



Calm for Archives

Introductory Guide
for
New Users

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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 Accession 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 Collection and Component 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:

Accessions	The recording of new gifts or deposits and the retrospective entry of old accessions. See page 11 for details.
Catalogue	The main source of information about archive material held. See page 15 for details.
Depositors	Holds contact data of Depositors and Intermediary Bodies. Links to the Accessions database. See page 10 for details.
Authority Files	Sources of information on standard terminology, for example, personal names frequently referred to.
Locations	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.
Images	Records technical metadata about your digital images, including thumbnails of each image.
Loan History	Records loans (material issued for more than one day) and productions (material issued for less than a day, i.e. to researchers in the reading room). This database stores records about current loans, previously returned loans as well as loans yet to be issued. For productions or document ordering, an immediate or future order/booking can be entered in this database. Retrieval lists can be produced and it is easy to overview productions that have been booked for today. Catalogue records can contain a 'Lead Days' field. This is the notice required (in number of days) to produce that particular catalogue item, for example, if it is kept in an out store. The Loans module uses this Catalogue field when determining the start date for a loan.

Resources	<p>This database links to Productions, it stores details of the resources required for Productions i.e. any items of equipment needed in order to view/use a Catalogue item, for example a microfilm reader or map table.</p> <p>If a resource is required, add a 'Resource' field to the Catalogue record for that item. When a Production is booked, a member of staff needs to check that the relevant resource(s) is also available for the same period.</p>
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/Productions databases.</p>

