

Axiell Collections for Calm

Quick Start Guide

Axiell ALM Ltd.

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Introduction to Axiell Collections

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

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

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

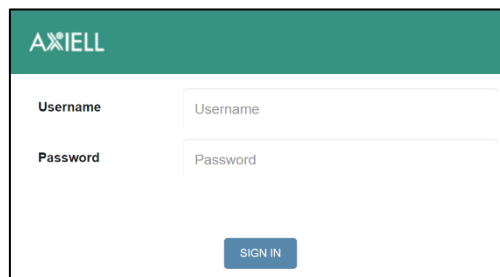
⚠ *This guide is for the default version of Collections—your organisation may have different fields or databases.*


Start Collections

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

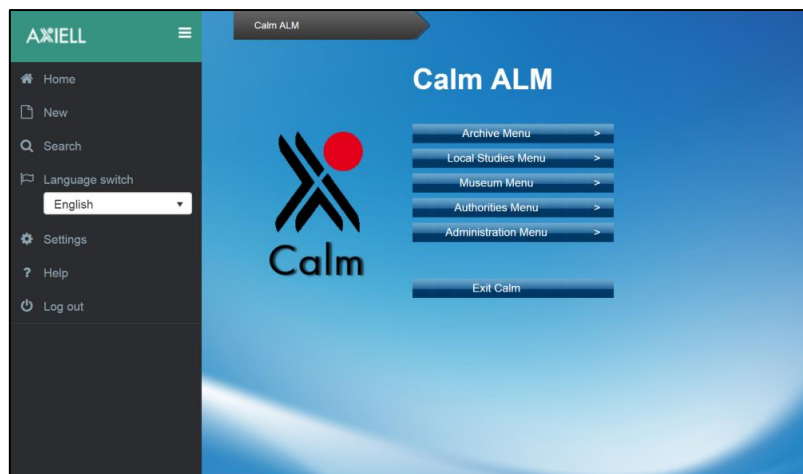
1. Open your internet browser
2. Go to the site where your organisation's copy of Collections is

A dialogue box will ask you to log in to Collections






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

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



The Main Menu

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

	Minimise the <u>main menu</u> to display only the icons.
	Close the <u>database</u> you are in and return to the <u>main menu</u> .
	Create a new record in a <u>database</u> of your choice.
	Look for records in a <u>database</u> of your choice.
	Change the language Collections uses to display options (but not the language you use to enter data).
	Return settings back to default
	Open the Collections Web Help in a new internet browser tab.
	Log out of Collections.

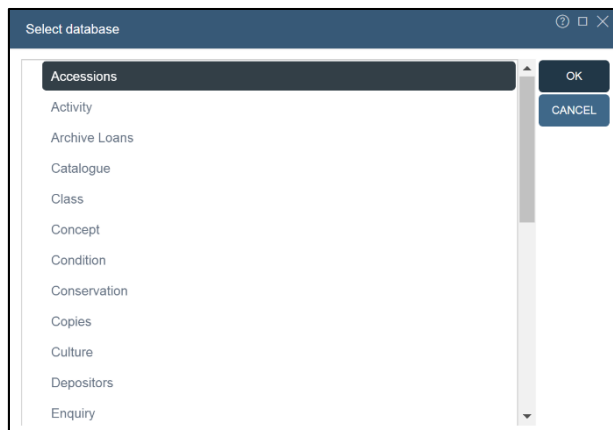
Create a Record

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

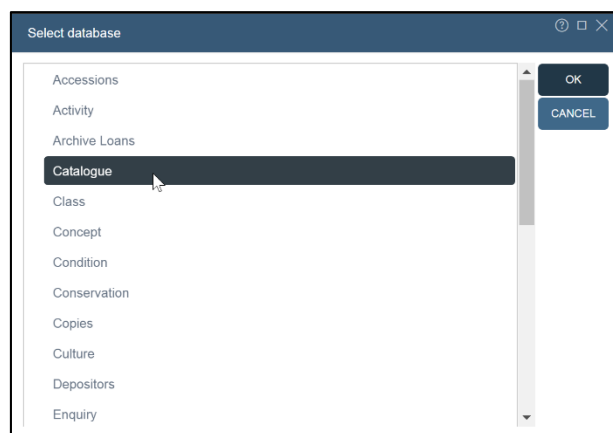
Start anywhere in Collections:

1. Click  **New** on the main menu

A dialogue box will ask you to choose which database you want to create a record in

