Collections management software: vendor profiles

In 2017, the Canadian Heritage Information Network (CHIN), with the assistance of an advisory group of museum professionals, developed a vendor profile survey to collect key information about collections management software. This survey information is intended to supplement the Collections Management Software Criteria Checklist in order to assist museums in selecting the proper software to meet their needs. In the winter of 2018, the vendors demonstrated specific functions of the software systems, and community members evaluated and rated them (Please refer to our Scoring System & Evaluation Guide).

The survey results are presented below. The responses from the vendors have not been verified by CHIN, and museums are advised to contact vendors for additional information. This information, which was current as of January 2018, is provided solely to offer details about available software.

Inclusion of specific products does not mean that CHIN recommends the software, but that members of the community expressed interest in learning about these products. A vendor whose software is not profiled may contact CHIN to request a vendor profile for future inclusion.

Axiell

Adlib (profile)
Adlib (evaluation results)

Gallery Systems

TMS and eMuseum (profile)

Keepthinking

Qi (profile)
Qi (evaluation results)

Lucidea

Argus (profile)
Argus (evaluation results)

Lyrasis

CollectionSpace (profile)
CollectionSpace (evaluation results)

MINISIS Inc.

MINISIS (profile)
MINISIS (evaluation results)

PastPerfect

PastPerfect 5.0 (profile)
PastPerfect 5.0 (evaluation results)

Re:discovery

Proficio (profile)
Proficio (evaluation results)

SKINsoft

S-Museum (profile)
S-Museum (evaluation results)

Vernon Systems

Vernon CMS (profile)
Vernon CMS (evaluation results)
eHive (profile)
eHive (evaluation results)

Whirl-i-Gig

CollectiveAccess (profile)
CollectiveAccess (evaluation results)

Adlib by Axiell ALM - Profile

Note

This profile was completed by the software vendor at CHIN's request and does not reflect the views or opinions of CHIN. It is presented for information only and does not indicate approval or accreditation by CHIN. Inclusion of specific products does not mean that CHIN recommends the software, but that members of the community expressed interest in learning about these products.

This information was accurate as of January 2018. For more information or to request updated information, please contact the vendor directly.

Product name

Adlib

Vendor name

Axiell ALM

Vendor overview

Website URL

http://alm.axiell.com/collections-management-solutions/technology/adlib/

Head office

Fältspatvägen 4
Lund 224 78
Sweden
Year founded: *1987*
Telephone number: *+46 (0)46 270 04 00*
Email: *sales-alm@axiell.com*

Canadian/North American office

124 Church St. 3rd Floor
Toronto, Ontario M5C 2G8
Canada

Year opened: *1998*
Telephone number: *+1 (416) 238-5032*
Fax number: *+1 (416) 238-5022*
Email: *sales-alm@axiell.com*
Contact person: *Brad Lickman*

Product overview

Product description

Adlib is a flexible and customisable collections management system which can be adapted to all collections from the simplest through to the most complex and high profile.

Adlib software is renowned for its flexibility and the ease with which it can be tailored on-site by the customer. Specialised versions are available for Archive, Library and Museum collections, as well as fully integrated solutions for any combination of these.

With more than 25 years of service to the sector, our success is built upon our experience, resulting in software that is both easy to learn and pleasant to use. We ensure the resilience, high performance and future sustainability of our systems by employing Microsoft SQL database technology.

Adlib products readily integrate together to build an organisation-wide information management solution which is both efficient and comprehensive. Our software offers a completely "open" platform for managing and publishing collections data, which includes multi-lingual operation and support for all relevant data standards.

Adlib's flexibility is almost legendary. The adaptable nature of our applications means that they can be configured by the (trained) user to deal with almost any eventuality, however unusual. This also means that your investment in software is protected against unforeseen requirements that may arise in future.

These unique qualities have firmly established Adlib as the system of choice for more than 1,600 archives, libraries and museums throughout the world, from private collectors to the most prestigious national institutions.

Disciplines supported

- Archives
- Art Collections and Galleries
- Public Libraries
- Film Collections

- Library Special Collections
- Multi-discipline Collections
- History Collections
- Archaeology Collections
- Anthropology Collections
- Private and Corporate Collections
- Universities, Research, and Education

Product launch date

1987

Last major revision

- Adlib Version 7.4 released March 2017
- Model Application Version 4.5 released 2015

Product history

Adlib Collections Management Systems have been at the forefront of collections management for more than three decades. Comprehensive and flexible, Adlib can accommodate the requirements of any collecting institution, but is widely acknowledged to be the pre-eminent system for multi-discipline collections including Museum, Archive and Library materials.

Future development

Innovation

We build long term relationships with our customers by providing collections management solutions that meet their needs and stay relevant in an ever-changing collections management environment. Ours is a proactive development strategy. It demands both an understanding of where collections management is heading and the expertise to adapt our solutions to trends in collections management and to new technologies.

Expertise and knowledge are necessary ingredients but they are not sufficient to ensure that our collections management solutions remain relevant. Achieving that requires the availability of resources to support research and development and a willingness to commit those resources.

We have always committed resources to research and development, but we are now the leading provider of collections management software solutions for Archives, Libraries and Museums, and success affords us greater opportunities to do so. Approximately 10% of staff are dedicated to core research, with a further 20% engaged in development.

Our willingness to commit resources to research and development is driven by a commitment to building long term relationships with our customers. Our motto is "Close to the Customer" and we remain close to our customers by meeting their collection management needs now and always.

While a detailed product roadmap for Adlib is actively maintained, updated, and progressed, the specific details of our future development represent commercially sensitive information and cannot be publicly shared.

Demo version

Please contact an Axiell Sales representative for a comprehensive demonstration of the Adlib Collection Management system, by email at sales-alm@axiell.com or by phone at +1 416 238 5032.

- # Support

Support methods

Ninety days maintenance is included with the licence fee. After this time the customer may enter an annual support program priced at 20% of the current licence cost. A current annual support program provides all software upgrades; help desk support via phone/fax/email; remote issue resolution via modem or internet; and user community website and discussion forum.

Support language(s)

English and French.

Support availability and hours

Monday to Friday, 9 a.m. to 8 p.m. EST.

Support fees

20% of licence purchase cost annually.

Client support network

User discussion form available on Axiell's website.

Training

A range of courses are available in Canada, and can be viewed on Axiell's website.

System updates and maintenance

Ninety days maintenance is included with the licence fee. After this time the customer may enter an annual support program priced at 20% of the current licence cost. A current annual support program provides all software upgrades; help desk support via phone/fax/email; remote issue resolution via modem or internet; and user community website and discussion forum.

- # Cost

Pricing

Licensing for Axiell Adlib is by concurrent users of the Axiell Adlib database engine. Thus, Adlib can be made accessible to a wide user base with the license only affecting the number of users who can run the system simultaneously. Additional licences can be purchased at any time in groups of one or more. Costs for licences scale in number of licenses, thus the 8th license would be cheaper than 7th for example.

The Axiell Adlib license applies to the server machine and so one server can service the requirements of several campuses of an institution. Alternatively, if each campus requires its own server, then separate licenses would need to be purchased. However, bulk purchase discounts are available in such cases.

Additionally, as Adlib is a multi-discipline collections management system, the Adlib software is packaged into a tiered model, dependant on the types of collections it will manage (i.e., museum, archive, library, film.) This structure is defined as Adlib Standard (1 module), Adlib Plus (any 2 modules), Adlib XPlus (any 3 modules).

Maintenance costs

Ninety days maintenance is included with the licence fee. After this time the customer may enter an annual support program priced at 20% of the current licence cost. A current annual support program provides all software upgrades; help desk support via phone/fax/email; remote issue resolution via modem or internet; and user community website and discussion forum.

Additional fees

Installation and security model configuration

As part of the implementation process, Axiell will install Adlib on the client server, if locally installed, remotely. In addition to this installation, Axiell staff can configure the security settings to ensure user profiles, views, and privileges are configured to suit the preferences and roles outlined by the institution and the users of the system. Alternatively, there is an administrative tool that accompanies the Adlib Product, Adlib Designer, which would allow the database administrator at the client institution to set up and configure their own security settings which would make the implementation costs, more cost-effective.

Customization

Adlib is a comprehensively structured, full-featured collections management system. It includes a broad range of standard management and catalog support modules. Where possible, these conform to relevant world standards, most notably the Spectrum standard for museum documentation. As each institution differs, the catalogue, and supporting collections management datasets are customisable to meet the needs of the institution in order to manage their workflows effectively and efficiently.

Data migration

Most clients switching to Adlib have one or more sources of legacy data in various software systems. An important component of a successful implementation of Adlib is the migration of those legacy data into Adlib.

Based on Axiell's experience with legacy data systems, the data migration cost can be estimated to be anywhere in the range of a couple of thousand dollars to tens of thousands of dollars, depending on the number of different data sources and the complexities of each. Axiell would have to undertake a thorough investigation of a client's legacy data sources before being able to provide a more accurate figure. Alternatively, data migration can be performed on a time and materials basis. This data migration cost could be reduced if museum staff are able to prepare and export the existing data in a suitable format.

Training

Axiell offers a wide variety of courses. Training is organized on site. If the institution would like ongoing training or training for more staff, it can be arranged. Our training is very flexible, and we can work with project coordinators to tailor a training plan that will enable you to make the most of the project. More information.

Project management

One of Axiell's professionally trained and certified project managers will be assigned to the implementation project. Our project manager will work with both Axiell and customer project

resources to efficiently manage the entire project from initiation through to go-live, ensuring a successful, smooth transition to Adlib.

- # System specifications

Operating systems supported

- Server: Windows Server 2008 R2 or later.
- Workstation: Windows 7 or later; Current web browser versions.

Underlying database

Microsoft SQL Server.

Platform(s)

Adlib is a client/server application. The client side runs natively under Windows, and on a Mac using a Windows emulator. Because it is a Windows-based application it can automatically invoke any Windows-based applications such as word and image processors, and exchange data directly with such applications.

Adlib also offers a browser-based interface, Axiell Collections that gives browser access to many of the core functions of the Adlib collections management software. With this browser-based platform, users can access the collections management system from any browser, on a PC or Mac such as, Internet Explorer, Mozilla Firefox, Google Chrome, Safari, etc.

Hardware requirements

Minimum hardware requirement for server:

- Processor: Intel dual core Pentium
- RAM: 4 GB
- Disk space: 100 GB depending mostly on digital assets

Staff requirements

It is recommended that a minimum of one staff member be assigned the role of application administrator.

Plug-ins and/or modules available

Axiell DAMS

A Digital Asset Management System for Museums and Archives
Axiell DAMS provides simple, user-friendly access to the digital media stored in your collections management system, and to the full range of digital media (such as marketing collateral and other digital files) across your organisation. Designed to meet the needs of both marketing and collections departments, Axiell DAMS allows you to leverage your digital assets to raise awareness of your collections and institution. Axiell DAMS facilitates the efficient and secure sharing of digital media within an organisation, and supports the protection, preservation and management of digital assets. More information.
Axiell Onyx
iBeacon Technology
Provide visitors to your museum or gallery with multimedia-rich information about the objects they are interested in with Axiell Onyx on their iPhone or iPad. More information.
Reading Room module
This option provides all the functionality you need to deal efficiently with requests from researchers or others who wish to use your collections in a reading room environment.
The Circulation Management module (loans)
For quick and efficient lending transactions.
The Serials module
For managing magazine and loose leaf subscriptions.
The Acquisitions module
To manage the entire book ordering process.
Axiell Move

An app that operates on iOS devices to support location information, movement tracking, and packaging information.

Several Modules are also available as add-ons to the Internet Server software:

SDI (Selective dissemination of information) alerting
Makes it possible to deliver custom-made services. Your users can register an interest profile, so that the system can automatically inform them about relevant information and new acquisitions.
Online reservations
Allows web based users to reserve material from their web browser, and the user can also see what books you currently have on loan.
Axiell Connect
Adlib Office Connect is a plugin for Microsoft Office. In combination with an Adlib wwwopac.ashx server, the plugin allows you to search your Adlib databases from within Word, PowerPoint or Excel, with a very simple search interface: no knowledge of Adlib applications and their user interface is required. Selected data from the search result can be copied to the current document with a single mouse click, where the user can change the layout as desired. An easier way to access and present data from your Adlib databases is simply not possible.

Third-party requirements

None

Interoperability

Adlib API

The Adlib API is a command library that can be used to interact with Adlib databases or a 3rd party application such as a DAM/MAM/PAM. Using this API you can easily build your own applications through one of the three available methods: URL requests, Adlib.Data Windows .dll or jQuery plugin.

Accessibility

We are committed to ensuring everyone can use Axiell software and have developed our applications to suit different user needs.

There are a number of programs available that enable your computer to talk to you.

Microsoft Windows comes with a basic screen reader called Narrator, which reads text on the screen aloud and describes some events (such as an error message appearing) that happen while you're using the computer. You can find more information on how to use Narrator on the Microsoft website.

For Mac users, the Mac operating system also has a built-in speech to text function, which you can access by going to 'System Preferences' and selecting 'Universal Access'.

All recent versions of Microsoft Windows include magnification software. This allows you to greatly increase text size, although this will be restricted to only a small proportion of the screen. To use Windows magnifier, click on 'Start' then select 'Programmes' followed by 'Accessories' and 'Magnifier'. You can then select the amount of magnification you want from the dialog box that will appear on screen.

For Mac users, you can select the screen magnifier option by going to 'System Preferences' and selecting 'Universal Access'.

Adlib implements many keyboard shortcuts to provide access to data entry and searching functions for users that have difficulty using a mouse.

The Level AA Web Content Accessibility Guidelines 2.0 of the W3C proscribe extensive options for accessibility, and these guidelines are important facets of our design and development for web-based applications.

Customization

Adlib is a comprehensively structured, full-featured collections management system and so rarely requires customization. It includes a broad range of standard management and catalog support modules. Where possible, these conform to relevant world standards, most notably the Spectrum standard for museum documentation. There are many more fields available in Adlib than most users' legacy systems accommodate. Further, the Adlib model makes extensive use of text boxes for notes related to various parts of the catalog, while every module also includes a Notes tab for any other miscellaneous information.

Other features of Adlib include locally configurable user and institution defined pick lists and authority files; a rich suite of supporting modules, including rights and copyright, artist biographies, and an institution configurable security system.

However, should the pre-configured Adlib system not completely meet the needs of a client, Adlib includes a product called Adlib Designer that allows the System Administrator the ability to customize virtually any component of the system to the specific requirements of that client without compromising the "upgradeability" of the system. Customization of the catalog, or other Adlib modules, can be performed by Axiell on a time and materials basis or can be undertaken for a fixed price. In the latter case, Axiell requires a comprehensive specification of those customizations before this price can be determined.

- ## Web integration capabilities

Cloud functionality

You are collections management experts and your time and resources are best expended managing collections, not maintaining hardware and software and networks on which your Collections Management System (CMS) runs.

We can host the CMS for you.

We are able to provide and manage the infrastructure to run your system securely, reducing infrastructure and staffing costs, leaving you to do what you do best: managing collections.

When we host your CMS, we:

- Manage the back-up of your data.
- Take care of upgrades, ensuring that your system is always up to date.
- Run professional grade hardware in a secure data centre.
- Provide secure access to your CMS from any web connection.
- Ensure you always have enough storage space.

Operation of the hosted CMS is covered by a Service Level Agreement (SLA).

Server location
Negotiated with customer as part of hosting SLA.
Security protocols
Negotiated with customer as part of hosting SLA.
Typical or average uptime
Negotiated with customer as part of hosting SLA.
Back-end maintenance procedures and downtime
Negotiated with customer as part of hosting SLA.

Browsers supported

Adlib and associated products are compatible with Internet Explorer version 8 and later, Safari Version 5 and later, Firefox version 29 and later, and Google Chrome Version 18 and later.

Web-based access for data entry

Web-based access for collections management

Work with your collections data anytime, anywhere through a web browser. Enable even inexperienced users to access data through an easy to use, modern interface. Facilitate data entry directly into your CMS from anywhere in the world.

- Axiell Collections Web UI is a free add-on to our collections management systems.
- Work with your data anytime, anywhere through a web browser.
- Axiell Collections Web UI works on PCs, Macs and Tablets.
- Check and edit object information in real time.
- Access insights and information when you need it.
- Work remotely and access your data.

Web publishing platform

Adlib Internet Server is a complete package to make library catalogues and museum collections accessible through the internet, for interested visitors from all over the world. Via this web application the visitor can perform simple or advanced searches for publications or objects in the collection, in the language of choice if so desired. Step by step, you easily move from the search tab to the results of a search, to the detailed presentation of one or more records, to making your own selection, and finally, to printing it for example, or to make a reservation.

Aside from the ease of use that this Adlib model web application already offers, there are many possibilities to customize the application, so that the web site properly represents the character of the institution. An Intranet is also available for staff read-only access.

Linked open data functionality

Adlib offers the creation of URI's which can be used to create linked data.

The Adlib Internet Server comes with a tool called "Sitemapper" that produces a URI (Uniform Resource Identifier) for each collection item which can be used for different purposes. For instance, with the use of Google Web Mastertools, it can be used for indexation. This way your collection items can be found with a Google search.

Performing a search with the Adlib Internet Server and clicking on a specific object produces a unique URL which can be linked to by third parties (portals etc.) I don't believe that is regarded as linked data though.

Using linked (open) data in Adlib:

- Creating a link between Adlib record and e.g. Getty Vocabularies (Getty AAT etc.) enables you to use "live" concepts and data in the Adlib collection management system. This way the CMS is being provided with standardized concepts and contextual data automatically. This gives the museum faster and better and continuously updated descriptions.
- The customer needs the API and it needs to be configured. If the customer likes to derive specific information included in the Adlib fields then that is possible but this will not be "refreshed" automatically.
- You can also create a reference field in the Adlib database and simply copy and paste the URL you would like to use. Clicking the URL in the Adlib database gives access to the information.

User groups and security

User profiles

Adlib software employs a role-based security system. Roles may have the following rights: None, Read, Read/Write or All for any part of the Adlib application (e.g. screens, reports) or Adlib database (datasets and fields). Access rights can also be applied to individual records.

Pre-determined access rights are assigned to roles and these roles are assigned to individual users or user groups, which can be associated with users or groups defined in Microsoft Active Directory. This offers efficient protection against unauthorized access to data or application

functionality. At the same time, the whole process of user authentication and access management are simplified, as administration tasks such as managing and enforcing password policies may be carried out within Active Directory, while application specific access rights are managed in Adlib Designer.

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Visitor profiles

Adlib has an extensive and sophisticated access management system that provides Administrators with the ability to control access to nearly every facet of Adlib by user. A user account with a "visitor profile" can be created and maintained by the application administrator with appropriate access, both to data and functions, as is required.

Installations

There are no restrictions on the number of computers that can have the Adlib client installed or running simultaneously.

Audit trails and/or edit history

Adlib offers the ability to track all logged actions that have been processed on the server through the History feature. This feature allows users to select the History button and be presented with a part of the log of all actions processed on the server; to view all actions processed, users can select Get More to view additional log entries.

Additionally, in each record, across all datasets within Adlib there is a tab designated to track and document all changes that occur within the record and be displayed to users in read-only format.

Offline access

Adlib does not provide offline access.

Privacy features

No

Data migration and stability

Import formats

Adlib is an open system and interoperability is an important criterion in the design of the Adlib Software Suite. As standard, Adlib can import and export data in XML, in comma separated values or in Adlib tagged text format. EAD version 2 is included as standard and other XML formats required can be added by the system administrator by including the appropriate XSLT. These then become available to users as pre-defined input/output formats.

Adlib is capable of converting (importing) databases from the following exchange file formats to the Adlib database format:

- Adlib tagged
- dBase III/IV (*.dbf)
- ASCII delimited (*.csv)
- ASCII fixed length
- PICA III
- MARC (general ISO 2709)
- MARC (Ocelot)
- XML
- MARC (CDS-Isis)
- Image directory
- Modes

Export formats

Adlib is an open system and interoperability is an important criterion in the design of the Adlib Software Suite. As standard, Adlib can import and export data in XML, in comma separated values or in Adlib tagged text format. EAD version 2 is included as standard and other XML formats required can be added by the systems administrator by including the appropriate XSLT. These then become available to users as pre-defined input/output formats.

Backups

Adlib requires no special backup software and does not use raw partitions. Any standard backup and restore software provided with an operating system or third party product (e.g. Arcserve) may be used. Axiell can provide backup options for their hosted service.

Standards and schemas

Metadata schemas

- Dublin Core
- MARC
- RDA
- RDF
- LIDO
- EAD
- EAC

Data content standards (cataloguing rules)

- Spectrum
- CIDOC CRM Core
- MIDAS
- ICOM Documentation Guidelines
- CDWA
- LIDO
- CCO
- VRA Core
- CHIN Data Dictionaries
- Object ID
- EDM

Vocabulary standards

Adlib has the functionality to link subject and name headings to collection records. This is done using controlled vocabulary, i.e., the Thesaurus dataset. Fields can be set to automatically be validated against the thesaurus dataset to ensure fluid and accurate data entry. Many friendly-thesauri can be ingested into Adlib (Getty A&AT, LCSH), or thesauri such as Chenhall and CHIN Data dictionaries. Adlib can be configured so that any field can be subject to thesaural control.

Local terminology lists

Adlib is able to maintain Local Terminology Lists in addition to standard vocabulary lists.

Accreditation

Collections Trust – Spectrum compliance.

Data entry and content

Media upload/linking

Digital assets can be ingested into the Adlib DAMS in many ways, including:

- Individual asset upload to a particular dataset within the application.
- Though bulk upload through the batch import utility available in Adlib Designer.
- Using the bulk upload utility, Adlib Ingest Module, which enables users to create Adlib records and store their Digital Assets safely by dragging and dropping these into a "hot" folder.

Media formats supported

- BMP
- TIFF
- WMF
- JPEG
- PNG
- GIF
- ASF
- AVI
- MP4
- MPEG
- WAV
- AAC
- AIFF
- MP3
- WMA
- Any format supported by Windows Media Player (varies according to Windows version)

In addition any other format can be supported by a direct link to open the file in the appropriate external viewer.

Data entry features

Adlib provides a suite of powerful data entry tools in the Adlib desktop application, as well as in a variety of web-based applications useable across a wide range of functions and roles.

Copy and paste
Yes
Search and replace
Yes
Spellcheck
Yes
Bulk cataloguing
Yes
Batch edit
Yes
Batch location change
Yes
Duplicate record search
Yes, upon import – Adlib can identify if a record already exists and merge/update data in the record.
Template record
Yes.
Date selection and formats
Yes
Mandatory fields
Yes. Application Administrators can set desired fields as mandatory.
Others
No response.

Spreadsheet editing view

Yes, the browser-based interface, Axiell Collections, allows users to edit single records, or groups of records through a spreadsheet editing view type.