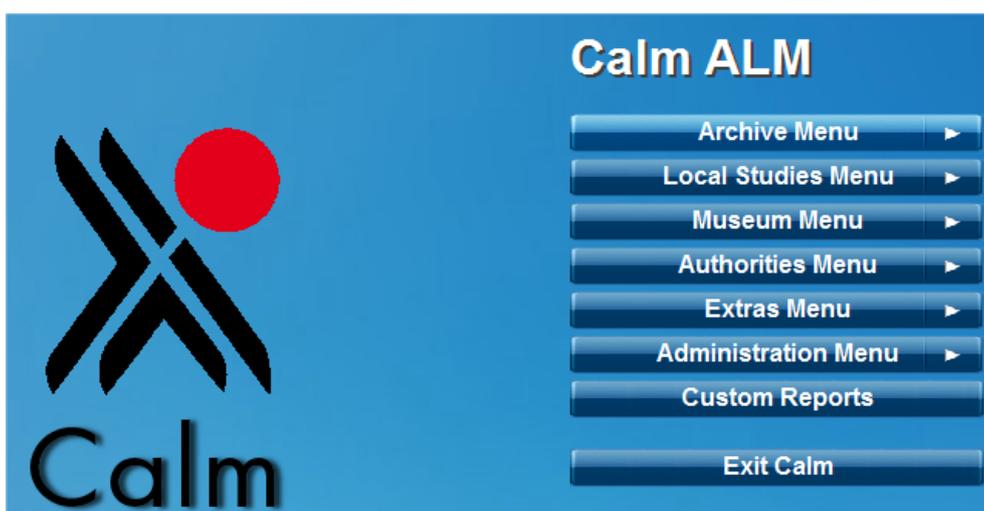
Finding Your Way Around Calm

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

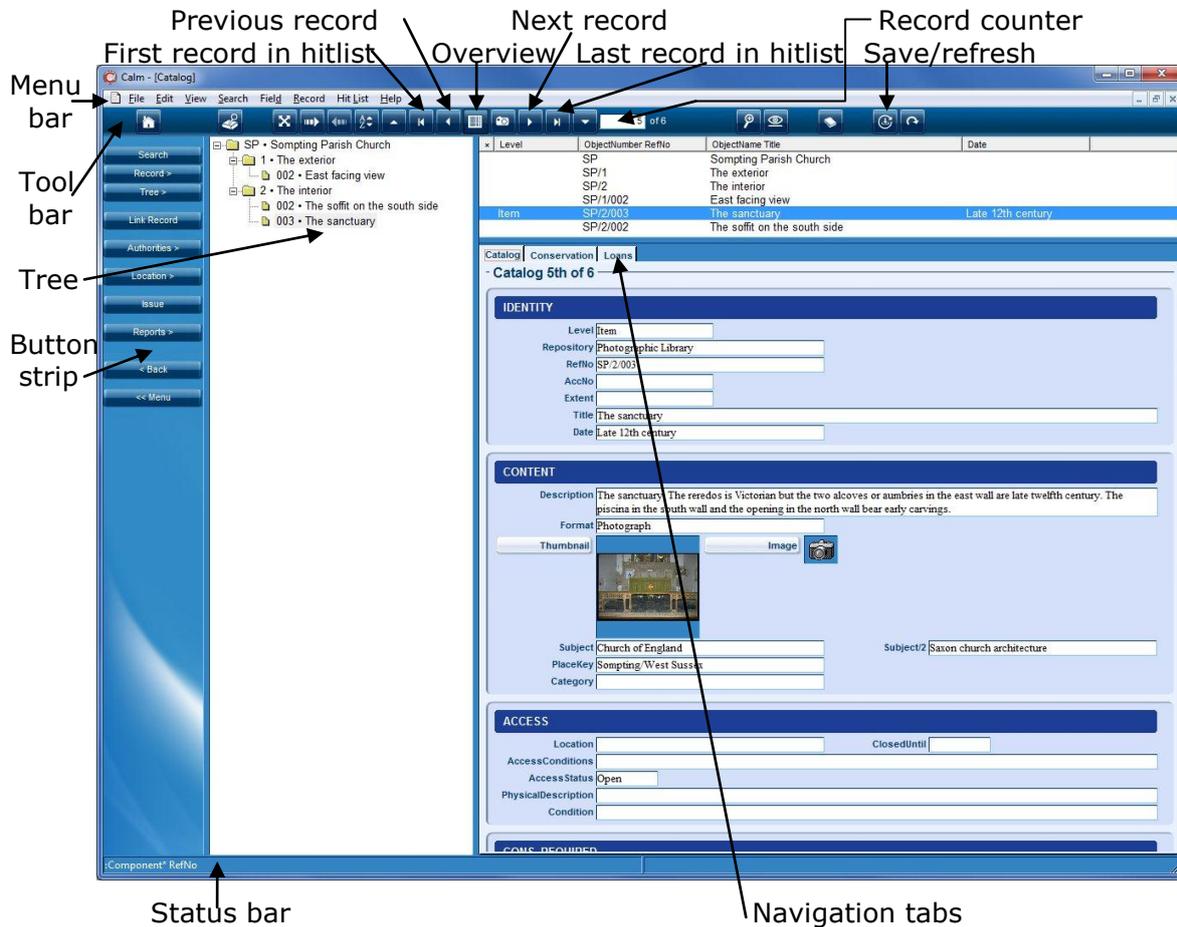
Calm opens with the main menu displayed, as shown:



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 RefNo 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