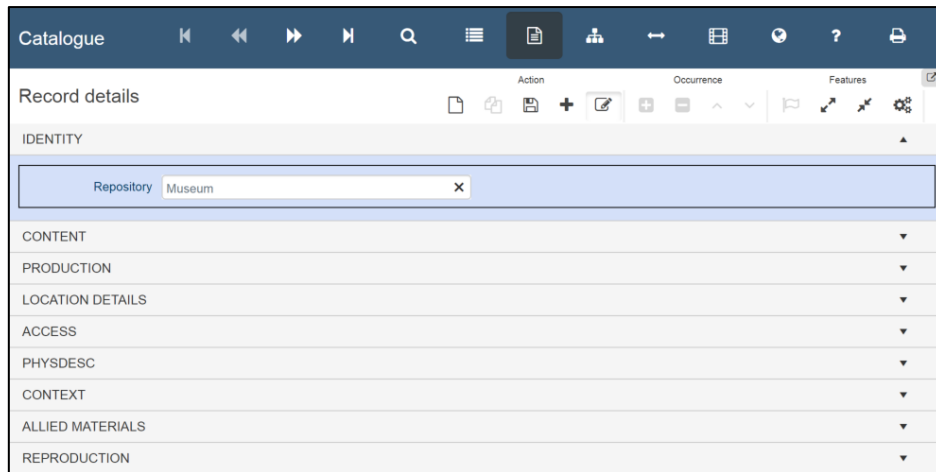


2. Click the name of the database you want to create a record in



3. Click 

A new record will be created in edit mode




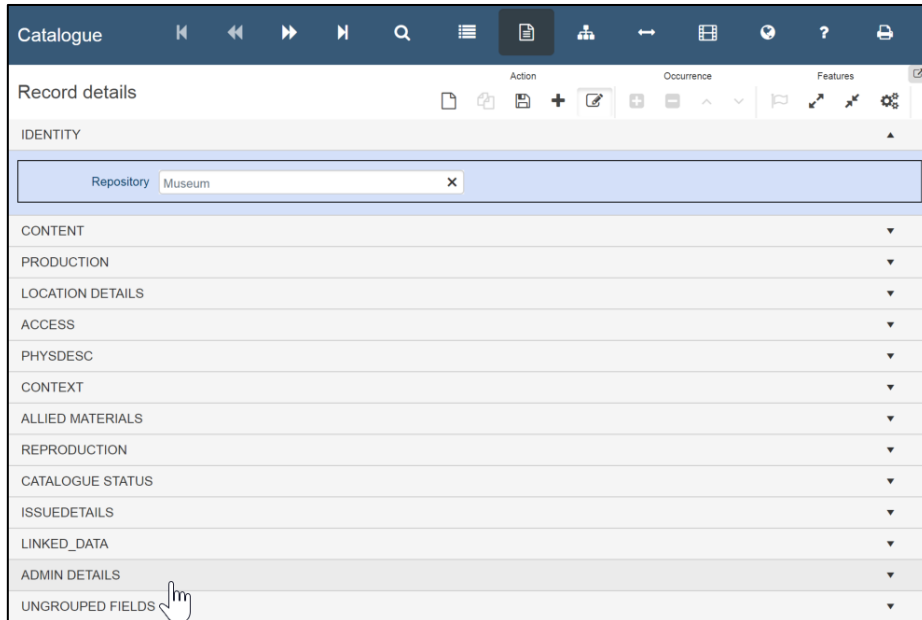
Databases

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

Give a Record a Type

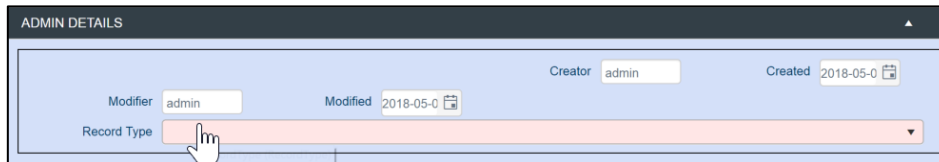
You've made a record now, but it probably doesn't have many fields on it. You need to give it a record type so Collections knows which fields it needs. We'll use Collection, which is for collection- or fonds-level archival records.