Geographic mapping

Yes, the browser-based interface, Axiell Collections offers a geographic mapping view. The view is meant to display locations (as registered in different fields in your records) on a world map for a quick visual overview. You can use it to easily track down main locations of storage or the geographical distribution of production places of a certain record selection or the range of content subjects of objects manufactured by a single creator, for example. Any field which contains geographical places may have been set up for the geographical map functionality.

Multilingual fields

Adlib supports multiple languages at both the system and data level. All prompts, menus and button can be displayed in the language selected by the user, and data can be stored and displayed in multiple languages. Switching between languages can be performed dynamically

at any time. Compliant with Unicode, Adlib can display a vast range of characters, as well as supporting right-to-left (RTL) languages, including Arabic and Hebrew. Again, dynamic switching between RTL and LTR languages is supported.

Barcoding

Adlib supports the creation of unique barcode strings, printing of barcode labels, and retrieval of data through a variety of interfaces and devices, through barcode technology.

Labelling

Adlib supports the creation and printing of label information through its various printing formats. A word template can be used to support the creation and printing of labels for use in exhibitions, etc.

- ## Search and reporting

Types of search supported

Adlib offers you three effective search tools. The Search wizard is easy to use, and runs on a selection of indexed fields. The Query by Form can be used to combine search queries and search multiple fields simultaneously. A powerful search language makes it possible to query every field of the database. You can compose your own queries and include operators such as 'equal to' or 'less than'. Logical operators (such as 'and' and 'or') are also supported. Both queries and their results can be stored for future re-use as a "pointer file".

Boolean queries
Yes
Query any field
Yes
Sort query results
Yes
Saving search results
Yes, search criteria can be saved as a 'pointer file' for future use.
Filter search results
Yes
SQL-based search
No
Export search results
Yes
Free-text (Google) searches
No

Search result views
Search results can be displayed in a list or form view.

Multilingual searching

Yes

Report styles included

Adlib comes with a selection of pre-defined reports. The reports available differ according to which part of the system is being used. For example, in the Archive Catalogue extended or hierarchical record listings can be created, whereas in the Accessions dataset Accessions lists can be created.

The system manager may create further 'pre-defined' report definitions and then insert them into the appropriate menu to become available for other users, via Adlib Designer, so the customer has full control over what 'standard' reports are available to system users.

Adlib is equipped with a very flexible report generating tool. It can create reports using its Print Wizard, writing to Microsoft Word templates, or by outputting in the preferred format of the client.

Microsoft Word can be used very conveniently for creating letters, labels and documents in which the company style of an organization is very important. For this purpose, default Word templates can be edited to enable printing of Adlib data with such a template. Documents that are created this way, can be saved, printed or sent through email.

Axiell Connect

Adlib Office Connect is a plugin for Microsoft Office. In combination with an Adlib wwwopac.ashx server, the plugin allows you to search your Adlib databases from within Word, PowerPoint or Excel, with a very simple search interface: no knowledge of Adlib applications and their user interface is required. Selected data from the search result can be copied to the current document with a single mouse click, where the user can change the layout as desired. An easier way to access and present data from your Adlib databases is simply not possible.

Report customization

Adlib is equipped with a very flexible report generating tool. It can create reports using its Print Wizard, writing to Microsoft Word templates, or by outputting in the preferred format of the client. Using this tool, users are able to define the fields and presentation of the report through the Print Wizard, allowing you to output the required information for a number of purposes.

Alternatively, Word Templates can be created to facilitate a number of report requirements and can be created in-house to meet the reporting needs of the institution.

For creating advanced reports, for which some pre-processing of data is necessary, the Adlib programming language ADAPL or XSLT will be required. Complex calculations, manipulations of field contents, etc., will be managed by ADAPL procedures (output formats) or XSLT stylesheets.

Report program

Adlib comes with a series of tools to generate new and customized reports in numerous formats using a wide range of report writers, including XML, Microsoft Word, Excel and PowerPoint.

- # Museum functions

Collections management function overview

Spectrum procedures:

- Object Entry (primary)
- Loans In (primary)
- Pre-entry
- Inventory
- Location and Movement (primary)
- Transport
- Cataloguing (primary)
- Condition Checking
- Conservation
- Risk Management
- Insurance
- Valuation
- Audit
- Rights Management
- Use of Collections
- Object Exit (primary)
- Loans Out (primary)
- Loss and Damage
- Deaccession
- Retrospective Documentation (primary)
- Acquisition (primary)

Registration

A primary obligation for a museum is the duty of care for its collections. Amongst other responsibilities this requires the museum to manage its collections, keep track of its objects, ensure they are well maintained, securely stored, properly insured and appropriately accessible. Adlib facilitates this duty of care through collection management processes and tools designed in compliance with the Collections Trust's Spectrum standard for museum documentation.

The Spectrum standard is recognized internationally as the industry standard for Collections Management. Spectrum is a guide to good practice for museum documentation and contains procedures for documenting objects and the processes they undergo. Adlib is fully compliant with the latest version of this standard.

Acquisitions

Adlib fully documents the arrival of objects at your institution, some or all of which may ultimately be accepted into the collection and thus fully cataloged. Accession information is stored within the internal object catalogue for museum collections, whereas, there is a separate dataset when working with Archival materials called, Archives (accessions), to manage the accession information and establish the relationship to the catalogue record when the material is ready to be fully catalogued into the collection. These tabs and datasets document a summary of the objects/materials that are donated, gifted, bequeathed, etc. to the institution and can track the status (i.e., under consideration, accept, reject, etc.). All details related to the accession would be managed, such as actual purchase price for acquisition, receipt date, accession number, rights and restrictions, etc.

Inventory management

No response.

Internal tracking

This is standard functionality in Adlib. Every movement can be recorded at all levels of the catalogue. Future movements can also be planned and the system automatically keeps a full audit trail of previous location movements, including details of time, date and authoriser, etc.

Information relating to loans, exhibitions etc. are recorded in their specific datasets and can also be used to keep check of an item's location. Additional fields not included in the standard application can be added using Adlib Designer.

An additional feature (costs not currently included) there is an optional barcode/RFID movement module, Axiell Move, which can update the database location of items by scanning

them. This includes functionality for packing, moving and unpacking containers holding several items, the individual locations of each is tracked by the system.

External shipments

The Transport dataset tracks all information pertaining to objects and materials that are physically leaving from or coming into the institution. A new entry record should be created for every time an object or unit of description enters the institution. An entry record can be linked to one or more objects or units of description. Also, an object or unit of description can be linked to multiple entry records, for example, one entry record can cover the moment when the object was acquired by the organization and another can cover the return from a loan to an external organization. In addition to documenting the entry of objects and units of description, the transport dataset can also track exit procedures and information in a similar fashion to the Entry record described above.

Cataloguing

The Adlib system is centred on the catalogue, and here the emphasis is on clear, logical structure. Although very comprehensive in scope, the degree of detail to be entered into each catalogue entry can be determined by each institution. The derive record function allows bibliographic records to be downloaded directly into the catalogue from a variety of on-line sources such as the Library of Congress, while powerful tools for managing terminology ensure that data is consistently recorded. The standard catalogue includes the following functionality: Bibliographic description and imprint; Abstract, classification and keywords; Historical/rare book information; Administrative data; ISBD presentation; Unlimited number of copies per title description; Attach digital media. Adlib is flexible enough to deal with all kinds of publications, including digital and multimedia files. The standard catalogue includes templates for several different types of material including: books, audio-visual materials, journals, loose-leafs and articles. Of course, the layout of these templates is fully flexible and can be edited to suit the needs of the library/museum, including the definition of completely new custom templates if required.

Conservation

The Assessments and treatments dataset documents and tracks the condition and conservation activities related to the collection. Conservation work on objects can be scheduled and monitored, capturing examination details, a description of the damage or other reason for conservation treatment, details of the treatment performed, the results of those treatments, and any associated costs. Assessments and treatments records make extensive use of the multimedia repository to record images and video of objects before and after conservation work, as well as audio and written documents describing treatments. Conservation information is retained in perpetuity, giving a comprehensive history of the

treatments applied to an object, and also providing a knowledge-base to improve the effectiveness of future conservation activities.

Curatorial research

The Research/Use dataset documents the use of collections which are relevant for the archive or museum. These include education handling collections, the operation of objects, research, enquiries, and the commercial use of objects and associated documentary archives. Users include staff, volunteers, or the public – whether in person, by letter, telephone or any other means of communication.

Publications and printed material

General bibliographic references, including books, journals, articles, papers and theses are recorded in Adlib in the datasets related to the Library. Additionally, there is a Copies dataset that allows the institution to track copies of materials and manage the activities related to though individually while still maintaining the relationship to the original.

Rights management and reproduction

This is standard functionality in the Adlib Archive module via fields in the Conditions of access and use (ISAD) tab, which includes fields for recording conditions governing access and reproduction. More complex rights management is available via the Rights tab from the Adlib Museum application, this is Spectrum compliant and part of the system configuration.

The Adlib Museum application includes detailed copyright and other rights data can be recorded in each catalogue record.

There are fields to record information about Rights Type (i.e. assigned externally, or incoming); Reference; Holder; Consent status; Requester; Authoriser; Start and end dates; Notes.

Risk management and valuation

The value of an object, the date of its valuation, the valuing authority and the next scheduled valuation are documented in Adlib, with a history of valuation information automatically maintained. It is possible to:

- Set a regular valuation interval frequency (in years or months).
- Set a specific date for the next valuation.
- Using the Scheduled Search functionality, users can receive a notification report when the next valuation is due.

It is common for security reasons to restrict access to an object's valuation details to valuation staff and management.

Exhibitions

Adlib Museum includes an Exhibitions module which includes tabs for Exhibition Details, Related exhibitions, Documentation, Linked objects, Loans, Reproductions and Management details. It is a friendly database with the Internal and External Catalogue.

Loan management

Adlib manages your incoming and outgoing loans, using the Incoming loans and Outgoing loans datasets to manage these activities. From the Incoming and Outgoing Loans datasets, users are able to document and track all loans and related information while maintaining that relationship to the objects or units of description which are a part of that particular loan. They capturing details such as the borrower, objects loaned, start and end dates, approvals, and associated costs. Loan documentation, including a loan agreement form, can be generated from within Adlib and can even be scanned and attached to the loan record as a permanent soft copy of the signed agreement. These datasets also store the Loan History of a particular object of unit of description over the lifespan of that item in the collection.

Deaccessions

Deaccessioning an object results in the object's logical removal from the collection: for most users the object will appear to have been removed from the Internal Object Catalog. Authorized users however are able to search for and retrieve deaccessioned object records, allowing audits of deaccessioned objects to be undertaken. Deaccession details include the date of deaccession, a reason for deaccession (lost, stolen, destroyed, etc.), terms and conditions of the deaccession, and authorization details.

Digital asset management

Images, movies, audio files, documents, and born digital files can be linked to records and are stored in the client. When a record contains one or more media files, like images, those images will be shown in the Media Viewer during the detailed presentation of a record. The Media Viewer has three viewing options – Normal (one image at a time), Thumbnails and Filmstrip view. It is also possible to zoom in and out of images.

Adlib complies with EXIF, IPTC and XMP digital metadata standards.

Additional features and functions

Derive functionality

Adlib includes a Derive function which allows an external source(s), such as the Library of Congress thesauri. For example, to derive a record from the Library of Congress, you open the Books dataset, choose Start, Derive, Library of Congress to open a search form with which you can search in the external source. Original records will never be deleted from the external sources, of course.

In some model applications, but possibly in your customized application as well, external sources may have been defined as friendly databases.

The following add-ons are available:

- Reading Room module: This option provides all the functionality you need to deal efficiently with requests from researchers or others who wish to use your collections in a reading room environment.
- The Circulation Management module (loans): for quick and efficient lending transactions.
- The Serials module: for managing magazine and loose leaf subscriptions.
- The Acquisitions module: to manage the entire book ordering process.
- Axiell Move: An app that operates on iOS devices to support location information, movement tracking, and packaging information.

Several Modules are also available as add-ons to the Internet Server software:

- SDI (Selective dissemination of information) alerting: Makes it possible to deliver custom-made services. Your users can register an interest profile, so that the system can automatically inform them about relevant information and new acquisitions.
- Online reservations: Allows web based users to reserve material from their web browser, and the user can also see what books you currently have on-loan.

Axiell Connect

Adlib Office Connect is a plugin for Microsoft Office. In combination with an Adlib wwwopac.ashx server, the plugin allows you to search your Adlib databases from within Word, PowerPoint or Excel, with a very simple search interface: no knowledge of Adlib applications and their user interface is required. Selected data from the search result can be copied to the current document with a single mouse click, where the user can change the layout as desired.

Adlib by Axiell ALM - Evaluation

About this evaluation

This evaluation was performed on February 15, 2018 with a representative from Axiell. It was evaluated by five members of the museum community and reflects their personal opinion. These evaluations were based on a set list of tasks in a limited period of time. It is always recommended that you request a demonstration of any product in which you may be interested based on your specific requirements.

Evaluator ratings

The following table shows the ratings given to this software by members of the museum community. To understand what these ratings mean, please refer to our Scoring System & Evaluation Guide.

Each rating given is scored out of a maximum of five points. The larger the Standard Deviation number, the wider the range of scores for that task.

Task	Average	Standard Deviation
Online data entry	4.2	0.84
Publish a record to the web	3.6	0.55
Set user permissions and groups	3.4	0.55
View audit trails or change log	3.2	0.84
Import data	3.6	0.55
Export data	3.6	0.55
Create a local terminology list	3.6	0.55
Upload or attach images and files	3.6	0.89
Catalogue an object	3.4	0.55
Batch modify a set of records	3.2	0.84
Multilingual capabilities	3.6	1.34
Customize a catalogue entry page	3.2	0.45
Create a template record	2.2	1.48
Generate and/or build a report	3.2	0.84
Perform basic search	3.4	0.89
Perform advanced search	3.6	0.55
Browse records	3.8	0.84
Create an exhibit	3.4	0.55
Enter condition report information	3.2	0.45

Evaluator comments

The following comments have been provided by our evaluators after they rated the performance of each task. These are selected comments drawn from the "Additional Comments" section of the evaluation form.

- Old design.
- A very good system! One of my favourites. The interface is user friendly and aesthetically appealing, while the ability to choose a designer that meets your specific needs is very efficient.
- Their products seem outdated and to come from a previous computer generation.
- With 75-80% ability to work through the browser application, I would choose this option over the back end application. I found the multiple tabs and pop-up boxes to be a bit overwhelming; however, there were some good built-in quality control features.

TMS and eMuseum by Gallery Systems - Profile

Note

This profile was completed by the software vendor at CHIN's request and does not reflect the views or opinions of CHIN. It is presented for information only and does not indicate approval or

accreditation by CHIN. Inclusion of specific products does not mean that CHIN recommends the software, but that members of the community expressed interest in learning about these products.

This information was accurate as of January 2018. For more information or to request updated information, please contact the vendor directly.

Product name

TMS and eMuseum

Vendor name

Gallery Systems

Vendor overview

Website URL

www.gallerysystems.com

Head office

5 Hanover Square, Suite 1900
New York, New York 10004
Year founded: 1981
Telephone number: (646) 733-2239
Email: info@gallerysystems.com
Contact person: Paul Thyssen

Canadian/North American office

5 Hanover Square, Suite 1900
New York, New York 10004
Year founded: 1981
Telephone number: (646) 733-2239
Email: info@gallerysystems.com
Contact person: Paul Thyssen

Product overview

Product description

TMS

Gallery Systems' core product, The Museum System (TMS), is a sophisticated, easy-to-use relational database application designed specifically for collections, content, media, exhibition, and loan management. Developed in partnership with museum professionals, TMS is a robust and highly configurable collection management system that can organize and manage all collection types without compromise. TMS is built upon an open-architecture database, running on Microsoft SQL Server or Oracle, and Gallery Systems provides a fully-documented Data Schema and Data Dictionary as part of the software package. This ensures that interoperability with other enterprise systems is achieved with minimal effort. TMS is comprised of 10 interrelated modules, with supporting functionality for entering and tracking all collections data and management activities. TMS has been localized in over 24 languages and supports translated content data entry in multiple languages. TMS complies with many data standards including CDWA, CDWA-Lite, CCO, LIDO, ISAD(G), DACS, EAD, CCDO, Getty vocabularies (AAT & TGN), Europeana, CHIN, RAD, Dublin Core Metadata Standards, VRA Core 4.0. TMS is Spectrum Certified and the current TMS data schema was designed specifically to accommodate the extension into the CIDOC CRM data model. TMS is compliant with Open Archives Initiative (OAI).

eMuseum

eMuseum, Gallery Systems' web-based software program, integrates seamlessly with TMS to dynamically publish information to websites, Intranets, and kiosks. While eMuseum is delivered with a set of standard templates, configuration is simple which makes the production of unique web sites straightforward. eMuseum uses industry standards such as HTML5 and CSS and incorporates responsive design. eMuseum's design improves search engine optimization for better search engine rankings.

Disciplines supported

TMS supports all collection types including archives and library collections management.

Product launch date

TMS

1981

eMuseum

2001

Product history

The Museum System (TMS) originally emerged in 1981 as The Gallery System (TGS), a DOS-based application created for commercial galleries. Shortly thereafter, in close collaboration with the Metropolitan Museum of Art and through researching and dissecting the numerous functions involved in maintaining sophisticated cultural heritage collections, Gallery Systems introduced The Museum System (TMS), a Windows application and almost every year since has included new releases and/or updates to the core application. The current version released in 2017 is TMS 2017 and includes extended capabilities of TMS' range of web browser-based accessory applications: TMS Media Studio, TMS Conservation Studio, and TMS Audit Manager.

eMuseum was first released in 2001 and the current version, eMuseum 5.1, was released in 2017.

Future development

The next release of TMS is scheduled for 2018. TMS is also in development to become a completely web browser-based solution, including a suite of ancillary native web browser-based applications.

Demo version

Gallery Systems does not provide standalone demo versions of the applications. However, demo databases and "sandboxes" can be configured for limited trial purposes on a case by case basis.

Support

Support methods

Phone, email, and client support website.

Support language(s)

English, French, Spanish, and German.

Support availability and hours

Gallery Systems offers support during normal business days from 9:00 a.m. to 8:00 p.m. Eastern time in North America. Our staff in Europe and California are also available when needed, which extends the coverage to 3:00 a.m. to 9:00 p.m. Eastern time. During weekends, support email and phone lines are monitored remotely by assigned members of the support team.

Support fees

Included with annual maintenance package.

Client support network

Gallery Systems provides a comprehensive support portal that contains various forms of documentation and tutorials, peer discussions, and also allows clients to manage support cases. Additionally, clients may opt-in to a client-led, independently run listserv for further support and discussion.

Training

Gallery Systems offers comprehensive TMS training as part of our implementation approach to ensure successful use of the system. System administration and application training for core staff members is part of our “train the trainer” methodology to ensure a successful implementation. There is a fee for each training session.

System updates and maintenance

Gallery Systems’ standard Maintenance and Support services include full access to new releases of our software. For our existing products, we regularly provide interim updates incorporating bug fixes and additional features and functions between major version releases. Software upgrade packages are provided as part of annual maintenance and support.

Cost

Pricing

TMS is licensed per concurrent user and a one-time license fee. eMuseum is an offered as unlimited user license and a one-time license fee.

Maintenance costs

Annual Maintenance is delivered and charged annually as a recurring fee and includes updates/upgrades to the program.

Additional fees

Gallery Systems provides competitively priced business analysis, technical consulting, development, training, data migration, project management services and managed hosting services.

System specifications

Operating systems supported

Windows 7, 8.1, and 10 Windows Server 2012, 2012 R2, 2016.

Underlying database

SQL Server 2012, 2014, 2016 Standard Edition or higher, or Oracle 11gR2, 12c.

Platform(s)

TMS is accessible on desktops and certain mobile tablets. eMuseum is accessible on desktops and mobile, such as smartphones and tablets.

Hardware requirements

The current minimum workstation configuration is:

- 2.5 GHz dual core processor or better.
- At least 4 GB system RAM.
- 512 MB display memory capable of supporting 1024 x 768 video resolution.
- 1 Gbps network card.
- Windows 7 or higher.
- ODBC drivers for supported database server.

The current minimum server configuration is:

- Second server required for thesaurus and web applications.
- Quad core processor (or 4 virtual CPU).
- 8 GB RAM.
- A supported database server (not required for second server).
- Windows Server 2008 R2.
- 100 GB free hard disk space (for installation of database).
- Additional disk storage (sufficient to manage the collections database, thesauri, and images, with extra space for growth).
- 2 MB display memory capable of supporting 1024 x 768 or higher resolution.
- Network card.

Optimal hardware specifications depend on the clients' workload requirements.

Staff requirements

Each institution should understand the full scope of their staff time and expertise required for their implementation of TMS, including: project management, system design, data cleanup, mapping, migration and testing, if necessary.

Gallery Systems recommends that the museum's core TMS team consists of a project manager to communicate directly with Gallery Systems staff and coordinate project flow, web and/or system administrators, a head registrar/collection manager, and content experts from various museum departments.

Plug-ins and/or modules available

- TMS Conservation Studio
- TMS Media Studio
- Audit Manager
- Barcode Manager

Third-party requirements

- Windows
- Microsoft SQL Server or Oracle
- "Full" SAP Crystal Reports (only to create or modify certain reports)

Interoperability

The TMS and eMuseum data schema is open architecture, running on Microsoft SQL Server or Oracle, which means that interoperability with other systems is achieved with minimal effort, and business standard third party reporting tools like Microsoft Office, Microsoft SQL Server Reporting Services, and Crystal Reports are used.

eMuseum provides an API add-on that allows users to programmatically retrieve data in JSON, XML and RDF formats. We also support the IIIF image and presentation APIs.

Accessibility

eMuseum follows WCAG 2.0 AA and most AAA guidelines, ensuring that labels, titles, alternate text and the general style contrast of the application comply with current standards. eMuseum uses an HTML based template system supplemented with CSS and JavaScript, which can be customized to meet additional requirements.

For TMS, accessibility is generally available via Windows' built-in Accessibility features. For example, Windows includes a tool called "Narrator" that reads text on your PC screen aloud and describes events, such as notifications or calendar appointments. There are other Windows tools and configuration settings that allow a user to use speech recognition to control their PC, magnify screen

contents, set desired contrast settings, use an on-screen keyboard and provide different aural cues when certain keys are pressed, adjust the mouse pointer size, etc. Using combinations of these tools may provide the required level of accessibility. Note that different versions of Windows may have different accessibility options and/or improvements to the same tools existing in prior versions.

Customization

TMS is highly customizable, and supports custom list views and custom data entry forms, which can be configured by the user and/or administrator with the provided tools, List View Designer and Form Designer. All field names can be edited. Error messages are localized and can be customized. TMS supports a wide range of configuration settings including date and label formats, currency, units, status flags, etc. and these can be configured between the included Database Configuration Utility and Maintenance of lists.