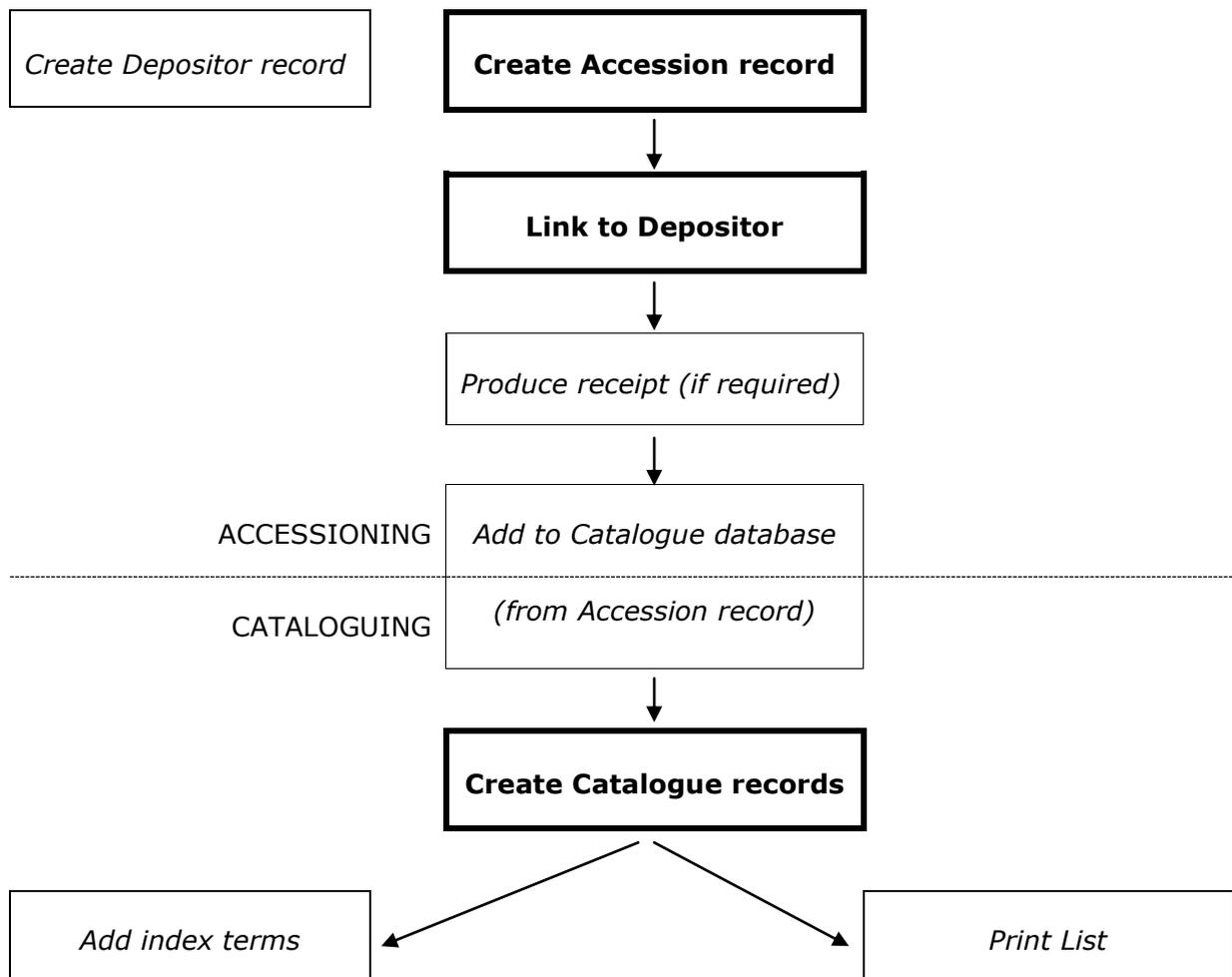
Various fields in Calm have a 'picklist' attached to them. They enable you to improve consistency and make searching more efficient by encouraging and enforcing the use of valid terms only (in fields for which picklists have been set). To add, remove or edit picklists; run Calm Admin, open the relevant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

Workflow for Accessioning 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 accessioning or cataloguing.

Italics indicate optional tasks, depending on particular circumstances.



Accessions and Depositors

Creating a Depositor record

From the Main Menu, select Archive Menu, then the Depositors Menu. 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 Accessions 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 Accessions 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 Accessions 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 Accessions database.

Creating an Accession record

From the Main Menu, select Archive Menu, then the Accessions Menu. Create a new record and complete it with basic information about the material as described below.

Calm operates on the assumption that at this stage the material is accessioned as a whole collection and later in the Catalogue database it will be broken down into its component parts. The most important things to do at the accession stage are to assign a unique accession number (AccNo field) and a title (Title field). The title will be one that refers to the whole group of material, for example "The Smith Family Collection".

Below is an introduction to key fields in the Accessions database. 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 Accession record to function properly within Calm.

IDENTITY

AccNo	Do not delete this field as it is required by the Calm system. Enter the accession number for this accession. A rolling accession number can be set up in Calm Admin. If this has been done, place your cursor in the AccNo field and press the Insert key on your keyboard for the next number; alternatively you may enter the number manually. The accession number may be compiled of letters and numbers, but must be unique, as Calm will use the AccNo field to identify the record and link it to records in the Catalogue database.
Repository	Enter your repository name here. Alternatively use Calm Admin to set default text for this field.
AccessionCategory	Double click in the field to bring up a picklist of possible categories, click on the appropriate category to select, press return or click on another field to close the picklist. The picklist can be amended with your own terms using Calm Admin. If you enter a term not on the picklist, Calm will issue a warning when you try to save the record.
Title	Enter a brief title for the accession.
Date	Covering dates of the records.
Description	For further information about the content of the accession, if required.

CONTENT

Extent	Volume or quantity of the accession, e.g. 12 boxes.
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ACCESS

AccessStatus	Choose 'Open' or 'Closed' to show whether this accession is available or closed to researchers.
ClosedUntil	Enter a date, in the format dd/mm/yyyy.
AccessConditions	Any restrictions that affect access to and use of this accession.

CONTEXT

Priority	Cataloguing priority, optional.
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DEPOSIT

AcqTerms	Terms on which material has been transferred to the archive.
DepositNo	Optional.
DepositDate	Enter the date the accession was received. Please note: This field only appears once the Accession record is linked to a Depositor record. If the record is not going to be linked to a Depositor, please use 'Insert' on the Field drop-down menu to add it.
ReceiptDate	When you use Calm to generate a receipt for the depositor (see page 14), this field is automatically filled with the current date.
ListDate	Do not delete this field as it is required by the Calm system. When you add this Accession record to the Catalogue database (see page 20), this field is automatically filled with the current date.
FundAmount	This is a currency field.