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



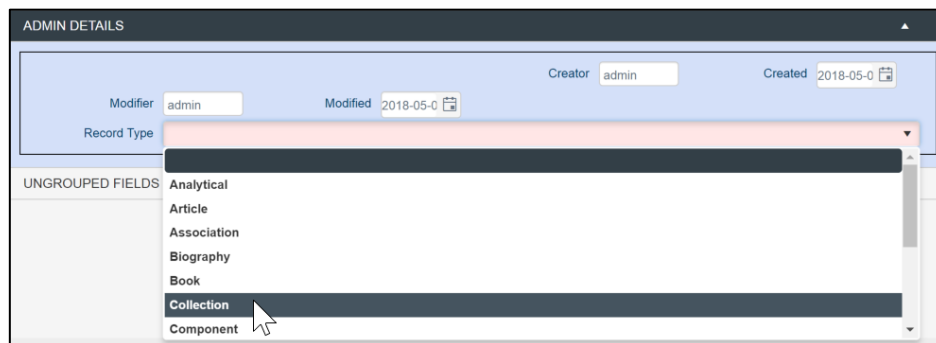
1. If there are no fields visible under ADMIN DETAILS, click ADMIN DETAILS

The ADMIN DETAILS fields will appear



2. Click in the Record Type field

Collections will display a list of available record types



3. Click the record type you would like to use

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

Catalogue

Record details

IDENTITY

Level

Repository

Ref No

Alt Ref No

Extent

Title

Date

CONTENT

PRODUCTION


LOCATION DETAILS

ACCESS

Record Types

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

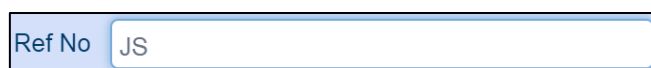
Edit a Record

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

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



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










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

Object number JS
Description The Jane Smith Collection

Fields

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

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

Save a Record

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

Start on a record that is open in edit mode:

1. Click 

Changes you have made to the record will be saved and it will now be in display mode