Web integration capabilities

Cloud functionality

Gallery Systems offers cloud hosting options for all products. We perform the nightly backups, schedule service pack upgrades, monitor database health, and can perform all the other system administration duties, as required.

Server location

Gallery Systems has servers located at a datacenter in Manhattan, New York, NY, but additional virtual servers are located in datacenters around the world including Canada.

Security protocols

- SOC 1&2, HIPPA, PCI, SSAE 16 Compliant
- Multiple layers of hardened physical security
- 24x7x365 on-site security
- CCTV surveillance with digital storage
- Multiple layers of electronically controlled card access
- Biometric access

Typical or average uptime

95% for TMS and 99% for eMuseum. 95% for TMS applies to 365 days a year, 7 days a week, 24 hours a day, so that during the workday hours, the most likely result is 99+% availability.

Back-end maintenance procedures and downtime

Extended maintenance is done over the weekend, typically Saturday morning. Some maintenance is done after hours during the week, if necessary.

Browsers supported

Chrome is tested, but others may be supported.

Web-based access for data entry

Gallery Systems can provide access to TMS and any of our browser based offerings over the internet using secure protocols. Gallery Systems application hosting provides secure access and is also available with optional web-browser accessibility.

Web publishing platform

Gallery Systems offers eMuseum, our web publishing toolkit for public access purposes. eMuseum integrates seamlessly with TMS to publish data to an Intranet or website, and can be configured to support tagging, commenting, integration with social media, search engine optimization and the generation of URIs and links back to collection web pages. Gallery Systems offer a complete design service to ensure that the 'look and feel' of eMuseum is consistent with your existing web presence or to create a new visual identity. eMuseum offers an API.

In addition, clients can participate in eMuseum Network, a cross-organisation information searching and retrieval service. Object information can be downloaded and imported into TMS, from eMuseum, via the Object Importer tool.

Gallery Systems provides support for exporting information in a wide variety of formats, including LIDO and CDWA Lite, and TMS provides support for integrating with OAI-PMH.

Linked open data functionality

All URLs in eMuseum, including record detail pages from all modules (Objects, Constituents, Exhibitions, etc.) are persistent URIs. Using eMuseum’s API add-on, users can retrieve or view collection data in RDF format. Additionally, all fields are annotated with RDFa using the Schema.org vocabulary. Customizations have been done to link ULAN and VIAF data to eMuseum.

User groups and security

User profiles

In TMS security control over access permissions to view/edit/add/delete data is available down to the individual field level, and control over access to system functions (e.g. maintain authority files, update locations) is similarly comprehensive. Such permissions can be assigned to individual users (e.g. database administrator, collection manager), or distinct groups of users (e.g. registrars, curators, ‘look-up only’ staff), and can be varied for individuals or groups dependent on the type of records being viewed.

eMuseum allows the creation of multiple interfaces or “profiles” each of which can provide access to different levels of data that are displayed in eMuseum. Each profile can have a login and password for secure access. There is an integrated Administrator account. The MyCollection feature in eMuseum allows users to create accounts and save the results of their searches. They can elect to either share or keep their “collections” private. User accounts, including passwords, are stored in the eMuseum application database.

User groups

In TMS, security control over access permissions to view/edit/add/delete data is available down to the individual field level, and control over access to system functions (e.g. maintain authority files, update locations) is similarly comprehensive. Such permissions can be assigned to individual users (e.g. database administrator, collection manager), or distinct groups of users (e.g. registrars, curators, ‘look-up only’ staff), and can be varied for individuals or groups dependent on the type of records being viewed.

eMuseum also supports roles based security, which enables administrators to configure viewable and searchable fields on a role-by role basis. Administrators can also configure viewable records based on field values.

Visitor profiles

Visitor profiles can be created in TMS as permitted by a museums' total licenses and their TMS security settings. Additionally, eMuseum provides read-only access for public access. eMuseum allows the creation of multiple interfaces or “profiles” each of which can provide access to different levels of data that is displayed in eMuseum.

Installations

TMS is a client/server application and the software can be installed on any number of client computer workstations with access to the server. Licensing is based on the number of concurrent user licenses acquired by the museum.

Audit trails and/or edit history

TMS includes a built in audit trail that captures information on a set of predefined fields in the object module. The information captured includes the date a change was made, the login ID of the person who made the change, the table name, the column name, the old value, and the new value. Users also have the option to enter explanations and approvals. In addition, a complete location history audit trail is maintained for each object and component of an object.

For advanced auditing, TMS Audit Manager is available as an add-on product and it provides client-configurable tracking of changes to data residing in the TMS database – as granular as a single

column to as widespread as virtually every column in every table in the TMS schema. Clients may configure which columns to audit; the application will record the date/time that the client began/ended auditing for a given column.

Offline access

TMS does not require the internet to access data within the program implemented in a Local Area Network. Internet connections would only be required if TMS were installed and hosted in the cloud, but a cloud implementation is not required.

Privacy features

Access to the names of lenders and donors, who wish to remain anonymous, can be controlled by individual user accounts.

Departments can be created to control privacy to various areas and modules, based on configurable user security group profiles.

TMS Package Explorer folders offers varying forms of privacy. Data packages saved in the Public folder are automatically made available to all TMS users. The Web Access folder contains data intended for sharing with the public via a website. The Shared folder contains packages a user wishes to share with a subset of TMS users. Additionally, packages of records can exist in more than one folder, and owners of a package can grant (or deny) access to his/her packages in folders other than Personal. Only the owner of the package and system administrators posing as a user have access to packages in the Personal folder.

Data migration and stability

Import formats

TMS supports the following import formats: .CSV, .txt, .XML, .xls, .xlsx, ASCII.

Export formats

TMS supports the following export formats: CSV, Excel, PowerPoint, Plain Text (ASCII), Rich Text (.rtf), PDF, XML and/or HTML files. XML can be structured to follow specific data formats including MARC XML and RDF XML. eMuseum provides data extraction APIs in JSON, XML and RDF XML formats for all types of published collection content.

Backups

TMS and eMuseum backups are integrated into SQL server or Oracle and may be configured at the time of installation. A mass storage device or tape drive with appropriate backup software is required.

Standards and schemas

Metadata schemas

- Dublin Core
- LIDO
- CDWA
- EAD
- MARC

TMS data schema was designed specifically to accommodate the extension into the CIDOC CRM data model.

Data content standards (cataloguing rules)

- LIDO
- CCO
- VRA Core
- CHIN Data Dictionaries
- Object ID

TMS by design, is highly configurable, allowing clients to adapt the system to support their preferred standard.

Vocabulary standards

The Getty Art & Architecture Thesaurus (AAT) and the Getty's Thesaurus of Geographic Names (TGN) are integrated with TMS. Optionally, TMS can be delivered with Chenhall’s Nomenclature thesaurus and with the Species 2000 thesaurus. In addition, custom and local thesauri can be added using the TMS Thesaurus Manager.

Local terminology lists

In TMS all authority controlled fields, such as Classification, Object Status and Accession method, are client configurable. In addition, custom and local terminology lists can be added using the TMS Thesaurus Manager and Flex-fields.

Accreditation

TMS is certified Spectrum compliant.

Data entry and content

Media upload/linking

TMS has a Media module, where any number of media records of any size and file type can be managed and linked to corresponding object records, events, or activities. Media records can include physical media (slides, negatives) and any type of digital file (images, video, text documents, PDF, HTML, Excel, etc.). TMS supports drag and drop functionality for easy adding of new media.

Media formats supported

An extensive range of file types can be linked to records in each TMS module.
Word processing files include:

- .doc
- .docx
- .wpd
- .txt

Image files include:

- .jpg
- .gif
- .tif
- .tiff
- .wma
- Windows bitmap (.bmp)
- Leadcompressed bitmap (.cmp)
- Flashpix (.fpx)

Video formats include:

- Microsoft streaming media (.asf, .wm, .wma, .wmv)
- Moviefile (.m1v, .mp2, .mpa, .mpe, .mpeg, .mpg)
- MP3 (.m3u, .mp3)
- Quicktime (.mov, .qt)
- Real Audio (.ram)
- Video file (.avi, .wmv)

Audio files include:

- .aif
- .aifc
- .aift
- .au
- .mp3
- .snd
- .wav
- MIDI (.mid, .mid, .rmi)

Other file formats include:

- Portable Document Format (PDF)
- Excel spreadsheets (.xls, .xlsx)
- Streaming data
- Animation files
- 3D imaging files
- CAD files

Any digital file format can be supported in TMS and viewing the file formats are dependent on having access to the software to open the file format.

Data entry features

TMS includes a data entry form designer to configure any number of data entry forms. In TMS, there are three main types of Data Entry fields:

- **Text Fields** - Type data directly into the field, or enter data via a list of terms in the linked Thesaurus.
- **Drop-Down Fields** - have a list of terms defined by your institution; to enter data in these fields, click the down arrow and select a term from the list that appears.
- **Control Fields** - Data is entered via various assistant screens. Control fields include HTML text entry fields and Date fields.

When a group of records share the same text entry, users need only input the entry once, in one of the selected records. The user can then batch copy-paste the entry into the remaining records in the group. This is done via the "Copy to entire selection" function. Users can also drag-and-drop any content from outside of TMS into the Text Entries field.

Copy and paste

Yes. Users may use the copy function to create new records with the data in tables selected by the user. TMS also allows users to copy data in one field and paste it into another field.

Search and replace

Yes. TMS includes a search and replace utility that can run against the entire set of Object records in a database, or against a select group of records (via current selection). This utility allows you to make bulk changes to certain text fields in Object records.

Spellcheck

Yes. The TMS Spell Check tool is available directly within the text entry window. Users can run the Spell Check without having to go to the Tools menu (outside of the Text Entries field). This makes spell-checking more convenient and saves time.

Bulk cataloguing

Yes. TMS provides many options for bulk cataloguing. Sets of data, common expressions, can be saved as Function Keys turning the keyboard's F-keys into commonly used expressions for cataloging. A record in most modules can be copy/pasted intelligently (include/exclude options). The Objects module allows saving a record as a Template so any part of the record can be pre-filled (common credit line, common artist/make, common location, common dimensions…) during batch accessioning. Also, data can be imported using a variety of tools. TMS includes an Object Importer that works in conjunction with Excel spreadsheets or XML files for rapid data entry and batch import. Within the Bibliography module, users can batch import bibliographic records from a wide range of publically available Z39.50 servers. A Constituent clean-up/merge tool also can import Artist/maker records from a ULAN source, to capture all known variants of a name for example.

Batch edit

Yes. TMS' Search and Replace tools also allows users to make bulk changes to certain text fields in Object records.

Batch location change

Yes. Location changes can be performed on groups of objects from within searched object sets, saved lists (object packages) or a number of other parameters. Barcode Manager is a TMS plug-in program to simplify location changes and batch movement of objects.

Duplicate record search

Yes. Accession numbers are unique.

Template record

Yes. Users may create and copy templates based on a collection or project profile and pre-populate the selected fields.

Date selection and formats

Yes. ISO date format and datetime dates are supported. TMS will convert any dates entered in a valid ISO date format into a consistent date standard format. Pop-up calendars are available on most date fields.

Mandatory fields

Yes. TMS supports a mandatory Object ID field. Outside of the Object ID field, TMS does not enforce mandatory fields by default.

Others

No response.

Spreadsheet editing view

TMS provides configurable List Views, which can be exported to spreadsheets for editing.

Geographic mapping

Customizable Dataviews in TMS can display geographic information on a map. eMuseum can be customized to display geographic information on a map.

Multilingual fields

TMS is fully Unicode compliant and supports multilingual cataloging.

Barcoding

TMS Barcode Manager is an additional product designed to work with TMS to facilitate efficient tracking of locations and movements in TMS. TMS Barcode Manager uses standard barcoding hardware or RFID equipment, and automatically assigns unique barcode identifiers to all objects, components, locations, and crates in TMS. Barcode Manager provides full scanning management of movement and inventory, and allows for batch processing using barcode or RFID.

Labelling

Labels can be printed using customizable reports. Additionally, a user can enter, edit, and view record data in Label Copy display mode. The Label Copy view in the Objects module displays summary information about a single record, including, but not limited to, Department, Title, Artist/Maker, Medium, Dimensions, Object Number, Credit Line, Description, etc. This information can be customized within the List View Designer, which comes standard with TMS. Users can then export this Label Copy data view into Microsoft Word or Microsoft PowerPoint for further display and/or printing. Users can also generate a Fact Sheet report from the Label Copy screen.

Search and reporting

Types of search supported

TMS supports pick list, wild card, and range searching in a number of Query options including a quick find, Query Assistant, and Advanced Query. Quick Find and Query Assistant (a guided fielded search) are the most common search tools.

Boolean queries

Yes. Advanced Query allows users to build complex queries using Boolean operatives, which can be saved and reused.

Query any field

Yes. The Query Assistant and Advanced Query allows users to search on any field in the database.

Sort query results

Yes. The results from a query can be sorted by various fields defined by the user.

Saving search results

Yes. Users can save query results as a Package. Packages in TMS are ordered lists that can be shared, saved, and locked. A Package can be modified (sorted, added to, etc.) by users who have rights to that particular package.

Filter search results

Yes. Search results can be filtered by refining the results of a query by any field in the Query Assistant or Advanced Query tools, both of which can be configured to include the desired fields.

SQL-based search

Yes. TMS is available with Microsoft SQL Server DBMS.

Export search results

Yes. Search results can be exported in any of the following formats: CSV, Excel, PowerPoint, Plain Text (ASCII), Rich Text (.rtf), PDF, XML and/or HTML files.

Free-text (Google) searches

Yes. TMS can be configured to include a Google-type search. eMuseum includes a Google-type search interface.

Search result views

- **Standard Data Entry** - standard data entry forms
- **Label Copy** – standard Dataviews; customizable Dataviews that support full HTML encoding and CSS styling and can be designed to include any information in TMS. Dataviews can be created using the free designer tool distributed with TMS. An unlimited number of Dataviews can be created.
- **Light Box** – displays thumbnail images and object numbers.
- **List** – standard lists; and customizable Listviews that can be designed to include any information in TMS, a free designer tool is distributed with TMS. An unlimited number of Listviews can be created.
- **List with Images** – displays a thumbnail image along with basic catalog information.
- **Hierarchy** – displays all related records.

Configurable data entry forms for multidisciplinary cataloging can be created using the Form Designer, a free tool distributed with TMS, which allows users or administrators to create specific cataloguing forms for multiple disciplines in the Objects module, as well as any curatorial forms, registration forms, and forms for researchers.

Multilingual searching

TMS is fully Unicode compliant and supports searching on multilingual characters.

Report styles included

TMS includes a runtime version of Crystal Reports, the industry standard reporting tool and almost 200 standard reports. Standard reports exist in all modules and include standard forms for museum activities. TMS also supports SQL Server Reporting Services and exports of Dataviews and Listviews directly to CSV, Excel, Word, PowerPoints, etc.

Report customization

Custom Reports can be created using Crystal Reports Standard report writing software, which can export to standard sharing formats such as Microsoft Word, PDF, and Excel, and Gallery Systems offers training on report writing. Custom reports can also be created using Microsoft SQL Server Reporting Services.

Report program

Crystal Reports and SQL Server Reporting Services. TMS also supports exports of Dataviews and Listviews directly to CSV, Excel, Word, PowerPoints, etc.

Museum functions

Collections management function overview

The Museum System (TMS), is a sophisticated, easy-to-use relational database application designed specifically for collections, content, media, exhibition, and loan management. TMS is comprised of 10 interrelated modules, with supporting functionality for entering and tracking all collections data and management activities.

The objects and works in the collection are tracked in the Objects module. The Objects module tracks the following data: Acquisition, Accessioning, Inventory Control, Location and Movement Control, Cataloguing, Conservation Management, Rights and Reproduction, Insurance Management and Valuation Control including Appraisals, Deaccession and Disposal.

Registration

TMS supports key registration processes, as demonstrated by a robust Registration menu available within an Object record. The menu includes:

- **Location and Movement** - Tracking the location of an object (in a gallery, in storage, etc.).
- **Status Flags** - Object statuses specific to your institution, such as "Needs Photography" or "Damaged."

- **Components** - Individual parts of an object, such as a cup and a saucer or separable parts of an ethnographic piece (e.g., mask).
- **Valuation and Insurance** - Valuation(s) of an object for insurance or other purposes.
- **Incoming** - An object coming into your institution for acquisition consideration, or some other temporary reason.
- **Accessioning** - The process of accessioning an object.
- **Deaccession and Disposal** - The process of deaccessioning an object and tracking the use of proceeds (for that deaccessioned object).
- **Rights and Reproductions** - Copyright, non-exclusive licenses, and other contracts relating to reproductions of the object.
- **Alternate Numbers** - Any former or additional numbers for an object (such as temporary deposit numbers)
- **Handing Notes** - Notes and instructions pertaining to the packing, storing, and handling of an object.
- **Accession by Lot** - Tool for accessioning groups of objects as a 'lot.'

Acquisitions

The entire acquisitions process is managed through the Incoming and Accessioning areas of the TMS object record. By default, this includes fields for recording information about the depositor; incoming purpose; anticipated custody dates; shipping information; method of acquisition; approval dates; acquisition source notes and contract notes; acquisition justification; price, and other critical areas associated with acquisition and accessioning. TMS provides support for accession lot management that allows for control of groups of objects where only part of the group may ultimately be accessioned.

Inventory management

TMS includes comprehensive functionality for managing physical inventory and spot checking. Information recorded includes the location of the object, the date inventoried, by whom the inventory was conducted and the status of the inventory.

Internal tracking

Locations can be defined as either 'internal' i.e. internal to your organization or 'external' – physical sites other than your organization. Location transactions of different types can be performed in TMS: historic, current and future, scheduled moves. Location recording is granular and carried out at a component level, allowing the recording of different location information for the different components of an object, including 'accessories' as well as 'parts of an object'. For each transaction the name of the person carrying out the transaction is automatically recorded, as is the date and time of the transaction; it's purpose and, if required, the name of the person carrying out the physical move of an object and the authorizer of the move. A complete location history audit trail is maintained. Future moves can be scheduled and reminders set-up to automatically notify staff of pending moves.

External shipments

TMS has a Shipping Module, which is linked to the Objects, Exhibitions and Loans modules and facilitates the shipping process. It manages dates, related constituents, origin, destination, packing lists, crates, conveyances, shipping forms and related materials, among other information.

Cataloguing

Object records are used to capture all catalogue information for an object. Multiple object record 'views' are available. The object data entry form includes fields for recording: Object Number, Department, Classification, Object Name, Title, Object related dates (date types and precise search dates can be defined), Individuals and Institutions related to object records characterized by relationship type e.g. 'artist', 'donor', maker, etc., Object location, Medium, Dimensions, Description, Overall Object Condition (derived from a separate, structured Conservation record), Label Text, Curatorial Remarks, Provenance, Published References, Copyright information and restrictions, Geographic information, Historical attributions, and many more.

Configurable data entry forms for multidisciplinary cataloging can be created using the Form Designer, a free tool distributed with TMS, which allows users or administrators to create specific cataloguing forms for multiple disciplines in the Objects module, as well as any curatorial forms, registration forms, and forms for researchers.

Conservation

Comprehensive condition and treatment information recording is supported in TMS. The Conservation screens support the data entry and display of the entire conservation history of an object or site. Conservation data is organized in a chronological hierarchical tree: Surveys and relevant Line Items, with icons depicting each line item. Surveys include the following information: Survey Type (for example, incoming review, damage report, general survey), Duration (days), Survey and Report Dates, Overall Condition (appears in data entry screen), Examiner, Overall Testing and Analysis, and Remarks (i.e., handling instructions, storage requirements). Line Items include the following information: Attribute Type (type of action being performed such as fiber analysis, cleaning or fumigation), Brief Description, Statement, Proposal, Treatment Report, Duration (days), Date Completed and "Action Required" and "Action Taken" check boxes. Media files relevant for conservation may be linked, which may include Before/After photos, Infrared or X-ray photography or a word-processed Condition Report.

Curatorial research

There are several options for documenting curatorial research. "Text Entries" which is a highly flexible, repeatable notes field can be used for this purpose. Text Entries can be assigned a Type, a Purpose, a Status, a Date and an Author and includes a Free Text Field that supports HTML

formatting. Unlimited numbers of Text Entries can be created per record. Another option is to create Media records for the research files and link them to the appropriate records.

Publications and printed material

TMS has a Bibliography Module, which records all reference material and documentation related to the collection and can be linked to corresponding records.

Rights management and reproduction

Copyright details maybe tracked on the object level (for reproduction of images) or in individual media records (for photo rights & reproduction requests). On the object level, the Registration menu includes a Rights and Reproduction screen which records the following details: when an Agreement was sent, received and signed, types of rights granted, contract number, copyright registration number, copyright restrictions and credit line for reproduction. The Media module was designed to handle "parent" and "child" renditions, allowing for tracking of multiple formats of a single image (transparency, prints of various sizes, etc.).

Risk management and valuation

The Valuations utility is available within the Objects Module, and maintains full valuations histories that include data on the valuation date, purpose, currency, etc. The Events Module can be used to maintain Risk Management strategies. Objects and Constituents can be linked to a Risk Management event, allowing staff to track Risk Levels for particular objects and collections and related instructions. All documentation can be stored as media for quick reference, export and editing. The Insurance Module can be used to track insurance policies.

Exhibitions

TMS has an Exhibitions Module to manage the entire exhibition planning and execution process. The Exhibitions Module is tightly connected to the Loans and Shipping Modules to seamless facilitate coordination of all aspects of an exhibition including traveling exhibitions, venues, insurance and indemnity. Additionally, the reporting capabilities of TMS allow for efficient reporting on conservation information, object labels, etc.

Loan management

TMS has a Loans Module, which can manage the entire loan process and all related data. For both Incoming and Outgoing loans, object data can be stored and edited within the loan, constituents can be linked as lenders and borrowers, and digital files of loan-related material can be stored. The status of all parts of the loan process can be comprehensively maintained in the loan record. The Loans

module is linked to the Exhibitions and Shipping modules to facilitate the management of these activities.

Deaccessions

TMS allows for thorough tracking of deaccessioning processes through its deaccession utility, wherein objects can be flagged for consideration for deaccession and, later, tracked as deaccessioned objects. All deaccessioned object records remain in the TMS database unless explicitly deleted. Access to deaccessioned objects can be controlled by updating their 'Department' to one specifically designated to hold such objects.

Digital asset management

TMS offers sophisticated digital asset management in the Media Module where records can be created for digital files (images, moving images, web pages, word processing documents, etc.) or physical media objects (photographs, videocassettes, etc.). An unlimited number of media files may be linked to records in TMS modules. Related information: copyright, selected digital file metadata, circulation restrictions, quality, etc. is recorded in the Media module. TMS can read and index the contents of text-based media files, the contents of which are also fully searchable. Metadata can be inserted into and extracted from media files. The Media module additionally tracks physical media such as negatives, transparencies, etc. and can track circulation as well copyright and reproduction data. Copyright status and terms may be tracked for an object or for any media file.

