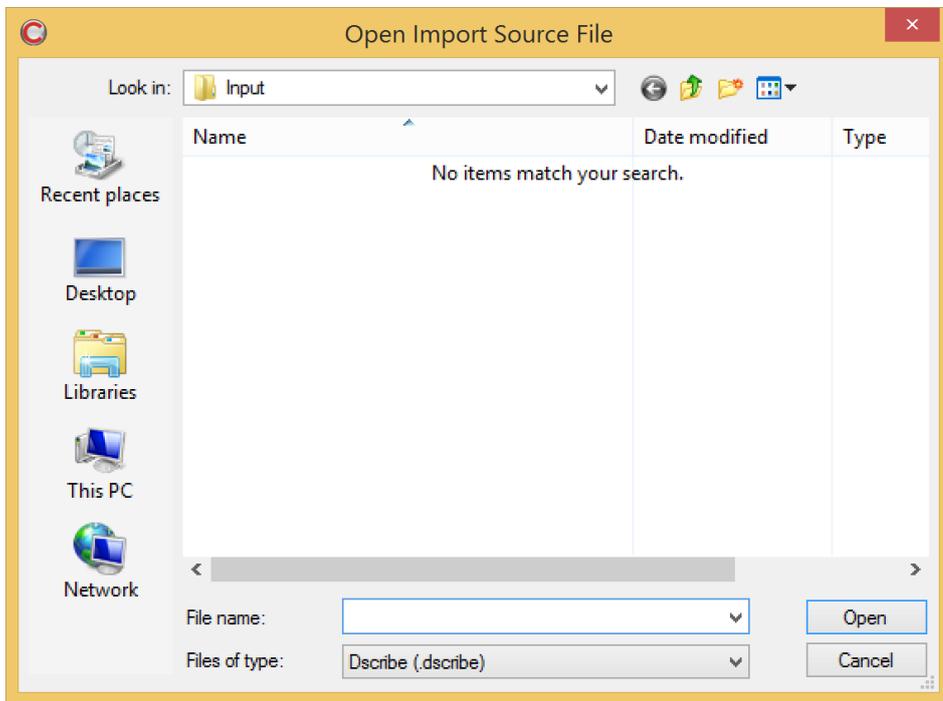
- Click the down arrow (▼) at the right of the 'Method' field
A drop-down menu will open



- Click 'DDescribe Natural'

- Click 

The **Open Import Source File** dialogue box will appear



- Navigate to where you saved the .txt file C:\dscribe\Archive\Input you wish to import

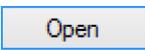
- Click the down arrow (▼) at the right of the 'Files of type:' field
A drop-down menu will open

- Click 'Text files (.txt)'
The .txt file you wish to import will appear

- Click the .txt file you wish to import ImportData



Be sure to select the merged data .txt file, not your original template file.

- Click 

- Click 

The records will be imported into the database you had open