Edit Mode and Display Mode

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

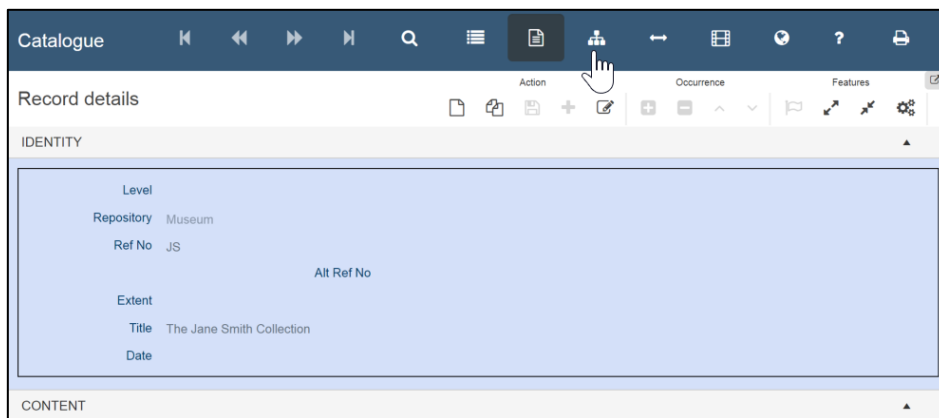
A field in edit mode: Ref No

The same field in display mode: Ref No JS

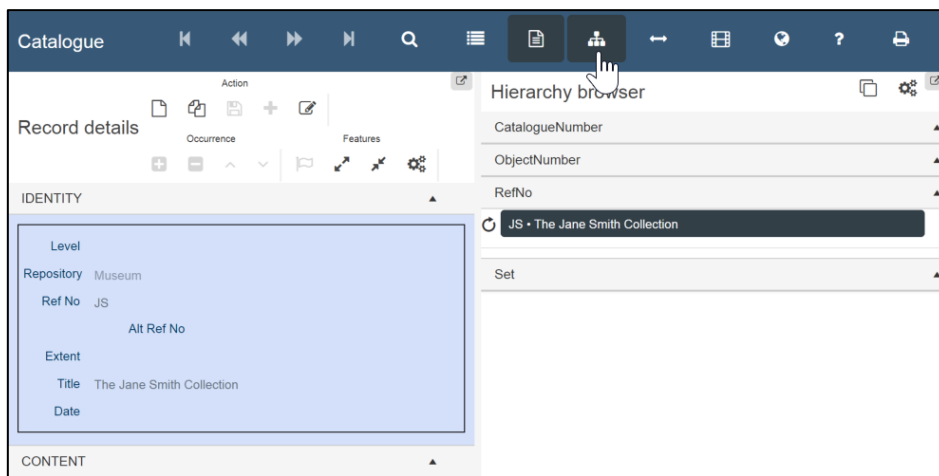
See a Different View of a Record

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

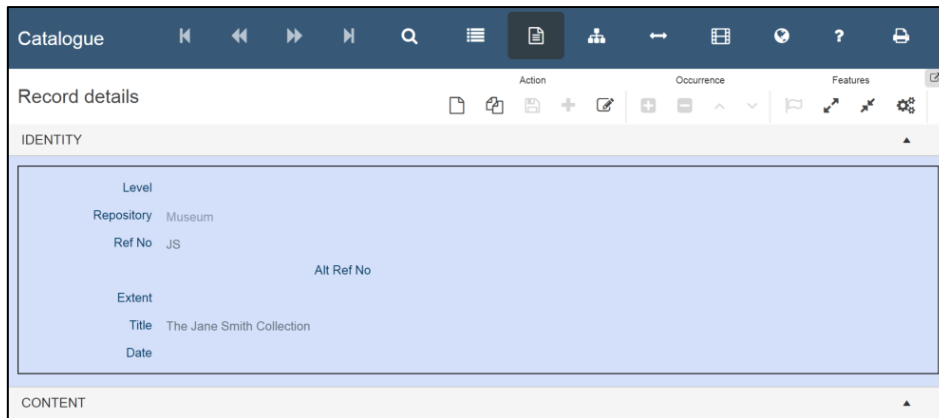
Start on a record in either edit mode or display mode:



1. Click the icon of any view you wish to open (for example 🏠) on the top toolbar
The view will be opened alongside any other views you have open

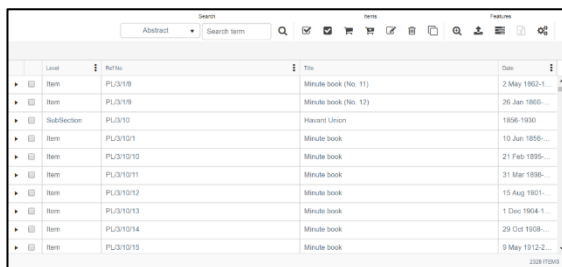


2. Click the icon of any view you wish to close (for example 🏠) on the top toolbar
The view will be closed

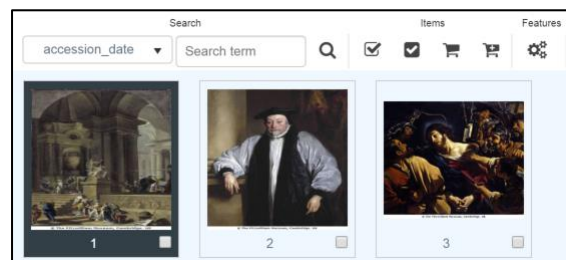


Views

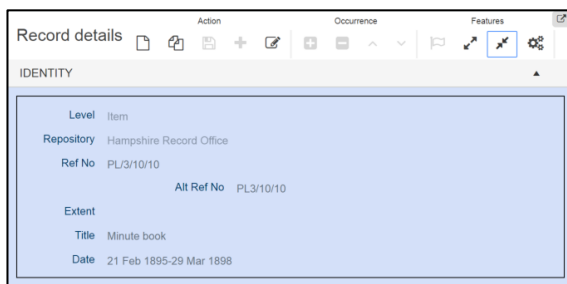
Collections gives you access to eight different views, which are different ways of seeing a record's information. You can use as many views as you think are necessary and hide any you are not currently using. Views are opened and closed using the toolbar at the top of Collections (called the 'top toolbar').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



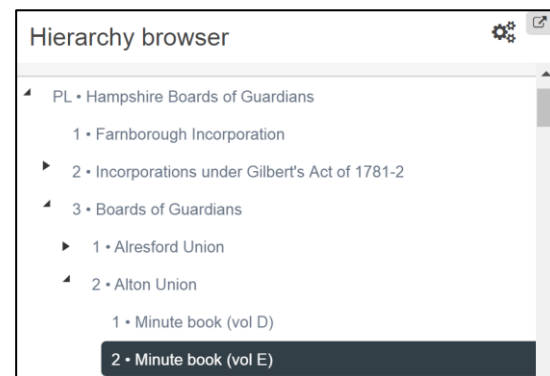
Result Set: A list of all the records you are currently working with.



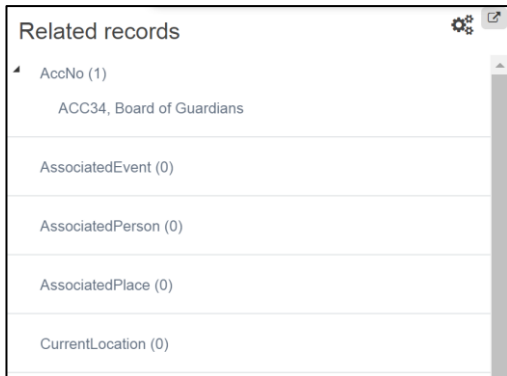
Gallery View: Images of all the records you are currently working with.