Additional features and functions

- Index and search Word and PDF documents linked to TMS records.
- Automatically ingest media metadata into linked TMS media records, enabling searching from within TMS on e.g. geotag data; camera type; data and time.
- Write TMS object metadata into media files.
- Control access to the names of lenders and donors, who wish to remain anonymous, by individual user account.
- Store transcriptions of text documents, enabling images of written documents e.g. scanned letters to be searched.
- Add media, including image files, to TMS records via drag-and-drop.
- Add Thesaurus Terms to records via drag-and-drop.
- Create user-defined forms, incorporating record navigation via hyperlinks and integration with Google Maps.
- Export user-defined forms into Word and Excel.
- Create user-defined 'list views', which can be exported into Excel.
- Create user-defined object data entry forms.
- Create object records via integrated Object Importer.
- Batch create Media records via integrated Media Loader.
- Multilingual cataloguing.

- Thesaurus for data entry - As standard.
- Thesaurus for retrieval - As standard.
- Screen designer - As standard.
- Extensible data structure - As standard.

Updated information (July 2018)

The TMS Suite

Gallery Systems provides The TMS Suite, a configurable set of native-browser based applications that all share the same database. The TMS Suite is designed to support collections management needs in the most efficient and cost-effective way for institutions of varying sizes and types.

The TMS Suite includes:

TMS Collections

TMS Collections is the foundation and centerpiece of the TMS Suite, combining robust cataloguing features with web accessibility, and enabling collections management and collaboration, using data managed in one central location. TMS Collections is intuitive and accessible for museum accessioning, cataloging, archiving, exhibitions/loans/shipping management, location and movement, inventory, and insurance and valuation.

TMS Cataloguer

An alternative to TMS Collections, TMS Cataloguer is a streamlined, easy-to-use collections management system that focuses on essential cataloguing. Developed for smaller museums or institutions with simpler workflows, TMS Cataloguer is easy to learn, comes at an affordable price point, and is provided as a hosted product accessible in a web-browser, so there are no IT requirements.

eMuseum

eMuseum is a web publishing application that accesses the TMS Suite shared database and allows dynamic publishing of information to an organization's website, Intranet, and kiosks, allowing users public access to museum collections.

TMS Conservation Studio

TMS Conservation Studio provides conservators advanced functionality to create and manage conservation reports, surveys, projects, and all conservation department details, enabling users to

track light levels, annotate images on mobile devices for access from anywhere, collaborate with peers, and much more.

TMS Media Studio

TMS Media Studio provides users with efficient and advanced tools for digital asset management, including streamlining media workflow, downloading, annotating, and media sharing. Media Studio gives users outside of Collections Care secure access to data and media contained in the collections database, in an easy-to-use interface.

Qi by Keepthinking Ltd. - Profile

Note

This profile was completed by the software vendor at CHIN's request and does not reflect the views or opinions of CHIN. It is presented for information only and does not indicate approval or

accreditation by CHIN. Inclusion of specific products does not mean that CHIN recommends the software, but that members of the community expressed interest in learning about these products.

This information was accurate as of January 2018. For more information or to request updated information, please contact the vendor directly.

Product name

Qi

Vendor name

Keepthinking Ltd.

Vendor overview

Website URL

www.qi-cms.com
www.keepthinking.com

Head office

43 Clerkenwell Road
London EC1M 5RS
United Kingdom
Year founded: 2003
Telephone number: +44 20 7490 5337
Email: info@keepthinking.it
Contact person: Cristiano Bianchi

Product overview

Product description

Qi is a web-based collections, information and asset management solution that allows organisations of any size to manage, publish and share their collection and any other content. Qi can be easily customised to adapt to any type of content and to serve it to diverse audiences, across any number of channels and platforms. Qi is designed for ultimate flexibility, collaboration, ease of use and speed. Qi is Spectrum compliant from the onset and supports every other major international standard such as CDWA, RDA, ISAD(G), MARC 21 and more, meaning that any type of collection can be

accommodated. Qi is geared towards management as well as publication and sharing of information, integrating multiple repositories and removing the need for middleware.

Disciplines supported

Any museum, archive and library collection is supported, including art, architecture, archaeology, natural sciences, etc.

Product launch date

2011

Product history

Qi generated from the 16-year experience of Keepthinking to design and develop award winning collections online for museums and archives.

Future development

Fully integrated e-commerce and ticketing.

Demo version

Contact us at info@keepthinking.it.

Support

Support methods

Email, telephone.

Support language(s)

English

Support availability and hours

8 a.m. to 12 a.m. UK time.

Support fees

Contact us at info@keepthinking.it.

Client support network

Not applicable.

Training

In person and remotely.

System updates and maintenance

New release twice a year in April and October.

Cost

Pricing

Contact us at info@keepthinking.it.

Maintenance costs

Contact us at info@keepthinking.it.

Additional fees

Data conversion is chargeable based on complexity.

System specifications

Operating systems supported

All, as Qi is a web application.

Underlying database

MySQL

Platform(s)

Mac, PC, Linux, Android and iOS tablets.

Hardware requirements

Regular Mac, PC or tablet.

Staff requirements

No requirement for technical staff.

Plug-ins and/or modules available

Integration with other systems possible with Qi REST API.

Third-party requirements

Not applicable.

Interoperability

Native REST API and integration with Elasticsearch out of the box.

Accessibility

Compliant with W3C WAI Accessibility Level AA.

Customization

Qi is fully customisable, with the ability to create new tables and fields directly by customers.

Web integration capabilities

Cloud functionality

Server location
: Anywhere. We prefer to use Amazon AWS, but flexible.

Security protocols
: HTTPS over SSL.

Typical or average uptime
: 100%

Back-end maintenance procedures and downtime
: Scheduled, every 3 weeks.

Browsers supported

All latest three versions of all standard compliant web browsers.

Web-based access for data entry

Full

Web publishing platform

Museums Sites www.museumssites.com, which can be customised and extended to suit any requirement.

Linked open data functionality

Full support, including Getty, Library of Congress, WorldCat, Geonames integration (among others). JSON REST API and Elasticsearch for publishing and ingesting data from other sources.

User groups and security

User profiles

All access is managed at group level. Each user can be a member of one or more Groups.

User groups

Granular access to each table and field in the system, read/write and approve.

Visitor profiles

Read-only profile can be created.

Installations

Not applicable (we don't understand the question).

Audit trails and/or edit history

Full history of changes is recorded and available for every content type.

Offline access

Not applicable.

Privacy features

Not applicable (we don’t understand the question).

Data migration and stability

Import formats

- XML
- CSV
- Excel
- SQL
- JSON

Export formats

- XML
- CSV
- Excel
- SQL
- JSON

Backups

- SQL

Standards and schemas

Metadata schemas

- CDWA
- Spectrum
- CHIN
- ISAD(G)
- DACS

And any other.

Data content standards (cataloguing rules)

No response.

Vocabulary standards

- Getty AAT
- ULAN
- TGN
- CONA
- Library of Congress Subject Headings

Any other authority with open/closed API or export format.

Local terminology lists

Any number of local authority lists is possible and can be extended with external vocabularies.

Accreditation

Spectrum compliant (since 2011).

Data entry and content

Media upload/linking

Integrated digital assets management system.

Media formats supported

Over 400 file types accepted.

Data entry features

Copy and paste
Yes
Search and replace
Yes
Spellcheck
Yes
Bulk cataloguing
Yes
Batch edit
Yes

Batch location change
Yes
Duplicate record search
Yes
Template record
Yes
Date selection and formats
Yes
Mandatory fields
Yes
Others
No response.

Spreadsheet editing view

Yes

Geographic mapping

Yes

Multilingual fields

Yes

Barcoding

Yes

Labelling

Yes

Search and reporting

Types of search supported

Boolean queries
Yes
Query any field
Yes
Sort query results

Based on any result field.
Saving search results
Yes, as packages.
Filter search results
Yes, searches can be nested.
SQL-based search
Not necessary.
Export search results
Yes, in XML, CSV, Excel and JSON.
Free-text (Google) searches
Yes
Search result views
Yes

Multilingual searching

Yes

Report styles included

Yes

Report customization

Yes, using Word templates or SQL queries.

Report program

Integrated

Museum functions

Collections management function overview

No response.

Registration

Yes, Spectrum compliant and fully customisable.

Acquisitions

Yes, Spectrum compliant and fully customisable.

Inventory management

Yes, Spectrum compliant and fully customisable.

Internal tracking

Yes, Spectrum compliant and fully customisable.

External shipments

Yes, Spectrum compliant and fully customisable.

Cataloguing

Yes, Spectrum compliant and fully customisable.

Conservation

Yes, Spectrum compliant and fully customisable.

Curatorial research

Yes, Spectrum compliant and fully customisable.

Publications and printed material

Yes, Spectrum compliant and fully customisable.

Rights management and reproduction

Yes, Spectrum compliant and fully customisable.

Risk management and valuation

Yes, Spectrum compliant and fully customisable.

Exhibitions

Yes, Spectrum compliant and fully customisable.

Loan management

Yes, Spectrum compliant and fully customisable.

Deaccessions

Yes, Spectrum compliant and fully customisable.

Digital asset management

Yes, Spectrum compliant and fully customisable.

Additional features and functions

No response.

Qi by Keepthinking Ltd. - Evaluation

About this evaluation

This evaluation was performed on January 25, 2018 with a representative from Keepthinking Ltd. It was evaluated by five members of the museum community and reflects their personal opinion. These evaluations were based on a set list of tasks in a limited period of time. It is always recommended that you request a demonstration of any product in which you may be interested based on your specific requirements.

Evaluator ratings

The following table shows the ratings given to this software by members of the museum community. To understand what these ratings mean, please refer to our Scoring System & Evaluation Guide.

Each rating given is scored out of a maximum of five points. The larger the Standard Deviation number, the wider the range of scores for that task.

Task	Average	Standard Deviation
Online data entry	4.0	0.7
Publish a record to the web	4.0	0.7
Set user permissions and groups	3.6	0.9
View audit trails or change log	3.6	0.5

Task	Average	Standard Deviation
Import data	3.4	0.5
Export data	3.8	0.8
Create a local terminology list	3.8	1.1
Upload or attach images and files	4.2	0.8
Catalogue an object	3.6	0.9
Batch modify a set of records	3.8	0.8
Multilingual capabilities	3.2	0.8
Customize a catalogue entry page	3.8	0.4
Create a template record	3.4	0.5
Generate and/or build a report	2.4	1.3
Perform basic search	3.4	0.5
Perform advanced search	3.0	0.7
Browse records	3.4	0.9
Create an exhibit	3.4	0.9
Enter condition report information	3.6	0.9

Evaluator comments

The following comments have been provided by our evaluators after they rated the performance of each task. These are selected comments drawn from the “Additional Comments” section of the evaluation form.

- I wonder what training time might be – how complex. Qi web open source system is a somewhat foreign concept to me as I am use to more straightforward and somewhat restrained CMS systems. Appealing but intimidating;
- Everything within Qi is configurable and can really be adapted to the needs of each specific institution;
- Quick easy publishing on line just by saving and approving – no extra steps – simplifies process yet guarantees quality control.
- Information Management system in which they developed a Collection Mgmt. System
- Apple and Android Apps
- The load of 3000 records to view took several seconds, so what would it be for a search with more than 10 000 records
- The collections management interface seems to be easy to use.
- The various modules and buttons are easy to locate.
- The application uses a web browser; it is possible to open several windows or tabs at the same time (for example, a list of objects can be opened in one tab, and in the other tab, the

description sheet for a specific object, and in another tab, a sheet that contains information on the institution.)
- User interface reflects the web-based nature of the program.
- Excellent backup with data being stored on primary and secondary servers that are geographically removed from each other.
- Web-based only does mean that you might have challenges if you lose web access during a natural or human disaster.

Argus by Lucidea - Profile

Note

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accreditation by CHIN. Inclusion of specific products does not mean that CHIN recommends the software, but that members of the community expressed interest in learning about these products.

This information was accurate as of January 2018. For more information or to request updated information, please contact the vendor directly.

Product name

Argus

Vendor name

Lucidea

Vendor overview

Website URL

www.lucidea.com/argus

Head office

Suite # 1115
13560 Maycrest Way
Richmond, British Columbia
Canada V6V 2W9
Year founded: 1988
Telephone number: (604) 278-6717
Fax number: (604) 278-9161
Email: sales@lucidea.com
Contact person: Mark Maslowski

Canadian/North American office

Suite # 1115
13560 Maycrest Way
Richmond, British Columbia
Canada V6V 2W9
Year opened: 1988
Telephone number: (604) 278-6717
Fax number: (604) 278-9161

Email: sales@lucidea.com
Contact person: Mark Maslowski

Product overview

Product description

Argus is a flexible Web-based collections management system platform for museums and galleries, built to enhance curation, and to significantly expand outreach and access via the Web, enriching the experience for both in-person and virtual visitors. It provides for standard museum collections management processes as well as for requirements that are unique to each institution. Unlike traditional collections management platforms, fully Web-based Argus enables museums to easily offer public portal access to objects and exhibits and provide more in-depth documentation about each artifact – delivering content in context. Clients leverage efficient purpose-built workflows with minimal training required, and rest secure in the knowledge that Argus is built on sustainable, cutting edge technology that will remain relevant as collections and requirements grow.

Access from PCs, Macs, and mobile devices

Since Argus is completely web-browser-based, users can access it from any desktop or mobile device without having to install special software. Among other things, this means that you don't have to install or update each desktop with special software, training time is reduced, and most importantly, museum staff members have the flexibility to work in the system while they do their daily work in galleries, warehouses, or other offices (e.g., doing inventories, updating the condition of objects, mounting exhibits, etc.) using the same interface they would use if they were at their own desks. And if it is more convenient to work using a tablet or a smartphone than a PC or Mac, they can do so.

A complete system

Unlike some other systems, Argus is "complete". It includes all the modules needed to describe and maintain your collection as well the search-only Portal and tools to adapt the application to your ever-changing needs.

Digital files of all types accommodated

Unlike other systems, when an image is attached to a record, Argus renders the associated derivatives (e.g., thumbnails, images for reports, images for alternative displays) on the fly. This saves on disk storage because the image is only stored once. It also saves staff time because you only have to create one image file.

In addition to adding images to catalog records to support online viewing, images can be added to process-related records (e.g., conservation, acquisition, lexicon, etc.) in support of specific processes.

When text-based documents (native digital or OCR'ed) are attached to records, the full text of those documents is searchable. This is useful for retrieving information only found in condition reports, deeds of gift, oral history transcripts, and other important documents related to the collection.

Data entry screens for various levels of authority

Argus can be implemented with "Views", which you can think of as "custom data entry screens" where you can control not only which fields are viewable and editable, but also the layout, and any help text. Our clients use this feature to provide different staff user groups with screens specific to their tasks, and also to support users who may need more restricted or guided access when working with the data, such as volunteers or interns. Custom data entry screens means less training time, greater consistency in data entry, and maximum efficiency in completing data entry tasks.

Search-only access

The read-only Portal can be implemented in multiple ways. Some customers implement it for in-house use, providing access by other departments (e.g., education; marketing and communications) so that they can do their own research; other customers implement it for public access. In either case, the Portal is highly configurable and includes features that make browsing and researching easy for users.

The Argus portal is seamlessly integrated with the backend. You specify which fields and images will be accessible online, you can highlight different collections or subsets of collections, and the best part is that there is no need to export or "publish" data online; or store your data in a separate database. Instead, Argus dynamically searches the data in your catalog and updates and filters information in real-time as you add, edit, or delete records.

Customers who use the Portal for public access have told us that the statistics they gather from the Portal help them understand what their users browse and search. They use those statistics to make decisions related to events, exhibits, and processing their collection backlog.

Search capabilities

With Argus you can search easily and quickly. There are multiple ways to search, including Google-like searching, advanced searching with Boolean operations, saved search strategies, and saved lists.

You can search across many fields, or all fields, or on a specific field. You can search precisely or broadly, and you don't have to know field names. When you retrieve more records than you want to review, you can limit the search by simply filling in a form. And you can change search options on the fly.

Saved lists are popular with customers because you can create a list of records to use for a specific purpose (e.g., candidates for an exhibit; objects that need conservation review; objects that need to be moved to a different location, etc.) and save the records in an identifiable list for future use.

Reports

Argus has an easy-to-use report writer that is used to create reports, export data in CSV format, and create ad-hoc reports. In addition, Crystal Reports are used for "forms" such as loan agreements, Deeds of Gift, and receipts. Argus comes with a set of predefined reports, and new reports can be added. There is no limit to the number of reports or forms that can be created.

Import and export capabilities

Argus also comes with an Import/Export user interface that guides you through importing data or exporting data, without IT or vendor assistance. Data can be easily imported from a spreadsheet. Standard export formats are available, including CSV and XML.

Capabilities for working efficiently

Argus has multiple capabilities that help staff save time and work efficiently. For example:

- Data entry screens can be specific to your collection, with drop-down lists that use your vocabulary, and fields that are filtered based on collection type.
- Authority tables and the hierarchical lexicon are used to control the terms that are used, standardizing vocabulary and reducing errors in data entry.
- Batches of records and images can be loaded from spreadsheets in support of travelling exhibits and other intake processes.
- Global change tools can be used to add, delete, modify, and change terms in many records (a few or hundreds) with a single operation.
- The Update Locations Wizard helps you record the movement of many objects at once.
- The Assign Objects Wizard helps you to create many object records at the same time and link them to an existing Activity (e.g., accession; loan; exhibit, etc.).
- The Update Activity Wizard helps you copy data values or linked objects from one Activity (i.e., incoming loans) to another (i.e., accessions).

Integrate with other software

Argus also includes a Web Services API (application programming interface) that allows you to integrate Argus with third-party software (e.g., your website; membership software).

Social media integration

Argus' built in social media capabilities enable staff to send links to colleagues and peers, or post information about objects on Facebook, Instagram, Twitter and other social sites—and empower visitors to share information about your collection with their friends.

Search engine integration

Argus can be configured to allow for descriptions of your objects to be retrieved through a third party search engine. Argus' built-in configuration tool makes it possible for Google to index your data; people who don't even know your museum exists will discover you and your collection through Google.

In summary, Argus is a highly configurable and powerful system that will enable you to meet today's challenges as well as those you will encounter in the future.

Disciplines supported

Art, History, Archaeology, and Natural History.

Library and Archives collections are supported through Argus' companion products, SydneyEnterprise and CuadraSTAR Knowledge Center for Archives.

Product launch date

Originally released in the 1980s on a DOS platform, Argus has evolved significantly. Argus was rewritten in its entirety and released in 2012 as a .NET SQL application. New features and enhancements are released every year. The current version is v4.3.3.

Product history

Argus originated as a collections management system. It began with a character-based interface, then moved to a Windows interface, and the current product is a completely Web browser-based product that can be used from PCs, Macs, tablets, and smartphones.

Future development

Our downstream features list currently includes:

- User submitted records/crowd sourcing
- Web services API Phase II – create/update/delete
- Search term highlighting
- Search list anchoring
- Image zoom for Portal

- Search Results Designer

Demo version

We can arrange for guided (hands-on) demos.

Support

Support methods

Customers contact the Help Desk by email or by phone. When appropriate, Help Desk staff may ask to view the customer's desktop or server, to answer a question or fix a problem.

Support language(s)

English

Support availability and hours

Lucidea distinguishes itself through its emphasis on quality support and services to clients. Support is available to organizations that subscribe to our SaaS service or that have software maintenance contracts with us. Emergency support is available 24/7, and the Help Desk is staffed Monday-Friday from 3:30 a.m. through 9:00 p.m. EST, excluding major holidays. Customers are encouraged to contact our Help Desk when they have problems or need information. Unlike some of our competitors, we do not limit the number of support calls that any one customer can make, nor do we limit who within a given organization can contact the Help Desk.

Support fees

Support is provided to all customers that either subscribe to our SaaS service or have software maintenance contracts with us. There are no additional fees for support.

Client support network

No, although customers are encouraged to meet one another at professional meetings and we facilitate this.

Training

Training is included as part of the initial implementation package. Training is recorded and made available to customers. Customers can also order additional training sessions as needed. For additional training sessions, the cost varies based on the number of hours required.

System updates and maintenance

System updates and enhancements are available to all customers that either subscribe to the SaaS service or that subscribe to the Software Maintenance plan. Updates and enhancements are generally released twice a year. Each release includes new features/functionality, as well as any security patches or updates.

Cost

Pricing

Pricing varies based on several parameters, including the number of users supported. There is no charge for search-only users. Both subscription and perpetual license pricing is available. The cost of software maintenance (including support and updates) is included in all subscriptions.

Maintenance costs

Software maintenance is included for institutions that either subscribe to the SaaS service or that run Argus on their own servers using subscription pricing. The cost of software maintenance for perpetual license clients varies based on several parameters, including the size of the license.

Additional fees

Data conversion and implementation services (e.g., configuration, training, custom report building) vary based on the services required.

Each institution must purchase one run-time copy of Crystal Reports (supports printing features).

System specifications

Operating systems supported

See enclosed technical specifications.

Underlying database

Microsoft SQL Server 2008, 2008 R2, 2012, 2014, or 2016.

Platform(s)

PCs, Macs, tablets, smartphones (using browsers).

Hardware requirements

LucideaCore 4.3.3 is an ASP.NET 4.5 based application that provides access to any modern browser through your Intranet or the Internet.

LucideaCore Application Server

The LucideaCore Application Server is where the main functionality of the system resides. All client operations are performed on this server.

- Processor: 32 or 64-bit, four cores
- RAM: 4 GB
- Hard Disk: 80 GB (plus storage for images if applicable)
- Windows 2008, 2008 R2, 2012, or 2012 R2 Server
- IIS
- .NET Framework 4.5
- Option: Oracle client tools (including ODP.NET) to connect to Oracle databases
- Option: Crystal Reports Server to manage reports

Database Server

The Database Server can be one of the following DBMS.

- Microsoft SQL Server 2005, 2008, 2008 R2, 2012, 2014, or 2016
- Oracle 11g (11.2/x64) or 12c (12.2/non-CDB)

Full-Text Indexing features from each DBMS are used to provide full Keyword searching. Features of each DBMS can be used to create automated backups, re-indexing, and re-keywording.

The database server configuration settings in MS-SQL Server or Oracle will allow the user to specify the collation scheme (sort order). The LucideaCore system does not require that any specific collation scheme be selected. For example, if you intend on using Chinese, German, French, or Arabic text in your database, you can choose to sort by any one of these character sets. You can also choose to have case-sensitive, accent-sensitive, kana-sensitive, or width-sensitive collation.

Note: Consult your Oracle documentation for OS version requirements.

Staff requirements

Argus does not require a dedicated member of staff to maintain it. Many of our customers subscribe to our SaaS service, in which case our staff maintains the server/operating environment. For those customers who run Argus on their own server, we recommend that a staff member with some level of experience with systems be assigned to manage the server.