Linking a Depositor record to an Accession record

This illustrates a link between the Depositor and the material they have deposited.

The details of the process are shown below, but generally records in Calm are linked in this way; from the core record (Accession 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 may be added to each record, however more than one intermediary may be linked to an Accession Record.

With the Accession 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 Accession record.

Producing Receipts for Depositors

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

- Search for the Accession record(s) you wish to print a receipt/receipts for.
- Click the 'Reports' button in the side button strip, followed by the 'Print 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.
- When you run this report, today's date will automatically be inserted into the ReceiptDate field of each Accession record in the hit list. Any records in the hit list that already contain a ReceiptDate will have it overwritten by today's date.
- Print as required using the normal Microsoft Word functions.

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/Productions, Conservation and Locations databases, you need to create a Catalogue record for each unit that you wish to manage.

In archival terms the most important record types in the catalogue are Collection and Component, which are used to represent levels in a collection by creating groups of records in a hierarchical structure. The Collection record type is designed to catalogue groups of records at the highest level. Component records are designed to catalogue individual items or smaller groups of material such as sections or series within a collection. EAD (Encoded Archival Description) uses Collection as a top level record and Component for the other levels.

The fields in the record types are grouped into blocks and conform to the International Standard Archival Description (General) (ISAD(G)).

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 RefNo field, it uses forward slashes (/) to represent a new level in the hierarchy.

Entering Catalogue data

There are five ways:

- Writing a completely new record
- Modifying an existing record to make a new one
- Using the add below function
- Transferring information from an Accession record
- Importing (e.g. from Microsoft Word, Microsoft Excel or EAD files)

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

Creating a new Catalogue record

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

Below is an introduction to key fields in the Collection and Component record templates in the Catalogue database. We have highlighted fields that interact with other databases, are used by the Calm system or relate to ISAD(G), but generally it is up to you to decide what information to enter into which fields.

The fields listed below appear in the Collection or Component record types 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

Level	<p>This field has a pick-list indicating the level represented by the current record.</p> <p>Calm is flexible over which elements you use, different countries have local equivalents.</p> <p>Relates to ISAD(G) section 3.1.4</p>
Repository	<p>Select an entry from the picklist or enter if items are held elsewhere.</p> <p>Alternatively use Calm Admin to set default text for this field. This field is used for data exchange; it is required for Europeana and the UK Archives Hub.</p>
RefNo	<p>Do not delete this field as it is required by the Calm system. A unique identifier for the collection or component 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 archival tree hierarchy; it is built from the first element that you enter in the RefNo.</p> <p>WARNING! Do not use brackets or other symbols in this field (except forward slashes to denote a new level in the hierarchy and hyphens) as they can cause severe disruption.</p> <p>If used by your organisation as a unique reference number for the catalogued material, this relates to ISAD(G) section 3.1.1</p>
AltRefNo	<p>The reference by which the item is identified, stored and produced. Enter a number or combination of letters and numbers. This may or may not be the same as the RefNo described above. If your existing reference numbering system does not indicate hierarchical levels (and therefore can't be used in Calm to base the tree structure on) we recommend that you use this field for your existing system and create a new numbering system for the RefNo field.</p> <p>If used by your organisation as a unique reference number for the catalogued material, this relates to ISAD(G) section 3.1.1</p>
AccNo	<p>Do not delete this field as it is required by the Calm system. The accession number of the collection.</p> <p>This field creates a link to the Calm Accession record. Can be used to record accession number at lower than collection level where appropriate.</p>
Extent	Relates to ISAD(G) section 3.1.5
Title	<p>The name by which the collection or component is to be known. This is shown in the hierarchical tree in Calm and also Calmview.</p> <p>Relates to ISAD(G) section 3.1.2</p>
Date	<p>Covering dates of the collection as a whole or the exact date of a piece.</p> <p>Dates must be entered in a valid format to ensure that they can be interpreted correctly when searching on this field.</p> <p>Relates to ISAD(G) section 3.1.3</p>