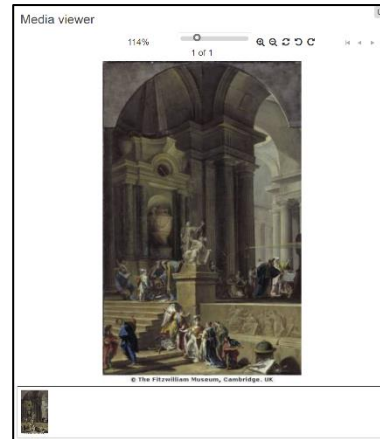
Record Details: All the fields on a single record, called the 'current record'. Most editing happens here.



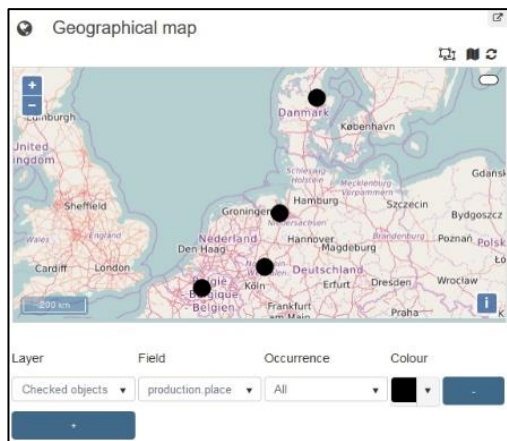
Hierarchy Browser: The hierarchy the current record is in. This is mostly used for archive and thesaurus records.



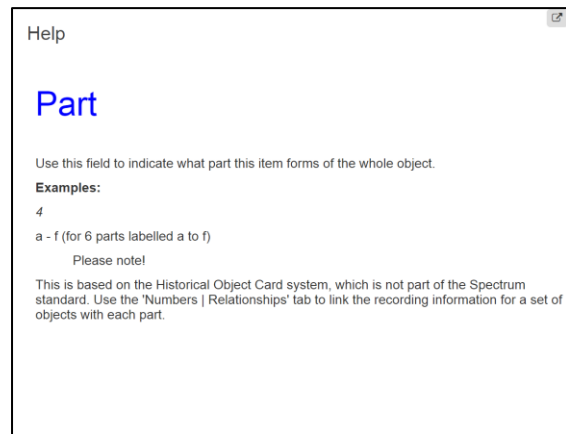
Related Records: All the records in other databases linked with the current record.



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



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



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

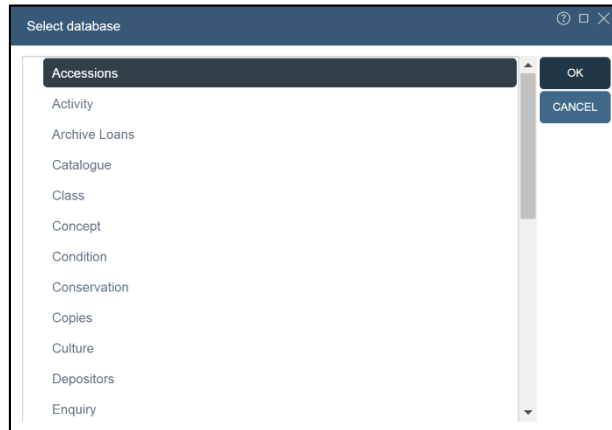
Search for a Record

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

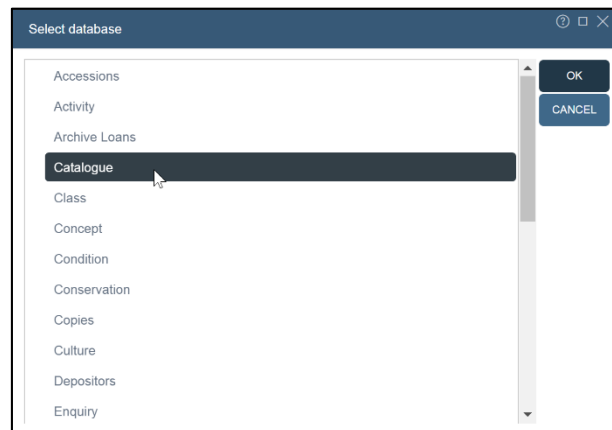
Start anywhere in Collections:

1. Click  **Search** on the main menu

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

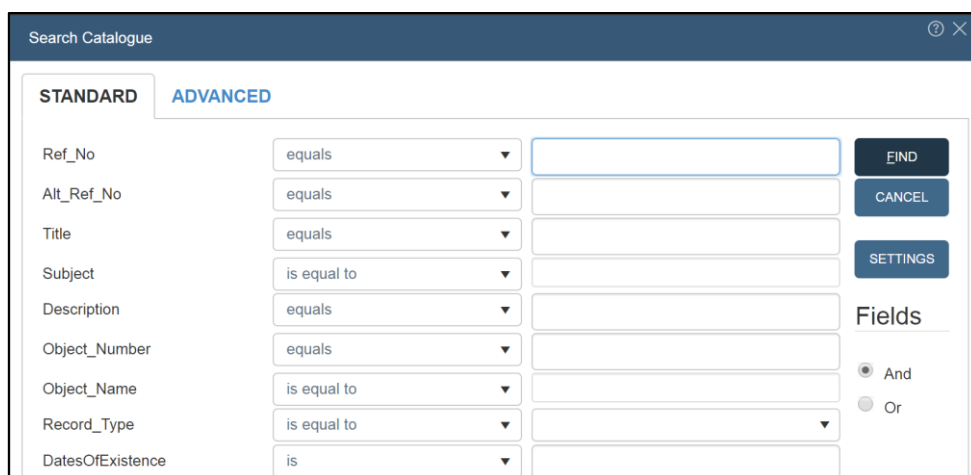


2. Click the name of the database you want to search in



3. Click 

A dialogue box will allow you to run a search



4. Click in a field you wish to search



A search form with a dropdown menu set to 'equals' and a text input field containing 'jane'.

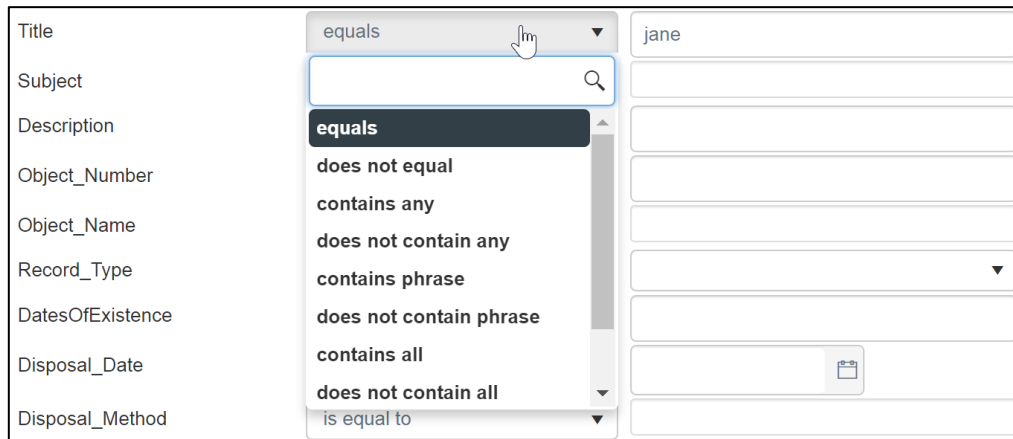
5. Type in a word or words you wish to search for



The search form with 'jane' entered in the text input field.

6. Click the box with an ▼

A list of possible ways to search will appear



The search form with a dropdown menu open, showing options like 'equals', 'does not equal', 'contains any', etc.

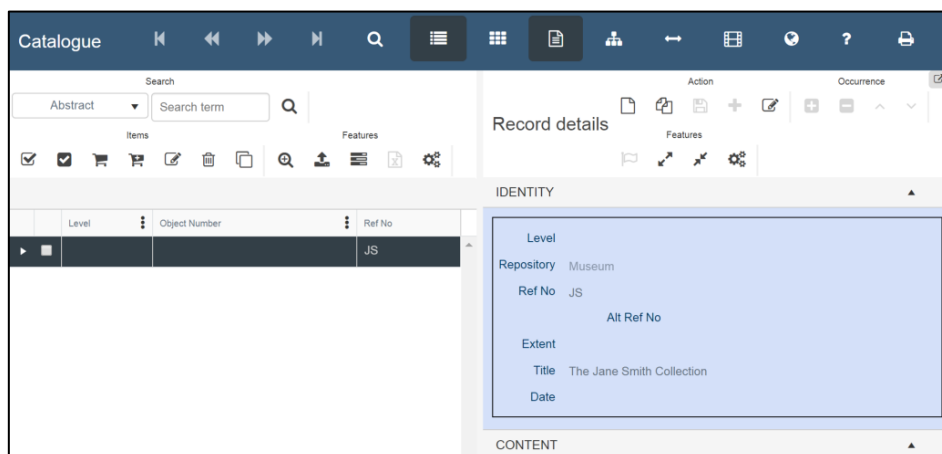
7. Click the way you would like to search the field



The search form with 'contains any' selected in the dropdown menu.