Plug-ins and/or modules available

Argus Premier is sold as a complete package, with all modules included. Argus Standard excludes support for the following: barcoding, site management (archaeology), advanced conservation, search engine Integration and the Web Services API. All of these are Lucidea products.

Third-party requirements

1 Run-time copy of Crystal Reports.

Interoperability

Argus includes a RESTful API.

Accessibility

Argus's Portal is both Section 508 and WCAG compliant.

Customization

Argus is highly configurable. It comes with a Design Suite that enables you to configure the database (adding new fields, removing and/or modifying others), and change the look to match your organization's needs. During initial implementation we configure Argus for customers and train them in the use of the Design Suite. Once trained, customers can either make configuration changes themselves, or contract with Lucidea for changes to their configuration.

Web integration capabilities

Cloud functionality

Argus is 100% web-browser based. Customers can choose to either subscribe to our Software as a Service (SaaS, Cloud-based) or run it on their own servers.

Server location
: British Columbia, Canada and Massachusetts, USA.

Security protocols
: US Data Center is SOC II compliant.

Typical or average uptime
: Over 99.7%.

Back-end maintenance procedures and downtime
: Daily and weekly backups.

Browsers supported

- Chrome 52 or later
- Safari 6.x
- Firefox 47 or later
- Edge
- Internet Explorer 9, 10 or 11

Web-based access for data entry

Yes. Everything is done using a browser.

Web publishing platform

Argus includes a public Portal. Customers decide which records and which fields within records are included in the Portal. They also determine the format of the displays and reports that are available from the Portal.

A Web services API is also available.

Linked open data functionality

This is not currently available.

User groups and security

User profiles

Each user with data entry privileges or application management privileges has a login. Users can be assigned to as many or few groups as needed. The system is designed to support multi-user access, so multiple users can be logged in at once and can be editing at the same time.

User groups

Yes, you can define security/access restrictions for users by groups and create as many groups as needed.

Visitor profiles

Yes

Installations

For self-hosted sites we recommend a database server and an application server. However, if necessary, a single server can be used for both. Argus is accessed by multiple users at the same time. Access is not restricted by workstation.

Audit trails and/or edit history

The program tracks who entered the record and when. It also tracks the last person to edit the record and when the record was last edited.

Offline access

While the system doesn't include features for offline access, it does include easy ways to import and export data. Thus, for example, if a staff member is planning to inventory in a warehouse that doesn't have Wi-Fi, they can export a spreadsheet of data out of Argus, add data to the spreadsheet while inventorying, and then import the spreadsheet data back into Argus, with a batch load that will match and merge the new data into the database.

Privacy features

Record views can be set up to control what can be seen and/or edited by specific users or groups. In addition, the Portal can be configured so that only specific records and specific fields of data are accessible from it.

Data migration and stability

Import formats

Data and images can be imported from spreadsheets in CSV format. Customers can perform imports through the data mapping interface without help from IT or the vendor. Data import services are also available as a service from the vendor. Data imports of legacy data are part of the Argus implementation package. During the data migration, museum staff can decide whether data should have new field types (i.e., changing a text field to a vocabulary controlled or date field), and whether the field will be active or a read-only field.

Export formats

Argus provides exporting capabilities into standard formats such as CSV and XML through the export tool, or additional formats such as Excel through Crystal Reports. Both data and images can be easily exported by museum staff without assistance from IT or the vendor.

Backups

Argus is available as a SaaS (vendor-hosted) solution or as a locally installed (self-hosted) on premise solution. For customers using our SaaS solution, data is backed up daily and weekly. We have data centers in both the United States and Canada. Customers can choose which center they would prefer.

Standards and schemas

Metadata schemas

Argus has a configurable database that enables customer to have exactly the fields they need. As such, customers may have any fields needed in order to meet any metadata schema requirements. Fields are configured as part of the implementation package, and moving forward, museum staff have access to the Design Suite tools which allow adding, editing or deleting fields in the database to ensure the database always matches the customer's requirements.

Data content standards (cataloguing rules)

As above, customers may have any fields they want in order to meet any required standards. In addition, Argus provides flexible workflows configured to meet the requirements of each institution, including configurable data entry screens and help text, and control over tasks and vocabulary terms.

Vocabulary standards

Part of the Argus implementation package includes migrating any vocabulary standard used by the customer in their previous database. New vocabularies can also be imported into Argus. The customer is responsible for any fees for acquiring a new vocabulary or thesaurus. Multiple vocabularies can be used in Argus, including locally developed vocabularies.

Local terminology lists

Yes, local terminology lists are supported. There is no limit to the number that can be created. Fields can be set to draw from specific controlled vocabularies. Argus is fully Unicode Compliant, so it supports any language and character set.

Accreditation

Not applicable.

Data entry and content

Media upload/linking

Media files can be uploaded or linked from an external source. Text-based files become full text searchable when uploaded. Argus handles images in a special way, creating derived images of multiple sizes from a single linked or uploaded image.

Media formats supported

There is no limit on the number of files nor the type of files that can be uploaded or linked in the database. There is also no limit on the number of files or images that can be attached to a single record.

Data entry features

Data entry can be performed through original cataloging, importing records, batch updates, and copying and pasting records. All relevant documentation, images, and media files can be attached to the record.

Copy and paste
: Yes, Argus' copy and paste feature enables staff to copy and paste any portion of an Activity, Object or Party record. Museum staff choose which record they would like to copy as well as which specific fields should be included in the copied record.

Search and replace
: Yes, Argus has a search and replace feature that enables staff to make updates to individual records, groups of records or across the full database.

Spellcheck
: While Argus does not provide spellcheck directly, as a fully browser based system, museum staff can take advantage of browser spellcheck tools of their preferred browser in any language supported by that browser's spellcheck feature.

Bulk cataloguing
: Yes, Argus has an import tool that enables museum staff to import sets of records from CSV, batch update tools to create new records based on other records (such as creating an Accession record from a Temporary Loan record), and a copy/paste record function for creating records.

Batch edit
: Yes, Argus' batch update tools allow multiple records to be edited at once (such as Update Locations, Update Activity, Search and Replace, etc.)

Batch location change
: Yes, Argus' Update Locations tool allows museum staff to move a group of objects to one location or to multiple locations. If you are returning objects to their permanent location, the system can look to the last previous permanent location to auto-populate this data for you. In addition to adding detailed location data for the new location, and preserving the history of previous locations, this update tool will mark the updated location as 'current'.

Duplicate record search

Yes, during imports of data the system will check for duplicate records based on pre-defined unique identifiers. If a record already exists, staff can choose whether the imported data will add to or replace existing data in that record.

Template record

Yes, there are different templates available for different record types, and all templates are can be configured to match customer's requirements.

Date selection and formats

Yes, museum staff can choose which date format is followed. Multiple options are supported. Dates may be typed in or selected from a calendar picker. Additionally, Argus supports named dates, date ranges, and calculated dates (i.e., World War II, 1900-1950, -3 months).

Mandatory fields

Yes, Argus supports mandatory fields, which are defined by the museum staff and can be edited anytime. Unique identifiers (such as Object ID) are recommended as mandatory, but staff may make as many fields as they choose 'mandatory'. Mandatory fields must be filled in before exiting/saving a record or an error message will be received.

Others

Any native digital text based file or OCR scanned files will become full text searchable upon being uploaded to the database.

Spreadsheet editing view

Argus provides the ability to design and modify the layout of the editing view, as well as the display view of a record in order to maximize efficiency for editing and viewing. Within certain batch update tools, the default edit design is similar to a spreadsheet. It is also possible to export data to a spreadsheet, edit it, and import it back in to add to or replace data in existing records.

Geographic mapping

In Argus, a site record can be configured to use Google Maps in order to display geographic information relating to the site. The coordinates for a Site Figure can be configured to represent a point, a line, or a polygon when being drawn on the map. The boundary for a site consists of one or more site figures. If multiple site figures are defined for a single site then each figure will be rendered on a single map.

Multilingual fields

Yes, Argus is fully Unicode compliant, so it supports any character set. This is true both of data entry text as well as for the labels of the fields for both the backend as well as the online collections portal. Multiple languages may be entered into one field if desired, and/or duplicate fields in multiple languages can be available.

Barcoding

Yes, Argus supports barcoding, QR codes and RFID. Argus can generate barcodes based on the pattern museum staff define, or Argus can accept existing barcodes (which can be typed in, scanned in, or imported in). Argus has barcode reports that can be used to print barcode labels. Customer is responsible for acquiring barcoding hardware for scanning.

Labelling

Yes, Argus supports label printing through Crystal Reports. Staff can choose what fields they would like to have as part of their labels, and the report can match to print those fields onto a label.

Search and reporting

Types of search supported

Argus provides five categories of searching: basic, command, advanced, Boolean, saved searching. These types include Google-like keyword, exact, exists, phrase, range, starts with, ends with, greater or equal, greater than, less or equal, less than. Argus can search on 'named dates', for example, searching on a time period such as World War II. Through "Not exists" searches, museum staff can find records that have fields that do not contain data, to support data clean up initiatives.

Boolean queries
: Yes

Query any field
: Yes

Sort query results
: Yes, single or multilevel as per museum staff preference.

Saving search results
: Yes, Argus provides Saved Searches which include saving static lists or search results (and compiled search results lists from multiple queries), as well as saving search queries which provide dynamic results as the collection grows and changes. Security can be set on saved searches to restrict access to relevant staff members.

Filter search results
: Yes

SQL-based search
: Not provided through the application. However the application does support a command line search as well as an API for retrieval or records/data.

Export search results
: Yes, search results can be exported using any of the available Crystal Reports or Report Writer reports in formats such as PDF, CSV, Excel, Word, etc.

Free-text (Google) searches
: Yes, keyword search is available on single or aggregate fields.

Search result views

Yes, multiple views of search results are available, and all are configurable to meet museum staff preferences. There are three general layouts of search results currently available: grid, columns of data, or stacked record by record.

Multilingual searching

Yes, search terms can be in any language (however, only terms that are in the database will be found – no auto-translation of search terms is available).

Report styles included

Yes, Argus has two reporting tools: Crystal Reports and Report Writer. These two tools print to CSV, PDF, Word, Excel and more. Crystal Reports facilitates complex reports with many options for formatting. The Report Writer prints simple reports to CSV or PDF, with minimal formatting options. Images and data from any field in the database can be included reports.

Report customization

Yes, museum staff can customize reports and easily create new reports. The Report Writer tool is very easy to use – museum staff can create or modify reports with no assistance from IT or the vendor. To create or modify Crystal Reports some training is required – many clients request assistance from IT or the vendor to create or modify Crystal Reports. This is available as a service. Please note, during implementation, part of the implementation package is to create and modify any Crystal Reports that are needed.

Report program

Argus has two reporting tools: Crystal Reports is a third party tool and the Report Writer is a built-in tool in the application.

Museum functions

Collections management function overview

Argus is a comprehensive collections management system that is designed to enable museum staff to manage all processes and aspects of their collections. From accessioning to exhibitions, conservation to shipping, research to inventory, Argus provides fields, templates and workflows to ensure efficiency and accuracy.

Registration

Argus enables museum staff to track provenance, description, location, valuation, conservation, copyright information, and many other details about each object. The fields are configured to match requirements, and any relevant documentation and other media files can be attached. Further, relationships between objects, activities, and individuals or institutions (parties) can be tracked to ensure data is always present in its full context.

Acquisitions

Yes, museum staff can track acquisitions in Argus with as much detail as is desired. Descriptive information, dates, individuals or institutions involved, costs, purchase or deeds of gift information can all be tracked and more.

Inventory management

Yes, Argus support inventory management. Searches and reports can be run on any criteria, such as based on locations, valuations, conditions, etc. In addition, since Argus is compatible with mobile devices, inventory tasks can be performed on the fly from warehouses or any location; staff can access from anywhere, not only from their desks.

Internal tracking

Argus can track locations with as much detail as the customer prefers (prefix and suffix patterns are defined by staff). Location histories are stored, permanent locations can be designated and updated, and searching and reporting is easily performed on current locations of objects. Batch update tools, such as the Update Locations Wizard, facilitates updating the locations or a batch of objects or boxes moving to one location, multiple locations, or back to permanent locations.

External shipments

Yes, you can track shipping with Argus. You can track the parties or institutions involved, the dates, costs, objects and/or boxes, locations, and any other data you would like to track.

Cataloguing

Yes, Argus supports multidisciplinary cataloging. When cataloging a new record, once the record type is selected Argus will filter the available fields to show only the fields relevant to that collection. For customers with a wide variety of collections (e.g., paleontology, fine art, historical collections) this ensures they have all the fields they need as they catalog, without having to scroll past fields not relevant for that collection type. Further, Argus supports multiple controlled vocabularies and museum staff can control to which fields they should apply.

Conservation

Yes, Argus allows museum staff to track information about conservation, including condition reporting and treatment reports, costs, locations, and descriptions in as much detail as desired.

Curatorial research

Yes, Argus allows for supporting and tracking in-house research. The many search options and tracking of relationships between objects, activities and parties supports viewing the full context of an object, activity or party. Research can be added to records, documents can be attached, and metadata about the research can be tracked such as the author, dates, and any other desired details.

Publications and printed material

Yes, Argus allows you to link publications and printed materials to object records, including bibliography tracking, lists of archival materials, etc. The Portal also facilitates searching of additional databases, since the external search feature allows a search to be passed through to any selected databases that museum staff think might have relevance to their portal users.

Rights management and reproduction

Yes, Argus provides rights and reproduction management so that museum staff can track copyright, intellectual property rights, right to reproduce, etc. Through the Portal, visitors can submit requests to museum staff regarding rights and reproduction requests (or other requests).

Risk management and valuation

Yes, Argus allows for tracking of valuation, appraisals, insurance policies and other risk management data. Like all fields, this data is subject to security permissions so it can be restricted to be viewed or editable by only certain staff members.

Exhibitions

Yes, Argus can track data and tasks related to Exhibitions. Exhibitions are managed with their own record, and then linked to the objects that are part of that exhibition. An individual object may be part of many exhibitions and that history can be accessed from the object record. Working lists for creating exhibitions is available through the Saved Lists feature.

Loan management

Yes, Argus offers loan management, including generating forms and contracts, as well as tracking any data and tasks related to incoming or outgoing loans.

Deaccessions

Yes, it is possible to track deaccessions in Argus, including data about the parties or institutions involved, linking objects that are part of the deaccession, legal steps and any other data that is required.

Digital asset management

Argus has an API that allows the customer to work with any Digital Asset Management System. By the end of 2017 the Argus API (Web Services API) will offer two-way CRUD (Create, Read, Update, Delete) functionality. The API gives access to any field in the database, and the Argus Design Suite tools allow for creation of new fields in the database or modification of fields in the database to meet any integration requirements with a DAMS.

Additional features and functions

As mentioned in the product description, Argus comes with a Portal which can be used for internal read-only access, and/or for public access. The Portal comes with functionality that supports search and discovery for users unfamiliar with the collection (browse, facets for narrowing/broadening search, display based on query). The Portal is also designed to facilitate a dynamic, up-to-date reflection of the collection, without requiring staff time or effort to maintain it. As such, once parameters are set as to which records and which fields are permitted to be shared on the Portal, the Portal is updated in real-time with any records that match that criteria. In addition, portions of the collection can be highlighted through query-based filters—such as what has been added to the collection recently, what is currently on exhibition, previous exhibitions, etc. The Portal can be a separate website, embedded into an existing website, or be a pop-up Portal or tab from a link or search box. The Portal comes with a design tool that enables museum staff to make changes without assistance from IT or the vendor.

In addition to the Argus Portal, data from the Argus database can also be utilized through the API in any non-Argus website or application.

Updated information (July 2018)

Argus Enhancements – Post-January 2018

There are 4 enhancements: Audit Trial, Image Zoom, Crowdsourcing, and a Mobile App.

Now Available:

Audit Trail: Allows auditing of changes to records (edits, additions, deletions, linked/unlinked) and changes to user privileges. Audit information will only be accessible to permissioned/authorized users.

The audit trail provides a complete history of the record lifecycle from creation to deletion. In addition, there is a complete history of all changes to user privileges.

Image Zoom: Allows users to zoom and pan images, even low resolution, within both the Portal and the Data Entry screens.

Image zoom allows users to get up close and detailed with zooming or panning for photos, drawings, and fine text that would otherwise be illegible. It enables them to inspect images in much greater detail, including expanding them to full screen.

Crowdsourcing: Argus administrators and museum staff can interact with users from within the collections management system or Portal, and augment content with reviews, opinion, and feedback - while keeping control of permissions and security.

Crowdsourcing enriches curation by capturing knowledge in people's heads as it is exchanged, offering it in context with "documented" knowledge, both internal and external—enriching the visitor experience and increasing visitor engagement.

Coming 2019:

Mobile Location Update Tool: Museum staff can update the location of collection items from a mobile device (iPhone or iPad) while working with/moving items. Capabilities include barcode scanning (location and object), metadata display, location information display, queue up a batch of objects for location change.

Mobile functionality allows staff to easily update location information on the fly without needing to be at the desktop. This tool is purpose-built with a focus on streamlined workflow for moving objects and updating locations.

Argus by Lucidea - Evaluation

About this evaluation

This evaluation was performed on January 26, 2018 with a representative from Lucidea. It was evaluated by eight members of the museum community and reflects their personal opinion. These evaluations were based on a set list of tasks in a limited period of time. It is always recommended that you request a demonstration of any product in which you may be interested based on your specific requirements.

Evaluator ratings

The following table shows the ratings given to this software by members of the museum community. To understand what these ratings mean, please refer to our Scoring System & Evaluation Guide.

Each rating given is scored out of a maximum of five points. The larger the Standard Deviation number, the wider the range of scores for that task.

Task	Average	Standard Deviation
Online data entry	3.5	0.8
Publish a record to the web	4.0	0.8
Set user permissions and groups	3.8	0.5
View audit trails or change log	3.5	0.9
Import data	4.0	0.8
Export data	3.4	0.7
Create a local terminology list	3.4	0.5
Upload or attach images and files	4.5	0.5
Catalogue an object	4.1	1.0
Batch modify a set of records	3.6	0.7
Multilingual capabilities	3.3	0.5
Customize a catalogue entry page	3.9	0.8
Create a template record	2.9	1.4
Generate and/or build a report	3.8	0.7
Perform basic search	4.1	0.4
Perform advanced search	4.4	0.5
Browse records	3.6	0.5
Create an exhibit	4.0	0.8
Enter condition report information	3.9	0.6

Evaluator comments

The following comments have been provided by our evaluators after they rated the performance of each task. These are selected comments drawn from the "Additional Comments" section of the evaluation form.

- They said, "There is a lot more we can show you!" I wish we had had time… I would have loved to have seen more…
- Overall - I am very impressed with this system. It seems to be very user-friendly, the interface is attractive yet functional. Many of the functions also seem quite intuitive which makes me feel

it would be an easy system to use and implement. I also know the product can also be scaled to accommodate professionals working at smaller museums as well, which is an important feature for many museums in our province.

- They also mentioned:
  - Auto-generates finding aids and can be used for archives.
  - Sister product – SKCA? – (archival management system).
- The application had impressive functionality overall. However, screen presentation was often busy and/or cluttered and not particularly viewer friendly. Tiny font for audit trails is one example. I was impressed by the option to integrate the archival application.
- Very customizable – very powerful - more complex as a result. But administrator can set for groups of users (e.g. volunteers) limited view/options, so that functionality and information presentation can be suitably simple for those groups.
- Can put archival material directly into Argus database, or can use the SKCA sister product with specific archival functionality.
- Providing a range of review options when doing data entry would be helpful. How multiple users editing the same record at the same time is handled in a "live" environment requires further clarification.
  - *Vendor comments*: Within Argus there is no need for the record to be locked during the edit process; this allows multiple concurrent users to work on the record without waiting for others to complete their work. The record is updated after the save button is clicked—if the edits do not conflict with changes made by others the record is simply saved. If another user has edited the same data, the system will provide options on the screen as to how the user they can proceed. No data is lost during this process; Argus always retains record history and versions.
- Looks clean with relatively simple tabs and modules for ease of use;
- Built-in design tools allows institutions to customize database which appears to be fairly simple;
- Via follow-up question: Vendor claims that regular updates will not compromise data nor alter format changes – this is reassuring.
- Argus can manage archive collections, but they also offer an Archive Application (SKCA) which is a more comprehensive system and can cross-reference with objects in Argus CMS.
- Generally, I find the product cumbersome. Too many tabs. Entering records for an exhibition of loaned works that includes 200-plus objects is time-consuming.
  - *Vendor comments*: During implementation, clients can remove any unwanted tabs/fields, consolidate as they wish, or add custom requirements.
  - If a user wants to add a large number of objects to an exhibit there are a number of ways that Argus can streamline this process. It allows users to add multiple objects at once via a search (all search options fully available), add data via a CSV import, or copy/paste a previous exhibit and update as needed.

CollectionSpace - Profile

Note

This profile was completed by the software vendor at CHIN's request and does not reflect the views or opinions of CHIN. It is presented for information only and does not indicate approval or accreditation by CHIN. Inclusion of specific products does not mean that CHIN recommends the software, but that members of the community expressed interest in learning about these products.

This information was accurate as of January 2018. For more information or to request updated information, please contact the vendor directly.

Product name

CollectionSpace

Vendor name

CollectionSpace (CSpace) is an open-source application supported by a non-profit organization. The program team does not provide services that many institutions require such as hosting, data migration, help desk support, configuration, server monitoring, upgrades, etc.; rather, we support a healthy ecosystem of registered service providers surrounding and supporting our community. Answers in the vendor overview below refer to the non-profit organization that serves as the home for CollectionSpace.

Vendor overview

Website URL

http://www.collectionspace.org
http://www.lyrasis.org

Head office

1428 W. Peachtree St., NW
Atlanta, GA
United States 30309
Year founded: 1936
Telephone number: (800) 999-8558
Fax number: (404) 892-7879

Email: collectionspace@lyrasis.org
Contact person: Megan Forbes

Product overview

Product description

CollectionSpace is an open-source, web-based collections management system for museums and more. From cataloging and loans to inventory and media handling, CollectionSpace is used to manage the day-to-day activities of the curators, collections managers, and others who work with objects, artifacts, specimens, and more.

Disciplines supported

- Art
- Anthropology
- Herbaria
- Botanical Gardens
- Bonsai Gardens
- Design Materials
- Local History and Material Culture
- Public Art

Product launch date

The first pre-production release of CollectionSpace was in 2010. The first production release was in 2012. The last major release was in July 2017.

Product history

CollectionSpace has had the same goal since its inception: to design, develop, and share a platform for collections information management that supports traditional collections management activities; enables the integration of emergent and dynamic new technologies into the information ecologies of museums; and is an effective and affordable alternative to one-off applications developed in-house and proprietary offerings.

Future development

The next public release of CollectionSpace is scheduled for the first quarter of 2018. This release will include new code for the application's user interface (more below), a profile to support public art collections, and a new public user interface component.