CONTENT

Description	Summary description of the record, where the title alone is not adequate. Relates to ISAD(G) section 3.3.1
MgtGroup	The management group, or broad type of archive, which the collection falls into; choose from the picklist provided.
MgtSubGroup	Management sub-group: use only when required, choosing from the pick-list provided.
Format	Likely to be used at series level and below. Select from the picklist provided if appropriate.
LeadDays	This is the number of days' notice required to produce this item for a loan or production, for example, if it is kept in an out store. When Calm calculates possible start dates for loans and productions, any value you enter here is taken into account (along with days that the archive is closed).
Resource	This field doesn't appear in the record template by default, so you will need to add it using 'Insert' on the Field drop-down menu, if required. Enter the name of any resource needed in order to view/use this item on a Production, for example a microfilm reader or map table. The Resources database stores a list of all available resources. When a production is booked for this item, the contents of this field will indicate to a member of staff that a resource is required and they should check that the resource is available for the Production period entered.
Category	Specific types of documents which searchers may wish to look for; picklist provided.

ACCESS

Location	Information to help locate the item within the Repository. If you use Calm to link a Location record to this Catalogue record, the LocationRef from the Location record will automatically be shown here.
ClosedUntil	Do not delete this field as it is required by the Calm system. Precise date when closed records will be open for research, in the format dd/mm/yyyy. Relates to ISAD(G) section 3.4.1
AccessConditions	Any restrictions placed by the depositor, your archives or current legislation should be noted here. Relates to ISAD(G) section 3.4.1
Copyright	Information about copyright, especially where this is owned by an identifiable person or body who is NOT the depositor. Relates to ISAD(G) section 3.4.2
AccessStatus	Do not delete this field as it is required by the Calm system. Choose 'Open' or 'Closed' from the picklist to show whether you wish this record to be viewed by the public or not, via Calmview. You can use Calm Admin to set a default for this field.

PhysicalDescription	Information about the physical condition of the item. Relates to ISAD(G) section 3.4.4
Condition	Choose from the picklist, as appropriate. This field is 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.

CONTEXT

AdminHistory	Information about the origins, history and responsibilities of the body that created the records. Relates to ISAD(G) section 3.2.2
CustodialHistory	Information about the successive ownership of the collection or the means by which it reached the depositor and/or your archives. Relates to ISAD(G) section 3.2.3

CONS REQUIRED

ConservationPriority	Do not delete this field as it is required by the Calm system. Choose from the picklist. This field is used by the Conservation module in Calm so the Conservator(s) can select which records are transferred for conservation.
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ALLIED MATERIALS

RelatedMaterial	Information about (cross-references to) items in other collections (either at your archives or externally) closely related in context. Relates to ISAD(G) section 3.5.3
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CATALOGUE STATUS

CatalogueStatus	Initially choose 'Draft' from the picklist. When work is completed, switch this to 'Catalogued' if you wish the record to be accessed by Calmview and shown to the public.
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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. If you want to create a very similar entry, select 'Clone'. This makes an identical copy, complete with all data except the RefNo which you will need to allocate. If you want only certain fields (Level, Repository, RefNo, AltRefNo and Title) to be the same, select 'Copy'. This creates a new record prompting you to complete the final element of the RefNo.

Add Below

From the Catalogue Menu, select Search and find the record that you wish to add child records to. Select 'Record >' on the side button strip, followed by 'Add Below'. Select the record type for the new child records to be created.

A dialogue box will appear, an example is shown below:

Complete with a unique number for the first child record. Each child record will be given the same RefNo as its "parent" record followed by a forward slash (/) and a sequential number starting with the unique number you have entered. For example, if you enter 1 in this box, this first new child record will contain existing RefNo/1 as its RefNo.

Entries here are copied to the appropriate fields in the newly created child record(s).

Please note: Title is mandatory at this stage, so do not leave it blank, you can edit it later.

These fields provide you with the opportunity to add common, additional data to each child record created. In this example, (Extent has been chosen from the drop-down list) an Extent field containing the words '1 item' will be added to each child record created by the Add Below process. You can do this for up to three fields, but please note that the fields you choose MUST exist on the default record template you have chosen for the child records.

Transferring information from an Accession record

In the Accessions database, search for the entry to be transferred to the Catalogue. Select 'Add to Catalogue' in the side button strip. You will be asked whether you wish to create a new collection or link to an existing collection. This process copies over the AccNo field which provides a link between the Accession and Catalogue records.

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	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	RefNo	These fields are used to generate the hierarchical tree view
Period	Date	A narrative date field, this has good flexibility with a wide variety of formats available
Date	ClosedUntil	A more simple date format; dd/mm/yyyy
Number		Numbers with decimal places
Integer	LeadDays	Whole numbers, such as account numbers
Currency		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:

	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
	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
	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