8. Click **EIND**

Any records that match your search will be opened



The AXIell Collections interface showing search results for 'The Jane Smith Collection'.

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

The Search Dialogue Box

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

The screenshot shows the 'Search Catalogue' dialog box with the 'ADVANCED' tab selected. It features a list of fields on the left, each with a dropdown menu for search operators and a text input field. The fields listed are: Ref_No, Alt_Ref_No, Title, Subject, Description, Object_Number, Object_Name, Record_Type, DatesOfExistence, Disposal_Date, Disposal_Method, Disposal_New_Object_Number, and Disposal_Note. The operators are: equals, equals, equals, is equal to, equals, equals, is equal to, is equal to, is, is equal to, is equal to, equals, and equals. There are buttons for 'FIND', 'CANCEL', and 'SETTINGS'. A 'Fields' section on the right has radio buttons for 'And' and 'Or'. Callouts provide explanations for the operators and field selection options.

Equals: what you type in will exactly match the contents of this field on the records you find
Contains: what you type in will be somewhere in this field on the records you find
Is Empty: this field will be empty on the records you find

Enter the text that you would like to search this field for

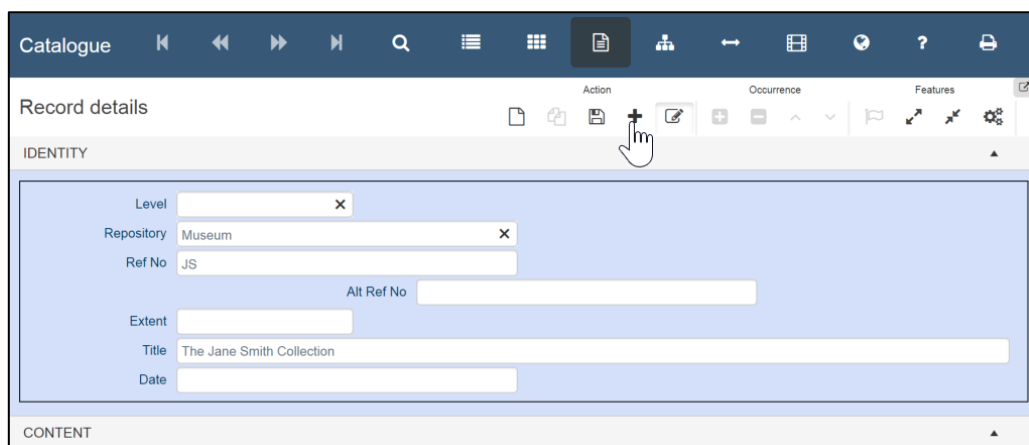
If you have typed into more than one field, choosing 'Or' means that Collections looks for records that match one of these fields, whereas choosing 'And' means that Collections looks for records that match every field

If you want to change the fields that will appear in the search dialogue box, do so here

Link to a Record in Another Database

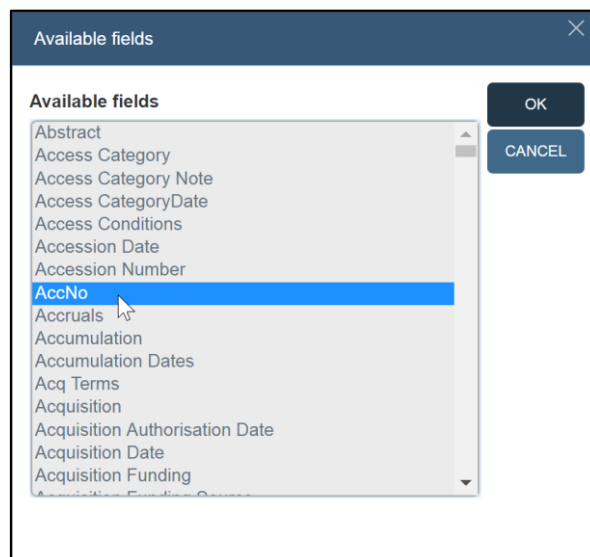
Everything you have done so far has taken you through the basic steps of using Collections which is all you need to get up and running. Linking a record to a record in another database (for example, to indicate that a catalogue record came to your organisation as part of an accession documented in an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