Demo version

The full application is available. A full list of domain-specific profiles, e.g. for anthropology or botanical gardens, can be viewed.

Support

Please note, because CollectionSpace is not a vendor, the answers to the questions below will vary by service provider. We are able to answer specifically for the CollectionSpace program team, which provides general support to the CollectionSpace user community, but not support in a traditional vendor sense.

Support methods

Users can reach the CollectionSpace program team via phone, Skype, email, or the questions section of the program wiki. The CollectionSpace user community also provides support to one another via email and the program wiki.

Support language(s)

English

Support availability and hours

The program team is available during normal business hours, both Eastern and Pacific times, Monday through Friday.

Support fees

None, although we limit the amount of support we provide before recommending that a user or implementer take his/her query to a service provider. Implementers who become members of the CollectionSpace community receive additional support. Annual membership fees vary by the size of the member organization.

Client support network

The CollectionSpace community is comprised of a wide variety of museums and other collecting organizations. Staff at each of these organizations participates in program governance, and provide assistance to one another via email and the program wiki. A partial list of CSpace community members is available.

Training

Many training materials are freely available via the CollectionSpace program wiki, including a user manual and screencasts. Registered service providers provide synchronous training for CollectionSpace, at varying fees.

System updates and maintenance

CollectionSpace has between 1-2 major public releases per year, and may have smaller maintenance releases more often. All updates are freely available; individual service providers may or may not include upgrades in their standard pricing.

Cost

Pricing

CollectionSpace is open-source software and thus is free to download and install. There are no annual licensing fees, nor are there any additional costs per user. Implementers may choose to become members of the CollectionSpace community and participate in project governance. Fees for membership are based on the museum or collection's operating budget. Implementing institutions may choose to work with a service provider for installation, configuration, data migration, hosting, support, etc. Costs for these services will vary by service provider.

Maintenance costs

New releases of CollectionSpace are freely available. If working with a service provider, maintenance and upgrade costs will vary.

Additional fees

The code and documentation for CollectionSpace is freely available. Implementing institutions may perform their own configuration, data migration, etc. If working with a service provider, fees for services such as data migration will vary.

System specifications

Operating systems supported

CollectionSpace is a web-based application, and can be accessed via Chrome, Firefox, Safari, and other modern web browsers. Internet Explorer and Microsoft Edge are currently not supported. CollectionSpace may be used on computers, laptops, or tablets with Apple, Microsoft, Linux, or Android operating systems.

Underlying database

The underlying database is PostgreSQL (Postgres), an open-source, object-relational database management system (ORDBMS) with an emphasis on extensibility and standards compliance.

Platform(s)

CollectionSpace may be accessed via any device (including desktops, laptops, tablets, and smartphones) capable of running a modern web browser, and with access to the internet or a cellular connection.

Hardware requirements

Client recommendation

Since the client side of CollectionSpace is a standard web interface, the requirements for the client are relatively light. Clients need only a reasonably up-to-date web browser (Internet Explorer is not supported) running under an operating system like Windows 7 or Mac OS X. Because the CollectionSpace front-end runs in JavaScript within the browser, a faster client computer with more memory will yield better performance. The speed of the JavaScript interpreter in the client browser will also impact some aspects of performance.

Server recommendation

We strongly recommend installing CollectionSpace on a dedicated Ubuntu 16.04.x LTS server. Most of our development and testing of CollectionSpace has taken place on Ubuntu 16.04.x LTS servers. That said, as far as we know, the CollectionSpace server runs fine on Mac OS X, Windows 7, and several other flavors of Linux.

Staff requirements

The client side of CollectionSpace may be managed by existing museum staff. Moderate to advanced levels of technical expertise is required on the server side for organizations wishing to self-host.

Plug-ins and/or modules available

A number of web-based applications (or "webapps") have been developed that connect to CollectionSpace and perform specific tasks. Webapps may interact with the CSpace API or connect directly to the database. Any CSpace implementer or service provider can write additional webapps to support specific tasks. All existing webapps are freely available; some have been accepted into the core CollectionSpace code and are supported by the program team, others have been developed by

individual implementers and would need to be adapted for general use. Examples of popular webapps include a public research portal and a pair of apps for barcoding.

Third-party requirements

The client side of CollectionSpace must be accessed via a modern web browser such as Chrome, Firefox, or Safari. Custom reports are written via the open-source application JasperReports. The server side has a number of third-party requirements, all of which are listed on the CollectionSpace program wiki.

Interoperability

CollectionSpace was designed to be interoperable with third-party applications. All data in the system is available via native API. CollectionSpace implementers have integrated with digital asset management systems, online public browsers, content management systems, and another third-party applications.

Accessibility

The CollectionSpace user interface generally follows WCAG. UI components are presented to users in ways they can perceive, and all functionality is operable via keyboard. Users can take advantage of browser-based accessibility features, such as the ability to zoom in at the page level, or install plug-ins to change standard displays to high-contrast.

Customization

CollectionSpace is highly configurable. Fields and procedures may be hidden, added, renamed, and modified. Depending on the internal IT capabilities of the implementing organization, these changes may be done in-house or with the assistance of a service provider.

Web integration capabilities

Cloud functionality

CollectionSpace is a web-based application. It may be installed on a server hosted by the implementing institution, on a cloud server (e.g. Amazon) controlled by the implementing institution, or a cloud server controlled by a hosting service provider.

Server location
: Depends on whether application is self-hosted or hosted by a 3rd party.

Security protocols
: Same as above.

Typical or average uptime
Same as above.
Back-end maintenance procedures and downtime
Same as above.

Browsers supported

CollectionSpace is regularly tested with the latest versions of Chrome, Firefox, and Safari. The application does not currently work with Internet Explorer and Microsoft Edge. We do not generally test against older versions of browsers.

Web-based access for data entry

All end user functionality is accessible via the web.

Web publishing platform

All data in CollectionSpace is available via native API. Implementers may publish data to the web via public portal or, for example, via an open-source WordPress plugin. There is not currently a webapp for online exhibitions.

Linked open data functionality

CollectionSpace does not currently support linked data, but there is no impediment to it doing so if an implementer wished to design and support the development of this functionality.

User groups and security

User profiles

Each user or user-type may be assigned a distinct role in CollectionSpace. These roles are created and maintained by the system administrator. Multiple users can be logged in and editing at the same time. Multiple users editing the same record may result in data loss.

User groups

CollectionSpace uses role-based security to manage permissions. Administrators create roles with different levels of permissions and assign those roles to users. For example, an administrator can create roles with restricted permissions for interns or volunteer users. By default, there is an “admin” role and user with full permissions.

Visitor profiles

By default, there is a “read-only” role and user available.

Installations

CollectionSpace is web-based and may be accessed via any number of workstations.

Audit trails and/or edit history

CollectionSpace keeps track of only the time and user of last edit made to a record. The current CollectionSpace user interface does not provide an audit trail. Implementers may design reports that provide some of this functionality.

Offline access

CollectionSpace cannot run or access data without an internet or cellular connection.

Privacy features

CollectionSpace leverages the industry standard TLS/SSL protocol supported by all modern web browsers to ensure all passwords and information transmitted over the Internet remains private and secure. TLS/SSL must be configured and enabled at deployment time.

Data migration and stability

Import formats

Data may be uploaded via CollectionSpace’s RESTful API or via a CollectionSpace-specific XML format. Data has been successfully migrated to CollectionSpace from a wide range of collections management systems. Data can be imported directly by implementers or with the assistance of a service provider.

Export formats

Data can be exported via the CollectionSpace API or reports. JasperReports, the open source reporting engine used by CollectionSpace, can output data in a wide variety of formats.

Backups

Backups are the responsibility of the implementer, if self-hosting, or the service provider, if hosting off-site.

Standards and schemas

Metadata schemas

CollectionSpace does not include any specific standards-based exports. Implementers may create such exports via JasperReports.

Data content standards (cataloguing rules)

CollectionSpace is based on the Spectrum documentation standard, which maps to Dublin Core, CDWA, CCO, and the CIDOC CRM. Extensions to support domain-specific practices are based on the standards of those domains, e.g. DOCAM for variable media and Darwin Core for specimens.

Vocabulary standards

Implementers may import any desired vocabularies to CollectionSpace. The application does not ship with any pre-populated vocabularies.

Local terminology lists

CollectionSpace provides many places for implementers to add local lists, whether short pick lists (via drop-down menus in the UI) or larger controlled vocabularies. Lists and vocabularies may be multi-lingual.

Accreditation

CollectionSpace does not hold certifications or accreditations from any museum or cultural heritage associations. These certifications generally are available only for a fee, and are often out of the reach of non-profit and open-source programs.

Data entry and content

Media upload/linking

Media can be uploaded and stored in CollectionSpace or linked from an external source. Uploading is a simple process, just click on the file and upload. Images may be batch uploaded via an external webapp.

Media formats supported

CollectionSpace supports over 100 major file formats via ImageMagick, an open-source media processing application. Supported formats include JPGs, TIFFs, all Microsoft office suite file types, PDFs, and a variety of audio and video file types.

Data entry features

Copy and paste
: Yes

Search and replace
: No

Spellcheck
: Yes, via browser.

Bulk cataloguing
: No

Batch edit
: Yes, in some instances.

Batch location change
: Yes

Duplicate record search
: Yes

Template record
: Yes

Date selection and formats
: Yes

Mandatory fields
: Required fields can be configured, but not via the UI.

Others
: No response.

Spreadsheet editing view

No

Geographic mapping

CollectionSpace can capture georeferenced data via it’s geographic location authority. This data can be exported to a variety of mapping tools; current integrations include Google Maps and the Berkeley Mapper.

Multilingual fields

CollectionSpace is Unicode compliant using the UTF-8 encoding for all data. Fields may contain multiple languages, and users may search across languages. Many fields may be repeated to include multiple languages.

Barcoding

CollectionSpace is integrated with two webapps for barcoding and barcode printing. The webapps can be updated to align with different hardware combinations.

Labelling

Printable labels may be designed via JasperReports.

Search and reporting

Types of search supported

Users may perform keyword and advanced searches across all object, procedural, and authority records. In-record, authority terms are located via a predictive search interface.

Boolean queries
: Yes

Query any field
: Yes, with limits.

Sort query results
: Yes, single-level with limits.

Saving search results
: No

Filter search results
: Yes

SQL-based search
: No

Export search results
: Yes, search results may be sent to a report.

Free-text (Google) searches
: Yes

Search result views
: Search results are displayed via a list.

Multilingual searching

Searching works across all languages and alphabets.

Report styles included

A list of reports included with the standard installation of CollectionSpace is available via the program wiki. Custom reports may be created via JasperReports.

Report customization

Any existing report may be customized via JasperReports.

Report program

CollectionSpace is integrated with JasperReports Library, an open-source reporting engine. JasperReports can use data from any kind of data source, and print or export a variety of formats including HTML, PDF, OpenOffice, and Microsoft Office.

Museum functions

Collections management function overview

CollectionSpace supports the day-to-day activities of museum collections staff, from cataloging and loans to exhibition planning and media handling. The web-based interface allows for collaboration among departments, while a relationship-based architecture increases connections among objects, procedures, and related media.

Registration

CollectionSpace supports the proper documentation of museum objects throughout their life cycle, from initial entry and acquisition to cataloging, loans, exhibitions, conservation, and if necessary, deaccession.

Acquisitions

CollectionSpace has an Acquisition procedure that includes all fields recommended by the Spectrum documentation standard. Acquisition records may be linked to Intake forms, Cataloging record, Media records, and more. All personal names in the Acquisition record point to the Name authority.

Inventory management

CollectionSpace has a Location, Inventory, and Movement procedure that allows implementers to track current, past, and future locations of all objects in the collection or held by the museum (i.e. on loan or deposit). Locations are managed via a Storage Location authority, for which edit permissions

can be limited, or the Organization authority for objects on loan or out for conservation. Custom reports allow implementers to create inventory lists by location.

Internal tracking

CollectionSpace's Location, Inventory, and Movement procedure manages object movement within the museum, e.g. when objects are moved to exhibit spaces, or off the shelf for research or conservation.

External shipments

No response.

Cataloguing

CollectionSpace has an extensive Cataloging procedure and a library of extensions that can be combined to support a wide range of collection type, including anthropology, botanical gardens, herbaria, local history and material culture, design materials, bonsai gardens, and public art. Data entry is controlled is many places by drop-downs and links to controlled vocabularies. Multi-valued fields and user-entered relationships allow for greater precision in data entry.

Conservation

CollectionSpace includes procedures for both condition reporting and basic conservation.

Curatorial research

No response.

Publications and printed material

Print materials may be tracked via the Citation authority, and referenced throughout the application. Digital versions of bibliographic resources may be related to any cataloging or procedural record.

Rights management and reproduction

No response.

Risk management and valuation

Purchase prices, historic, and current valuations may be tracked via the Acquisition and Valuation procedures.

Exhibitions

The planning process for permanent, temporary, and traveling exhibitions may be managed via the Exhibition procedure. Implementers may use the procedure to track work groups (e.g. curatorial, preparators), sponsors, venues, and object lists.

Loan management

CollectionSpace includes procedures for loans in and out that track dates, authorizations, object lists, and more.

Deaccessions

CollectionSpace has an Object Exit/Deaccession procedure that allows implementers to track the disposition of objects and the deaccession approval process.

Digital asset management

Implementers may upload and store many types of media in CollectionSpace; however, it is not a digital asset management system. Integrations with existing proprietary and open source systems exist, and new integrations may be created.

Additional features and functions

CollectionSpace is continually improving. Our community contributes time, expertise, and code. Members work together to define and develop new features and functionality. These improvements are then made freely available to the entire user community.

Updated information (July 2018)

Future development

Version 5.0 of the application was released in spring 2018, and included a complete re-write of the user interface code using the React JavaScript framework. The full technical roadmap for the application can be found on the program wiki; planned improvement for 2018 and 2019 include new procedures to support transport, insurance, and indemnity; new tools for public browsing of collections information, and improvement to reporting.

Support

As of summer 2018, the non-profit organization LYRASIS has assumed primary responsibility for providing services and support around CollectionSpace.

Support methods

For implementers hosting with LYRASIS, support is available via phone, email, and an online ticketing system.

Support availability and hours

For implementers hosting with LYRASIS, support is available between 8:00 a.m. and 5:00 p.m., Eastern Time, Monday through Friday.

Training

LYRASIS provide synchronous training for CollectionSpace at varying fees. In addition, many training materials are freely available via the CollectionSpace program wiki, including a user manual and screencasts.

System updates and maintenance

For implementers hosting with LYRASIS, LYRASIS will be responsible for: the necessary maintenance of the servers and any required ancillary software for the normal performance of the service; daily backups of the service and restoring from backup in the case of a catastrophic failure; and installing all community-adopted updates.

System specifications

Operating systems supported

Microsoft Edge is now a supported browser.

Web integration capabilities

Web publishing platform

A plugin to support publishing collections data to the web will be released in late summer 2018.

Standards and schemas

Vocabulary standards

Implementers may still import any desired vocabularies to CollectionSpace. The system is now also able to ship with Chenhall's Nomenclature included.

Museum functions

External shipments

A new procedure to manage Transport (based on the Spectrum procedure of the same name) will be released in summer 2018.

CollectionSpace - Evaluation

About this evaluation

This evaluation was performed on January 26, 2018 with a representative from Lyrasis. It was evaluated by six members of the museum community and reflects their personal opinion. These evaluations were based on a set list of tasks in a limited period of time. It is always recommended that you request a demonstration of any product in which you may be interested based on your specific requirements.

Evaluator ratings

The following table shows the ratings given to this software by members of the museum community. To understand what these ratings mean, please refer to our Scoring System & Evaluation Guide.

Each rating given is scored out of a maximum of five points. The larger the Standard Deviation number, the wider the range of scores for that task.

Task	Average	Standard Deviation
Online data entry	3.5	0.8
Publish a record to the web	3.3	0.5
Set user permissions and groups	4.0	0.6
View audit trails or change log	0.7	1.6
Import data	2.5	1.0
Export data	2.5	1.0
Create a local terminology list	3.8	0.8
Upload or attach images and files	3.3	0.5
Catalogue an object	4.0	0.6
Batch modify a set of records	1.8	1.6
Multilingual capabilities	3.2	0.8

Task	Average	Standard Deviation
Customize a catalogue entry page	2.3	1.4
Create a template record	3.2	0.4
Generate and/or build a report	2.5	0.8
Perform basic search	3.2	0.4
Perform advanced search	3.3	0.5
Browse records	3.2	0.8
Create an exhibit	3.8	0.8
Enter condition report information	3.7	0.5

Evaluator comments

The following comments have been provided by our evaluators after they rated the performance of each task. These are selected comments drawn from the "Additional Comments" section of the evaluation form.

- Overall, I was most impressed with the flexibility of this product. The customizable capabilities are fantastic. I was also impressed with the variety of other applications that it is able to communicate with to increase functionality, or allow for a better equipment application to handle certain aspects. It seems that many smaller organizations will need assistance through a service provider to do any customization and get their instance up and running, but that once it is they will have the benefit of not incurring licensing fees and other costs related with a proprietary system.
- One concern that I had was that some implementers may find it cumbersome to have to constantly create new record types and then relate them, but once the system is used it would likely work itself out.
- I would like to have given a higher rating than 4, but as this is the first time that I have seen a tool such as this, it is impossible for me to compare and see if offers the highest capabilities for each task.
- Until this presentation, I never realized how complex cataloguing had become in the digital world. Although the product may seem quite complex at times, I assume that with sufficient training this product would be a very useful tool. My overall impression is that the product seems well designed, and rather good product.
- The software is very user friendly for doing the data entry, but the implementation, maintenance, migration, or upgrading must be done by a savvy person who will need to do a lot of reading on the software website and wiki, without support from the company. It's missing some functionalities within the software. Though the software can support any language, it's up to the institution to translate the software, therefore a lot of work.

- As an open-source system it has a lot of really good features. It's clearly developed with feedback from the user community. But also as open source there is technical knowledge needed or access to a vendor that can provide.
- CollectionSpace is a good system that would work well for art or artifact collections, not as flexible for photos or archives. Some level of technical expertise.

M3, M3_Online and MINT by MINISIS Inc. - Profile

Note

This profile was completed by the software vendor at CHIN's request and does not reflect the views or opinions of CHIN. It is presented for information only and does not indicate approval or accreditation by CHIN. Inclusion of specific products does not mean that CHIN recommends the software, but that members of the community expressed interest in learning about these products.

This information was accurate as of January 2018. For more information or to request updated information, please contact the vendor directly.

Product name

M3 (MINISIS Management for Museums) and MINT (MINISIS Integrated Archives, Library, and Museum System). MINISIS produces a client-server desktop version (on premise or hosted), MINT (MINISIS Integrator) which is designed for cross cultural integrated application for Archives, Libraries (ILS) and Museums (CMS). As well M3_Online is a completely web-based SaaS solution that can be run on premise or hosted in the Microsoft and IBM clouds. For this evaluation the focus was on the M3 desktop solution.

Vendor name

MINISIS Inc.

Vendor overview

Website URL

www.minisisinc.com
www.minisis.ca

Head office

Vancouver, British Columbia, Canada
Year founded: 2000
Telephone number: 1-604-255-4366, 1-877-255-4399 (toll free)
Fax number: 1-604-255-4367

Email: minisis@minisisinc.com
Contact person: Christopher Burcsik, Christopher@minisisinc.com

Canadian/North American offices

MINISIS Inc. regional North American offices

Vancouver, Woodstock, Toronto and Michigan.
Year opened: 2000
Telephone number: 1-604-255-4366, 1-877-255-4399 (toll free)
Fax number: 1-604-255-4367
Email: minisis@minisisinc.com
Contact person: Christopher Burcsik, Christopher@minisisinc.com

Product overview

MINISIS currently produces several products for the museum, archive, and library domains. The current product suite contains M3 (MINISIS Management for Museums) and its online SaaS version called M3 ONLINE. M3_ONLINE is hosted in the IBM or Microsoft Tier 1 Clouds. MINT contains M3, along with M2A (Archives) and M2L (Library), which are integrated via a common registration module. Again, for this evaluation - the CHIN team only looked at M3 desktop/client-server version.

100% Canadian owned and operated, supporting Canada and its culture from our own backyard!

Product description

Officially released in 1994, M3 was developed with the participation of experts from the museum and gallery community to meet the needs of small, medium-sized, and large cultural institutions. M3 is an ideal tool for users to enter, import/export, and manage collections data in an organized, easily manipulated, and flexible fashion.

The M3 application was built to meet the general requirements of most cultural institutions. Its initial design was based on information received from strategic partners during the development process and it is continually updated with every new installation. Given more than 5000 pre-defined fields dealing with all aspects of collection and exhibition management, only slight customization of the system is required to fulfill the most particular of needs. Customization can be facilitated with the help of MINISIS Inc. professionals or, thanks to the simplicity of the system, done by the client alone, thus avoiding both the initial premium attached to a fully tailored system, and further costs for outside technical staff.

General information

- Available as both a desktop-based and an online application customizable to individual needs.
- 6000+ predefined fields.
- Pre-defined report formats and a complete report generator to build on-demand reports.
- Over 50 pre-defined data entry worksheets.
- Pre-defined query forms.
- Template for an internet interface.
- SMA (Standard MINISIS Application) for easy customization.
- User-friendly with context-sensitive help.
- Fully multimedia compliant.
- Fields exist for any type of cultural institution or field of specialty.

M3 core system functions

- Acquisitions, accessioning, and appraisals.
- Cataloging for art, human history, natural history, and specialties.
- Reproduction and publication services.
- Museum education and promotion.
- Object location, movement, and control.
- Exhibition and loan management.
- Loans in and out.
- Conservation and preservation.
- Risk management and valuation.
- Covers the management of: archaeology, philately, numismatics, natural history, taxonomies, oral history, human history, ethnology, science and technology, and archives.
- Spectrum Compliant
- AODA Compliant/Compliant with most other accessibility standards

Disciplines supported

- Archaeology
- Art
- Buildings and property management
- Philately
- Numismatics
- Natural history (eg: Mammalogy, Paleontology, Ichthyology, et al).
- Taxonomy
- Oral history
- Social/human history
- Ethnology
- Science and technology
- Bibliographic
- Archives
- Reference Room and Online request management.

Product launch date

1994

Product history

MINISIS has been used for museum collections management systems (CMS) since the 1970s. M3 was specifically created to help users that were left stranded by another CMS vendor in the mid-1990s and has been updated yearly ever since. Product underwent development across platforms from HP 3000, DOS and Unix to Windows and now web/SaaS online platforms. The software has been distributed on a social entrepreneurial basis to ensure access to technology to support organisational holdings since 2000. No one gets rich off of MINISIS as all dividends stay in the company. Therefore, we are able to help those with software needs regardless of their background or resourcing levels. The company like our software should continue to live ongoing through the next several decades.

Future development

The focus of all future development will be the migration of all software and features from the client-server of M3 ported to work on the web via an internet-based browser. MINISIS already has the most complete CMS application with the modules mentioned above. As a result, our focus is constantly updating the software for fields and screens and new functionalities. However, there are not a lot of features to add in that are not present, already. So again, most future development is to keep the SaaS models expanding and include everything that the current desktop/client-server versions can do. Unfortunately, the web world in general, is not able to perform or handle all of the loads/processing that current desktop/client-server configurations can process. MINISIS is currently developing the iSMA which will enable end users to change and adapt their own screens without knowing HTML via an online browser. Taking the techie out of technology.

Demo version

Can be downloaded at https://minisisinc.com/pages/demos.html or contact MINISIS. Live demonstrations can be provided or even a sandbox test environment in the MINISIS cloud upon request.

Support

Support methods

On premises or remote via Skype, GoToMeeting and other online tools, telephone, email and online ticketing system.

Support language(s)

MINISIS is fully UTF8 and Unicode compliant. It can support most languages and can handle most indigenous languages. Interfaces for the application are available in the following languages:

- English
- French
- Arabic
- Mandarin
- Cantonese
- Hindi
- Portuguese
- Spanish

Support availability and hours

Monday to Friday for clients with Basic/Bronze Technical Support and Maintenance 7 a.m. EST to 7 p.m. PST. 24/6 for Premium/Silver and VIP/Gold Technical Support and Maintenance.

Support fees

Support fees are charged as portion of the purchase price (Basic = 13%, Premium = 19%, VIP = 29%) and includes both technical support and maintenance (TS&M). This combined support and maintenance program provides everything from free software updates and upgrades, to over the shoulder or on-site help. The annual TS&M is optional and can be opted in/out in any given year without penalty.

The details of the support options are:

- **The Basic/Bronze Support services program includes:**
    - Direct access to help center consultants with how-to and troubleshooting questions
    - Ability to contact or leave messages and have 21 hours/5 day a week support
    - Guaranteed response to any issue between immediate to 24 business hours between the hours to 7:00 a.m. to 7:00 p.m. (PST), Monday to Friday, excluding local and national holidays
    - Access to and automatic notification of software updates, upgrades, and enhancements including access to the active product work plan and its feature enhancements via MIN.NET
    - Free software updates to MINISIS or any application in use by the organisation
    - Beta releases and the ability to be part of any product trial groups
    - First right of refusal to available spots at the International User Group Meetings
    - Access to all new documentation when released
    - Input into the yearly prescribed product work plan

    - Newsletters
    - Web site access to knowledge database, the work plan and other company specific details
    - Ability to use Tracker for online, real-time tracking of issues/enhancement requests
    - Maximum of: 48 hours of support per year
- **The Premium/Silver Support services program includes:**
    - Direct access to help center consultants with how-to and troubleshooting questions
    - Ability to contact or leave messages and have 21 hours/5 day a week support
    - Guaranteed response to any issue between immediate to 8 business hours between the hours to 7:00 a.m. to 7:00 p.m. (PST), Monday to Friday, excluding local and national holidays
    - Ability to pre-determine or identify the key support resource(s) of choice
    - Ability to book time for assistance over the phone or for on-site visits
    - Access to and automatic notification of software updates, upgrades, and enhancements including access to the active product work plan and its feature enhancements
    - Beta releases and the ability to be part of any product trial groups
    - First right of refusal to available spots at the International User Group Meetings
    - Access to all new documentation when released
    - Input into the yearly prescribed product work plan
    - Newsletters
    - Web site access to knowledge database, the work plan and other company specific details
    - Ability to serve in the MINISIS Focus Group which provides feedback and direction on the products throughout the year
    - Free software updates to MINISIS or any application in use by the organisation.
    - 6 days of consulting/support/service to aid with your usage of the software
    - Maximum of: 96 hours of support per year.
- **The VIP/Gold Support services program includes:**
    - Direct access to help center consultants with how-to and troubleshooting questions
    - Ability to contact or leave messages and have 21 hours/5 days a week support
    - Guaranteed response to any issue between immediate to 3 hours between the hours to 7:00 a.m. to 7:00 p.m. (PST), Monday to Friday, excluding local and national holidays
    - Ability to pre-determine or identify the key support resource(s) of choice
    - Ability to book time for assistance over the phone or for on-site visits
    - Access to and automatic notification of software updates, upgrades, and enhancements including access to the active product work plan and its feature enhancements
    - Beta releases and the ability to be part of any product trial groups
    - First right of refusal to available spots at the International User Group Meetings
    - Access to all new documentation when released
    - Input into the yearly prescribed product work plan
    - Newsletters
    - Web site access to knowledge database, the work plan and other company specific details

- Ability to serve in the MINISIS Focus Group which provides feedback and direction on the products throughout the year
- Free software updates to MINISIS or any application in use by the organisation.
- 12 days of consulting/support/service to aid with your usage of the software
- Maximum of: 144 hours of support per year

Client support network

- MIN.NET private website, webinars, and online collaboration tools like Skype, GoToMeeting, and WebEx.

Training

- Training is available via training courses (on premises), remote webinars, documentation, and instructional videos. Training is often a process of working with the client to determine the best way to tackle knowledge transfer immediately and long term. Training solutions often include unlimited access to electronic manuals, online databases and videos, and of course on-site/remote training sessions with qualified trainers.

System updates and maintenance

- System updates are performed continuously to incorporate new fixes, features, and functionalities. Every year there is one major update to the M3 application and MINISIS core software.

Cost

Pricing

Pricing is based on the number of concurrent users and the products and services requested. There are three separate products: M3, M3_Online and MINT and all have various pricing with M3_ONLINE being the most inexpensive model given it prices by space and usage.

Maintenance costs

Are optional and can be renewed or cancelled every year. The costs are combined with the technical support and maintenance (TS&M) which is based on the portion of the purchase price.

Additional fees

The only additional fees are for anything with copyright protection (e.g. Chenhall Nomenclature), and then for any additional services required on a per diem basis. Other products (ex. web OPACs, data

conversion, APIs, customisations, hosting services) the client wishes to add on may have differing costs based on client expectations/requirements.

System specifications

Operating systems supported

Windows and internet browsers. As MINISIS has both desktop- and browser-based solutions, the user must have Windows for the desktop version, or any modern browser to use the online/browser-based software.

Underlying database

Data can be stored in MINISIS or SQL. Note there is an additional charge for SQL licensing.

Platform(s)

Client server and web/SaaS.

Hardware requirements

Any modern Windows-based server(s) using IIS.

Staff requirements

Minimal. However, it depends on the usage by the client. Nonetheless MINISIS software tools were designed to allow non-technical end users to build, modify, and manage applications without having to be programmers. The goal is to allow users to make the most of the tools they purchase and encourage them to enhance the software with or without MINISIS Inc.'s assistance. Total IM/IT freedom, in our perspective. Let the client decide the processes, tasks, and workflows that work for their institution and make the software adjust accordingly. No extensive programming is ever required. The goal is to enable non-programming resources that have solid business knowledge to update, manage and create new screens, databases, reports as needed.

Plug-ins and/or modules available

SOAP, restAPI and other APIs are available and added to the core software.

Third-party requirements

None

Interoperability

MINISIS can exchange data (import/export) in virtually any format required. Via SOAP, REST and other APIs, MINISIS can interoperate with other tools and data sources (ex. OAI).

Accessibility

MINISIS web and desktop solutions are compliant with W3C standards and specific standards like AODA.

Customization

100% customization. The complete development toolkit is provided with the software to allow the client to change the system as they desire.

Web integration capabilities

Cloud functionality

Server location
: Hosted or on-premises solutions available. MINISIS hosts using the Microsoft Azure and IBM Softlayer Cloud infrastructure. Tier 1 architecture for our hosted clients to ensure congruence with different country laws and regulations. Clients can choose to install locally on premises with their own Windows servers, or purchase hosted servers and services in our cloud. The servers are swamped yearly to ensure the best hardware and connections are available in the cloud.

Security protocols
: All modern security protocols are employed, they are updated as required in a modern age.

Typical or average uptime
: 97.9% or higher are the guaranteed rates for hosted solutions. Clients can achieve up to 99% but some time is required for software updates and maintenance. (Sometimes server restarts are needed to engage new software updates from Windows and MINISIS.)

Back-end maintenance procedures and downtime
: Again, typically 1-3% downtime overall is required or should be considered a possibility, regardless. Over a year, most clients will update the software for new enhancements and fixes as well as for updates to the operating systems, hardware renewals, other software updates, and maintenance (ex. media players, et al).

Browsers supported

Chrome, Firefox, Internet Explorer/Edge, Safari and most web browsers that comply with the standards of the contemporary internet.

Web-based access for data entry

Yes, via the M3 ONLINE SaaS solution.

Web publishing platform

Clients typically have their own established web publishing platforms and use MINISIS Web Interface (MWI) to publish the content to the web in an integrated and consistent web style sheet. Clients can use MWI or their own and call the data via XML, JSON, and similar objects.

Linked open data functionality

Well, that depends on the definition and implementation level of linked open data (LOD). MINISIS can link and access content via numerous protocols from Z39.50 to OAI to various other standards. As universality of LOD is not fully implemented yet worldwide, MINISIS can state it is keeping current with the developments and research to date to stay current with open and transparent online content development and linking. However, the LOD standard is just coming into its prime (2018) and tools like MINISIS are being responsive to this web ideal. Being a database and application software house, MINISIS Inc is able to take advantage of advances in other fields to extrapolate to the CMS, ILS and other applications.

User groups and security

User profiles

The system comes with a complete administrative tool and script compiler tool to allow the client to add/remove defaults and change existing default profiles delivered with the system. The client can add/change all aspects of the menu, fields, and/or data that is to be restricted to various users.

User groups

Different profiles and access can be set up for users to allow various user groups to set their own needs and security. The system has different user profiles and security protocols for all types of installations (ex. cloud or desktop).

There is virtually no limit to the number of work groups (it can be 1 work group for 1 user or multiple work groups for multiple users as well). We have 10 generic roles or groups in M3 (more in MINT). Some clients even add more user groups, where every user is its own “user group”. For instance, one client has over 100 different user groups. The variations can be as simple as a field or several fields, differences between the user types to process blocking, to notifications/approvals, to the basic read/write details.

Visitor profiles

M3 has a patron module that can capture visitor profiles and manage visitors, researchers, and online visitors.

Installations

There is no limit to the number of user profiles nor concurrent users. However, the network/connectivity and server performance may be impacted, and the client may need to increase RAM/CPUs etc.

Audit trails and/or edit history

Yes. MINISIS has two audit trail processes. One is for logging simply what records were added, changed, deleted, or viewed, by which user, and at what time of transaction. The second audit trail capability is to keep and report the actual data added/changed/removed in a record.

Offline access

MINISIS has a cloud solution (web-based entry known as M3 ONLINE). It requires web access and can only be accessible online as it is hosted in Azure (Microsoft) or SoftLayer (IBM) clouds, whereas the M3 client-server/desktop version runs on any PC. The system can be configured on the PC to use the “transactional logging” capability where a user can take a copy of the database from the server and go into the field, perform data entry/update, and then the user can return to the office/network environs and when the network connection is re-established, the user can “roll forward” the transactions that were made to the records offline.

Privacy features

Yes. Users can be blocked by process, transaction, or record. Workgroups can be established, or single, on-off individual user profiles can be created. This way, the client has the ability to block (process), ex. blocking the movement of objects from some users, and (transaction) the ability to add data by some users and not others, and (record) blocking records from ever being seen by a particular user or workgroup. So, there are numerous ways to control access rights in the system. As well, with the audit capabilities and profile management, the organisation can create multiple views of the CMS to ensure privacy and protection of the assets, people, and content related to the collections.

Data migration and stability

Import formats

MINISIS has never found a data format it could not import. MINISIS has performed numerous imports in data conversion projects and has numerous data maps available for importing from numerous competing products, in formats from content-driven to technological standards. For instance: MARC, Dublin Core, and EAD to technical standards like CSV, comma delimited, or XML. Data can be migrated by the client or by MINISIS. If MINISIS performs data conversion/migration activities, it is considered a service and typically estimated upfront, so the client can determine who should or what the value of the existing data is worth to the client to migrate. Data conversion by MINISIS can be fixed-price or charged on a per diem basis. It should be noted that when MINISIS performs conversions, typically the data files are ingested into our trusted digital repository (TDR) for long-term preservation, and when conversions are done, MINISIS migrates all of the data into the new system. Although the user may never see the field on a screen, the old data is still copied forward so that the data is never lost. The user can perform searches on the new and old non-migrated data. MINISIS also has one-touch Excel loading maps to take data from CSV/Excel format files and load into M3 by the touch of a button.

Export formats

MINISIS has never found a format it could not export. MINISIS has performed numerous exports in data conversion projects and has numerous data maps available for exporting to numerous competing products, in formats from content-driven to technological standards. For instance: MARC, Dublin Core, EAD to technical standards like CSV, comma delimited, or XML. If MINISIS performs data conversion/migration activities, it is considered a service and typically estimated upfront so the client can determine who should or what the value of the existing data is worth to the client to migrate. Data conversion by MINISIS can be fixed-price or charged on a per diem basis. The user can often easily perform their own export files from the system by themselves. You own your data, so you should be able to export when, where, and how you want. MINISIS can export, as mentioned, in nearly any format (we have exported data in over 45 different formats and content standards from CSV/Excel formats to data in standardized content like EAD in XML format).

Backups

MINISIS permits the usage of an organisation’s existing network and backup tools and processes for on-premise solutions. There is nothing extraordinary or different required to back up MINISIS solutions. Therefore, a user has the ability if they want to do backups hourly, nightly, or whatever time frame they wish. Typically, most users have backups performed nightly in an automated Windows service. For cloud or hosted M3 or M3_Online users, the backups and redundancy of the data and platform are automatically included in the system management by MINISIS Cloud staff.

Standards and schemas

Metadata schemas

MINISIS can be utilized to create any map for nearly any metadata schema. By default, MINISIS has the standard metadata schemas for most common media files and content/contextual-based schemas like EAD, MARC, Dublin Core, and so on.

Data content standards (cataloguing rules)

MINISIS supports many standards. M3 is specifically designed to respect Spectrum (UK Spectrum Compliant) and any common standard like Dublin Core, CCO, or even the old CHIN standards. It should be noted that MINISIS Inc.'s integrated MINT application however can support everything from Z39.50 to RDA and MARC for instance in our library software, and EAD/DACS/RAD for archives as well.

Vocabulary standards

M3 has Chenhall, AAT, TGN. ULAN, ITIS standards are supported, and a user can use the existing validation and authority tables to create your own validated and common vocabularies. The formats are included in the software for free. However, if the data is proprietary (e.g. Chenhall 4.0), then a royalty fee has to be paid to release the content in the formatted fields of M3 to the copyright holder.

Local terminology lists

There are hundreds of fields in the M3 and MINT software for validated/local authority terminology lists (ex. role, people authority, materials, technique, object name, etc.). MINISIS also provides an add-on tool called STEMMA that enables users to create their own thesaurus/nomenclature. STEMMA is a multilingual thesauri management tool that can be used to allow the adoption of: AAT/TGN/ITIS/Chenhall to creating one's own unique thesaurus. The tool allows the user to create a thesaurus and use it as a source for validation of content like materials or naming, and ensuring users are provided "preferred terms", "used for" and "related terms".

Accreditation

M3 and MINT passed Spectrum compliancy with the Heritage Trust in the UK in 2017.

Data entry and content

Media upload/linking

Media can be attached directly to a record using file path (ex. C:\Images\239493.jpg) or via a URI/URL (ex. www.minisisinc.com\tdr\23943.jpg). MINISIS can allow users to attach via Windows Explorer or navigate via a URL button. MINISIS also produces an add-on product known as a Trusted Digital Repository/DAMS application. The TDR has a complete web interface that has an automated drag and drop loading dock feature.

Media formats supported

MINISIS natively will allow users to attach nearly any media file type (e.g. Word document, PDF, JPG, TIFF, GIF, MP3, MP4, .AVI, .txt, et al) to a database record. The Titan TDR can ingest any format and it can also process the most common file types as listed without issue. The de facto rule is that, if a generic player can run the file, MINISIS can play the media. The TDR is concerned with the saving, preservation, management of the media and its derivatives, rights, reproduction and usability.

The use of normalization maps in the TDR. The user can see the preservation formats, and access formats and thumbnail formats. Via the “Add new conversion mapping +” icon, the TDR specialists add new maps as warranted for new or formats that have not been developed (typically older obscurer formats).

The TDR can ingest any format for a digital file. That said, the life of a TDR is to keep expanding, creating new normalization maps for every increasing number of varying formats. As a result, the file formats stated here are just a subset of the entire list of file formats that the TDR continually expands to host. Again, with every new client there is usually some new format that has to have a new normalization map created for. Some of the existing formats (today) that can be saved and manipulated for long term preservation are:

- 3GP MEDIA Extension: .3gp
- Audio Video Interleave (AVI) Extension: .avi
- Blu-Ray Disc Audio-Video (BDAV) MPEG-2 Transport Stream (M2TS) Container / AVCHD (MTS)
- BMP Extension: .bmp
- Digital Negative Image File / Raw Image (DNG) Extension: .dng
- DVD Video Movie File (VOB) Extension: .vob
- Email Message (EML) Extension: .eml
- Encapsulated Postscript (EPS) Extension: .eps
- FLV Extension: .flv
- Graphics Interchange Format (GIF) Extension: .gif
- Hypertext Markup Language (HTML) Extension: .html
- Joint Photographic Expert Group (JPG) Extension: .jpg
- MP3 (MPEG-1 or MPEG-2 Audio Layer III) Extension: .mp3
- MPEG-4 Video (MP4) Extension: .mp4
- PowerPoint (PPTX) Extension: .pptx
- PowerPoint (PPT) Extension: .ppt

And, all of the Windows Office Suite and so on. In addition to the above common formats, there are approximately 40 other main formats available. Nearly every month there is a new format found or added to the repository.

Data entry features

Copy and paste

Yes. There is a full global change module to allow a user to not only copy/paste data to new fields but to paste new data into new fields, remove data from fields, insert default values to fields and so on. Also, a user can simply use the copy and paste controls via a mouse or standard Windows keyboard.

Search and replace

Yes. Again, the global change module is utilized to search and replace, overwrite, or change any values in any record or record set in the databases.

Spellcheck

Spell check is supported in the web-based/SaaS solutions.

Bulk cataloguing

Yes. Records can be duplicated, bulk loaded, or created via global change as well.

Batch edit

Yes. Users can use the global change module to edit a record, a series of records, an entire record set, or even all records in the database/application.

Batch location change

Yes. The software has a “move single object” or “move multiple objects” scripted menu process so that clients can edit location details in one or multiple records via a single transaction, ex. move all objects in record set A from the depot to the vault.

Duplicate record search

Yes. Users can search for duplicates or the user can also ensure duplicate check is turned on so that no duplicate could ever be entered in the first place.

Template record

Yes, MINISIS has the ability to create templates or different screens for different users. MINISIS also has the ability to set defaults so that when a new record is created numerous fields can have default values, ex. location detail for 100 records just acquired that will be set to a default of “processing room” for example.

Date selection and formats

Yes. As a multilingual and international software solution, MINISIS can have dates in a variety of formats. For instance, July 31st, 2017 could be stored in numerous formats including: 2017-07-31, 17-07-31, 07-31-17, circa 2017, ca.2017, 07-31-?? and so on.

Mandatory fields

Yes. MINISIS can support both conditional and unconditional mandatory field conditions. The database administrator has the ability to set mandatory conditions or change them as needed by the organisation in a 2 minute process.

Others

MINISIS is a complete HDBMS. That means users can take advantage of the core toolkit MINISIS Inc. uses to create its predefined applications, like M3 (MINISIS Management for Museums). This toolkit, called the SMA (Standard MINISIS Application), will allow the power user or database administrator to change any aspect of the system, from adding, changing, or removing fields, setting default values in records, to mandatory or conditional fields, to adding over 100 user exits, to read data like different date formats, to allowing users to engage new search/indexing parameters to building new screens, changing existing screens to reports and

so on. The SMA enables virtually any condition, format, or content to be defined for a field in the databases.

Spreadsheet editing view

Yes. The user can create any view to enter, update, or view data in the system.

Geographic mapping

MINISIS has numerous longitude and latitude fields (ex. digital, UTM, etc.) so that users can have data plotted on maps in online interfaces, for instance. These fields, with formatting codes from mapping tools found online in Google and other GIS tools, can take the data and transpose to give any view of one's data geographically.

Multilingual fields

Yes. MINISIS was the first multilingual database management system (HDBMS) in the world. This claim to fame came from MINISIS' inception at the International Development Research Centre before MINISIS was privatized from the Crown in 2000. As a result, MINISIS and its applications can house multilingual data and have special features for multilingual thesauri, having fields store data in almost any language, to have a bilingual application (screens and menus), for example.

Barcoding

Yes. MINISIS has barcode capability. It should be noted that as an Integrated Library System (ILS) vendor, barcoding has been engaged years ago and the system can be expanded to handle RFID labels, QR Codes and traditional barcodes.

Labelling

Yes. The system has numerous reports that can be printed on labels. These include bar codes to text/content and media from database records.

Search and reporting

Types of search supported

Boolean queries

Yes. No limits. AND, OR, NOT is supported, amongst a host of additional search techniques like: proximity, adjacency, any, thesaurus, pattern, Soundex; and various indexing like whole, word, whole and word, and so on.

Query any field

Yes. No limits. Any field in MINISIS can be searched at any time.

Sort query results

Yes. No limits. The user can take search results and set almost any logical sort sequencing to a record set. That could be sorting by date, by alphabetic letter, by location, or so on.

Saving search results

Yes. No limits. We call it a “Hit File”. The user can also save their search strategy for reuse with or without the records found.

Filter search results

Yes. No limits.

SQL-based search

Yes, MINISIS web tools can interpret structured SQL-based searches. As well internally in the system, the user has full line mode or command mode search capabilities, where the user can type the “field name” (ex. Title, maker, etc.), the value, and link long query syntax to search the databases.

Export search results

Yes. No limits. Typically, results are output in a standard format (as MINISIS allows users to view on-screen, print, or save to disk any data found upon searching) but the output can be a .txt, .csv, or structured XML format, for instance.

Free-text (Google) searches

Yes. No limits.

Search result views

Yes. No limits. Via the MINISIS report generator, output can be presented in as many different formats as the user desires. The output can be a predefined report, ad hoc report format, in list/grid views, or even simple summary lists/spreadsheet-like views.

Multilingual searching

Yes. No limits.