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

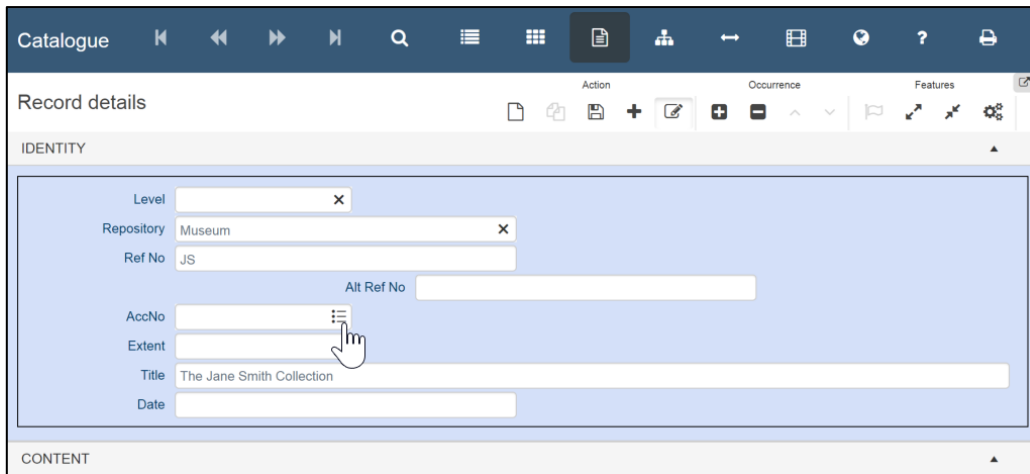


1. Click **+**

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

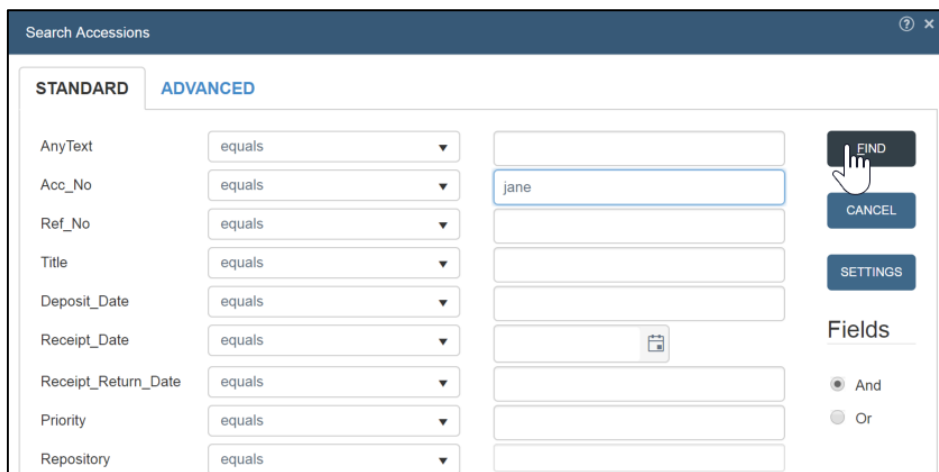


2. Click the field that is used to link to the database you would like to link to
3. Click **OK**



4. Click the ☰ at the right of the field you just added

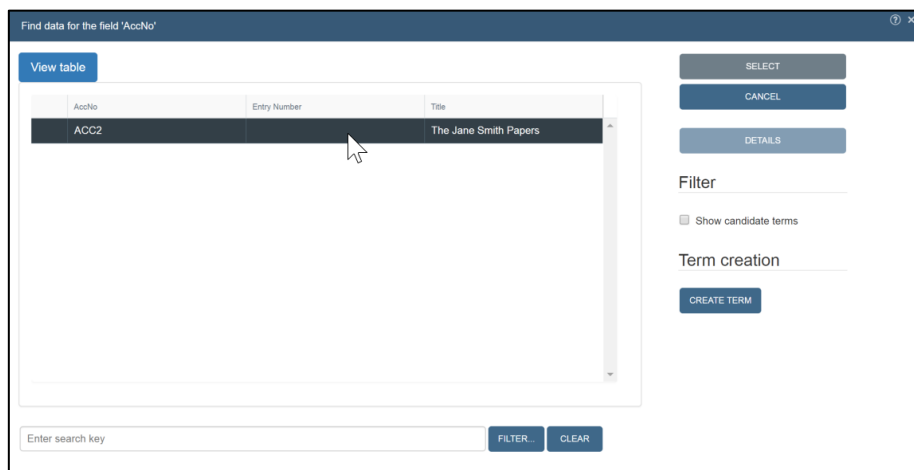
A search dialogue box will appear, allowing you to search for records in that database you can link to



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

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

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



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

7. Click SELECT

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