- MINISIS was the first multilingual HDBMS in the world.
- Most M3/MINT users will have a field like the City of Ottawa does for Material_ENG and Material_FRE. So that when a client picks “os” in the MATERIAL_FRE it will put the word “Bone” in the MATERIAL_ENG field. So that when a client searches for “os” they can be presented records with the words/mots, “bone” or “os” in them.
- Some clients make use of our add-on multilingual thesaurus product called “STEMMA”.
- Some clients make use of our add-on dictionaries (English, French, Spanish, and Portuguese) where they pull or attached to the term in the dictionary.
- The client can choose the level of linguistic inclusiveness they desire/can afford.
- Our core system can look for any work or term in any language and search the database regardless. It is the user that must determine which of the above options works best for them (e.g. dual fields for materials, thesauri, dictionary, et al).
- Our system interfaces come in French, English, Chinese and Arabic.

Report styles included

Yes. No limits. Every user creates reports and often MINISIS creates reports for clients. As a result, these reports are left into the system so all users can take advantage of reports created from the generic tool as well as client-specified report outputs. There are over 100 report formats in MINT/M3, and even more when you consider our archival and library modules. Reports vary from the traditional accessions register, intake receipts, collections and catalogue-based reports, enquiry and specific reports for processes like conservation, rights and reproduction, movement, and so on.

Report customization

Yes. No limits. Two report generators come with the software so users can add, change, or remove any report they wish.

Report program

MINISIS includes two report generators inside the system. Data can be exported via the Exchange or Report Modules to any other report generator as well.

Museum functions

Collections management function overview

MINISIS supports all major and Spectrum-related collection management functions and processes. MINISIS M3 can be used to manage any cultural, historical, social, documentary, archival, art, or bibliographic collections. These collections can be physical or virtual. The collections supported (screens, menu and processes for) are: archaeology, art gallery, public art, numismatic, philately, social, natural science, industry and tech, oral history, zoological, and historical property management.

Registration

Yes. Registration is fully supported. Again, MINISIS has MINT, M3, and M3 ONLINE solutions for typical cultural institutions. Each product has a different level and degree of registration. The most sophisticated registration database in the MINISIS suite of products is MINT where there are over 1000 fields available to register an object into the institution. The institution can enter any possible acquisition, and prepare and store initial documentation on the proposed acquisitions, loans, and related holdings. There are fields for basic acquisition details (ex. source, method, dates, et al), the ability to add any amount of catalogue details for the potential acquisition (or new accession), loan and exhibition details in case it is not part of the permanent collection, to fields for acquisition justification and managing all related documentation, like loan agreements, receipts and deeds of gifts, accession registers, and other reports.

Acquisitions

Yes, acquisitions and registration are fully supported. Acquisitions and registration are often the same process to many institutions. At MINISIS the institution has the ability to decide whether it engages separate or the same process for new collections and objects potentially entering the institution. The Acquisitions module supports all of the Spectrum collections management standards.

Inventory management

Yes, inventory management is fully supported. Inventory management is part of the movement and tracking process of M3. Inventory management, in particular, is focussed on validating and verifying the location data that is in any record. The users can perform and capture information on a spot check or full inventory verification basis. The system can track all aspects of inventory, and the repeating group fields allow the user to see all past inventory management activities and when, how, and who performed the inventory checks.

Internal tracking

Yes, internal tracking is fully supported. The M3 applications come with a robust movement and tracking process and workflow to aid the institution in the location tracking of its objects, its loans (in and out) and related holdings. The system is configured by default with the ability to store a permanent location, planned moves, and current location details for any objects/items in the collection. The system enables the clients to perform inventory checks, global update (ex. move everything from conservation lab to the new preservation office, or move from Building 1, Floor 1, Room 2 to Building 4, Floor 1, Room 3 on December 1st), and schedule moves according to the movement/tracking activities being undertaken. M3 Location and Tracking is integrated for the movement of any part of the collection (or entire collections, as need be). Whether the movement is internal or external, on an object from the permanent collection or a loaned travelling exhibition, the default system will support (via workflow and a “location authority”) the location and tracking of any object.

External shipments

Yes, external shipment information is fully supported. External and internal tracking are the same regardless of whether the object is moving inside or outside. The same processes and location authorities are used, and for external moving objects, the system allows the user to enter the place of shipment, log the shipping details from costs, to tracking ID, to the physical delivery location. Loan and catalogue details are attached to the record and the system enables the institutions to be able to store and track all relevant data with the shipment.

Cataloguing

Yes, all aspects of museum, art gallery and historical centres are fully supported. M3 is able to be used for any type of collection. Whether the institution has art and monkeys, photographs and masks, or whether it is just a collection of social history objects – M3 can allow the users to use the documentation standards and related rules to catalogue objects in the database. Whether the objects are in the same domain, identical, or totally unrelated, the software can be configured to allow the user to enter diverse objects with diverse standards for documentation. M3 has all of the major standards supported (ex. the old CHIN dictionary, the new Spectrum standard, CCO, etc.). In the product overview, MINISIS included information on the main modules and components of M3.

Conservation

Yes, all aspects of conservation, examination, proposed treatment, and treatments are supported. Conservation in M3 is a fully integrated activity with the catalogue record. The conservation module was based on all of the previous Spectrum versions, and for the current object condition checking and technical assessments, along with conservation and collections care. Also, the conservation module has a link to the Incident Tracking Module (ITM). ITM allows others (ex. the security desk) to request immediate action/work order on an object that is on display. All MINT applications contain the conservation data elements required to fully annotate and store all examinations, proposed treatments, and actual treatments made to any of the books, rare books, maps, textual/paper documents, and three-dimensional objects. Via a repeating group field containing over 90 individual fields exist to capture all conservation details, plus notes and history of all conservation processes and assessments made on the object. In addition, images and documents concerned with conservation activities can be linked to the description records. The conservation components as shown from MINT/M3 are focused around the main assessment page, which asks the user if the data/work to be entered is an examination, proposed treatment, or actual treatment. Information for any of these three default conservation activities are supported with fields to track the history of all conservation processes throughout the object's life.

Curatorial research

Yes, there are numerous fields to capture local or your own research and localised curatorial/research details. The software has numerous fields available to capture related materials and research performed on the object. M3 also has a research module exclusively designed to capture details found researching the object. The system allows theses, reports, bibliographic materials, and electronic files to be attached to the object‘s record to store endless sources of research performed on or related to the object. The system also has links to projects and publication databases to ensure all aspects of collection management can come together to provide and house internal research details.

Publications and printed material

Yes, publication and bibliographic data are fully supported. M3 has a complete publications database which enables the user to link and store data from online and printed publications. The software

captures all standard bibliographic details (MARC or non-MARC formats) and enables the user to attach everything from the publication, to information about the publication, or publishers.

Rights management and reproduction

Yes, rights management and reproduction are fully supported. The separate rights and reproductions module will enable the institution to store all copyright details (on the object, on the digital producer, etc.), who is responsible for the copyright management, the costs (licensing and reproduction of the objects), and usage restrictions. There is a complete ordering module included and requesting capability included in the system. It should be noted that MINISIS Inc. also provides one of the few totally complete and integrated Trusted Digital Repositories (TDR) that will house both content from M3 (ex. catalogue details, copyright, et al) and merge it with the digital assets to create a total TDR/DAM that will ingest, preserve, and track usage of the digital assets in the museum or from those attached to the object records.

Risk management and valuation

Risk management, like conservation, movement, and valuation is a universal process across the MINT applications. Risk management keeps track of everything from packing and handling perspectives, as well as light exposure limits, to temperature monitoring, and so on. Risk is assessable at the registration level to ensure the institution knows and understands the risk and potential cost (time, money, resources) to maintain and manage the item. The risk screen is linked to the object record via the conservation module.

Exhibitions

An exhibition is put through the process of a loan out. The philosophy that while on exhibition, the records are indeed “loaned out” to the exhibition and cannot be easily removed without some consequence (ex. getting the object back, finding a replacement and so on). The user selects “Type” and selects either “Internal Exhibition” or “Outgoing Exhibition”. Other details should be entered, including fields for external or in-house contact, location, and expected dates of the exhibition in step two of the process. Then the user can enter details relevant from costs, shipping details, insurance, documentation, and exhibition details.

Loan management

Again, in M3, loans and all movement activities are universal so objects, items, and titles can be attached to loans individually or in bulk. M3’s fields and loan procedures allow the institution to have a fully documented loan management process respecting standard requirements for any items loaned. Again, MINISIS believes that by seeing the screens, the reader can procure a clear idea that it exists and all aspects for managing loans in and loans out are available in the software.

Deaccessions

Yes, the deaccessioning of an object is fully supported in the system. Clients have two options when setting up their system with respect to deaccession:

- The user can deaccession in the registration or acquisitions module or
- Deaccession the record as part of the catalogue details of the object.

For instance, in M3 the user can perform option 1 or via option 2. There is a separate screen to capture all the aspects of deaccession including: the type of deaccession (via auction, sold, transferred/exchanged, or destroyed); along with large text fields to capture details on how the object was deaccessioned; along with details to whom, by whom, and when; along with costs associated with the deaccessioning of the object.

Digital asset management

MINISIS for Windows (SMA) allows images, documents, audio, and video file references to be attached to database records for display on worksheets, reports, and the OPAC. The file reference can be in the form of a UNC name, file share name, drive path, MINISIS virtual directory (which represents a UNC, file share name, or drive path), or in some cases a URL.

The user could use our Trusted Digital Repository (TDR) as well to store images and have content imported to the digital product to ensure that when a digital asset is used, it has both the technical details of how it was created (ex. formats, resolution, typical OAIS fields) and content from the CMS to ensure everyone knows this is your asset and trusted. Remember the issue about whether or not emails were stolen? My questions from the outside would have been to ask if someone could actually verify those emails were authentic. Only a TDR would have helped with that assessment, as you could prove whether or not the emails had been tampered with. Again, images or any media file (video, audio, text, office suite products, PDF) can be attached to a MINISIS record. The OPAC or Portal would simply call the record and its file path to show the media file with the text on the web.

Attaching image files via a File Reference button

In the MINISIS database, a field is designated to hold the path and filename of an image file. The path can be a standard X:\images\23q5.jpg window pathing or a URL (eg: https:\\minisisinc.com). There can be none, just one or repeating to allow 1 to 12000 media files attached to a database record. A “File Reference” button will appear next to or beneath the image file field on the application worksheet. This button may be labeled “Find Image” but more frequently it can be identified by the image of a paperclip.

The path of the image can be a URL, UNC name, share name, network drive, or a MINISIS virtual directory which can represent any one of these paths. The path of the image in this example is represented as a virtual directory, i.e. [M3IMAGES]. While MINISIS will write the full path to the field if

no virtual directory is defined for the folder that holds the image files, we strongly recommend that you define a virtual directory for this folder in the MINAdmin utility. This ensures that if the image files are moved to a different folder and/or drive, the path does not have to be changed in all database records. Instead, the virtual directory is redefined in MINAdmin.

Image file paths and names can be pasted or typed directly into the designated image file field without using the “File Reference” button. The “File Reference” button is present to make it easier to locate the image and paste the path and name into the field. When the image file path and name are pasted to the image file field, MINISIS will load a thumbnail of the image into a “Thumbnail Image” box that usually appears next to the image file field and “File Reference” button. This thumbnail image will appear whenever the worksheet is opened at this page, as long as the image file reference is in the image file field and the image can be located by MINISIS, i.e. the path is still valid. “Thumbnail Image” data boxes may appear on any page of a worksheet but cannot be added or deleted, other than by changing the path of the image in the image file field. Any image file name and path can be written to the image file field on the record worksheet. However, the image file must be in a valid location and valid format in order to be displayed in the “Thumbnail Image” data box. If MINISIS can’t locate the image or if the image is not in a valid format (ex. it is .bmp, instead of a JPG, (for example), MINISIS will return an error message indicating that the thumbnail of the image can’t be loaded, i.e. displayed.

Attaching URLs as image file paths

In MINISIS, image file paths in the form of URLs can successfully be displayed as thumbnails. When entering a URL in an image file field:

- Don’t use the “File Reference” button. Type the URL or copy and paste it into the field.
- The URL must begin with http:// or https:// and end in an image file format extension that is recognized by MINISIS and the file management system.
- If you copy and paste the URL into the field, you must press tab or touch another field with your mouse in order to see the thumbnail displayed, until you click the save record button.

Again, whatever image, video, audio, or text/office product is attached on this screen, MINISIS-built OPACs would simply call the media file and display it in the HTML version of the record on the OPAC.

M3 can be fully integrated with the Titan Trusted Digital Repository (TDR) which was constructed off the OAIS standards. That means the Titan TDR, if used, reads media file content and ingests, preserves, and manages several media types (ex. audio, video, image and text/PDF). The TDR reads all technical specifications of any major media file to ensure the media file can be managed and avoids bit rot and obsolescence. The TDR manages ingestion, preservation, and accessibility to the digital assets and their derivatives. With the MINISIS Trusted Digital Repository, you will be able to follow an easy step-by-step approach to digital preservation:

1. Prepare

Preparation activities usually involve discussions about immediate and long-term TDR priorities such as storage restrictions, preservation formats, and public access. Understanding these requirements helps to establish critical management tasks and settings. At this time, it is also helpful to know what additional types of information will be stored alongside the asset as metadata. If the digital collection is to be linked with another cataloguing system, planning for data mapping and customization prior to ingestion ensures a smooth transfer.

2. Ingest

When new files are ready for ingestion, they are sent to a queue in the MINISIS TDR's loading dock. Related digital assets can be set up as a job, allowing them to be assigned a common job number and job title, as well as descriptive metadata for future discovery and retrieval purposes. Each raw digital asset is processed to identify checksum information, extract technical data, and characterize the asset. Once ingestion is complete, the digital asset is stored with its content, provenance, and preservation metadata — as an Archive Information Package (AIP).

3. Store

Storage mechanisms for a MINISIS TDR are largely client-specific. Public access and reproduction requirements will help determine the TDR's storage and connectivity specifications. Customers using the MINISIS TDR as a service can store their AIPs in cloud storage, or they can opt for a dedicated storage appliance when safety is of the utmost importance. Standalone systems at a client site are also a storage option.

4. Preserve

Preservation strategies are routinely implemented in a MINISIS TDR and can be managed automatically or manually. Normalization settings identify current file formats that will be converted for preservation, preview, web, and print. As time passes, these settings are updated to convert obsolete file formats to contemporary ones. In addition, obsolescence and fixity help you to effectively manage your long-term asset preservation.

5. Manage

Cataloguing and search fields help to identify and retrieve the assets that are stored in the TDR. Even if digital assets are ingested into the TDR in large batches, information about each asset can be managed individually. These information management features are aligned with Open Archives Initiative (OAI) and Dublin Core standards. By initially using standard cataloguing fields, the assets' intellectual content can be mapped with data in MINISIS applications and other collection management software. However, the MINISIS TDR can also operate as a standalone cataloguing system.

6. Access

Many museums, libraries, and archives are mandated to make their collections publicly accessible via digital and online platforms. Web-ready formats of preserved digital images can be linked to Online Public Access Catalogues (OPAC). Print-ready formats can also be generated and stored in the MINISIS TDR. Appropriate role-based security procedures and permissions can be set up to provide internal and external TDR users with safe and secure access to your digital collection.

Additional features and functions

MINISIS could list a long list of additional features, functions and capabilities that have not been addressed in the previous points. Additional details can be found on the MINISIS Inc. website (www.minisisinc.com).

MINISIS has a complete development suite to use the same toolkit that was used to create the CMS can be used to create any database.

Yes, you could buy MINISIS and M3 and build your own fundraising database or your own human resources or timesheet database/application. There is no charge if you have a legal license.

There are several predefined/COTS applications available including:

- MINISIS Management for Libraries (M2L) that is a complete integrated library system.
- MINISIS Management for Archives (M2A) that is a complete integrated archival system.
- MINISIS Management for Museums (M3) that is a complete integrated CMS system.
- STEMMA – A multilingual thesauri building tool that performs over 10 linguistic related checks
- Standard MINISIS Application (SMA) to build any database and applications you may require
- And complete services for everything from analysis, design, data conversion, customisation, training and web/OPAC services to build some of the best online search interfaces on the Web.

M3 by MINISIS Inc. - Evaluation

About this evaluation

This evaluation was performed on January 31, 2018 with a representative from MINISIS. It was evaluated by 11 members of the museum community and reflects their personal opinion. These evaluations were based on a set list of tasks in a limited period of time. It is always recommended that you request a demonstration of any product in which you may be interested based on your specific requirements.

Evaluator ratings

The following table shows the ratings given to this software by members of the museum community. To understand what these ratings mean, please refer to our Scoring System & Evaluation Guide.

Each rating given is scored out of a maximum of five points. The larger the Standard Deviation number, the wider the range of scores for that task.

Task	Average	Standard Deviation
Online data entry	3.5	0.9
Publish a record to the web	2.8	1.1
Set user permissions and groups	3.3	0.5
View audit trails or change log	4.0	0.6
Import data	3.5	0.8
Export data	3.4	1.0
Create a local terminology list	3.4	0.9
Upload or attach images and files	4.0	0.8
Catalogue an object	3.6	0.9
Batch modify a set of records	2.7	1.2
Multilingual capabilities	4.0	1.2
Customize a catalogue entry page	3.5	0.8
Create a template record	3.2	1.3
Generate and/or build a report	3.2	0.9
Perform basic search	3.6	0.9
Perform advanced search	3.6	0.9
Browse records	3.0	1.0
Create an exhibit	3.5	0.8
Enter condition report information	3.4	0.8

Evaluator comments

The following comments have been provided by our evaluators after they rated the performance of each task. These are selected comments drawn from the “Additional Comments” section of the evaluation form.

- Seems much less “polished” and less user-friendly than some systems in terms of user interface – but perhaps more powerful/flexible.
    - MINC: We understand that user interface is a personal preference. We have to build a complete system with all fields and processes. As a result sometimes, the interfaces look quite large and limitless tabs and links. That can make for a ‘busy’ interface that means there is always a sacrifice between looks and functionality. We opt for functionality as the screens, reports and web interfaces can be changed with the toolkit in the software. However, we are surprised that our web interfaces are considered “less polished”. As the web interfaces are made to match a client’s existing web presence. We have no control over the client’s branding and look and feel.
- Registration database links Archives system (RAD, DACS, EAD), Library system, Museum system.
    - MINC: Yes. MINT is designed to be an integrated cross cultural solution where a “big box of mixed assets” can be accessioned and documented thereafter according to the documentation standards of the asset in hand.
- Can be accessed on tablet, phone.
    - MINC: Yes. We are happy you saw that capability.
- I liked this product a lot. I like that it has flexibility for the user.
    - MINC: Thank you for your feedback! We are glad you could see that we try to give 100% control to the client to manage the data and media to fulfill any museum process you require.
- The software is not user friendly at all, it’s an old interface that never changed from the 1990s. The multilevel fields are not showing below each other just showing that 1 of 3…
    - MINC: Again, thank you for your opinion. However, in MINISIS you can show repeating occurrences of repeating content in the same or repeating nested groups in two ways. As this evaluator state once occurrence after another occurrence or via a group list box presentation format. There are no other ways to show that without limiting the ability to see all of the occurrences in a field. The interface was updated in 1990, 2000, 2010 and 2018. And the web software has received praise from others, so we will try to ensure our interface keeps improving. However, the “old interface” is not web based like M3_ONLINE. We recommend that if you don’t like the desktop interface, please look at the M3_Online web-based interface as it may be more to your liking.
- The Museum Admin would need to be a tech savvy person. I do not recommend this software.
    - MINC: That is a surprising comment given our thousands of users do not consider themselves IT professional but subject matter experts (eg: Curators, Conservators, librarians, archivists). Our premise is that you can have a hosted solution where you do nothing or an on-premise solution where you do manage the software yourself. However, the goal of MINISIS is to put the power of technology in the hands of the users. Obviously, we failed during the demonstration to show the ease of using the system management tools. Users come from all backgrounds and experience and education levels. However, with familiarization and some training most users find the system tools easy to use and fulfill their CMS requirements.

- For a small organization with only a handful of employees it seems clunky to need two separate applications, the administrative module and the search/data entry module to manage information. However, this would be beneficial for a larger organization that could make use of sophisticated user permissions controls.
    - MINC: Appreciate the feedback but again, you are only comparing the M3 desktop model. And you don't have to use the administrative module. That is the Database Management System. The fact that we showed the Database Management System was to show how you could change the screens, reports, forms. With a limited time, we obviously did not get enough time to help you appreciate the differences between the DBMS and the application.
- While the main user-end database software appeared simple to use, the corresponding back-end software seemed inaccessible, with an interface geared more toward developers than end-users.
    - MINC: Again, in a limited time scenario we have to rush and not get to fully explain the software. However, remember the back end is like Oracle, SQL Server or other such Database Management Systems. They often look daunting, but we believe the AI interface to MINISIS allows for users of no technological background to fill in blank, click check boxes and pick from lists to build their databases. This capability is normally considered one of our strengths. However, point taken, and we will keep this in mind as we continually modify the system!
- Looks like a big, powerful program that can do pretty much everything you would need. But also looks like a slightly higher learning curve than some products, with the separate developer tool. The great ability to customize with that tool also adds complexity. But it seems like it would be really good once you had a couple of people who learned how to use it.
    - MINC: thank you for the feedback, we appreciate it.
- Strongest one I have seen on multi-lingual capabilities.
    - MINC: Thank you. We believe given MINISIS was one of the first complete multilingual database management systems in the world, it is something we pride ourselves on. Indigenous languages are an area of focus currently.
- I was impressed by the functionality of the system, but not by its usability. The visual interface was clunky and off-putting. One of our common user complaints about our current system is that it feels old, like they have to learn something old to do their jobs. The MINISIS interface feels even older than what we have currently. I assumed we were looking at the onsite version of MINISIS, not the web-based version. I would be interested in seeing the web-based version. If that was it, then we would not pursue this system.
    - MINC: Yes, desktop interfaces are just that, 'older looking'. Please look at our M3_ONLINE we think you will like the interface a lot more intuitive, "prettified" and have a more pleasant user experience overall.
- Heavy use of back-end "Development Tool" to manipulate data and worksheets, which seems quite specialized for most potential users. Is there a manual available for users to aid in making these changes?
    - MINC: Yes, we have complete manuals for the application and the database management system. Typically, a user can be trained in 3 days to learn the basics from

database construction to changing the screens and presentation layers. There are videos, there are cheat sheets and of course full, detailed electronic manuals to guide any user through the “back-end”.

- Overall, I think MINISIS is a user-friendly platform, would allow us to streamline a lot of processes. The fact that it’s a Canadian company is a nice perk.
    - MINC: Thank you! Being innovative in Canada is challenging so we will take you comment as inspiration and verification we are doing a good job. We realize you cannot be everything to everyone. We know you cannot show everything your software can do in an hour or two. However, we are so lucky to receive comments that are constructive and help motivate us to continue to do what we do!

PastPerfect Museum Software Version 5.0 by PastPerfect Software, Inc. - Profile

Note

This profile was completed by the software vendor at CHIN's request and does not reflect the views or opinions of CHIN. It is presented for information only and does not indicate approval or accreditation by CHIN. Inclusion of specific products does not mean that CHIN recommends the software, but that members of the community expressed interest in learning about these products.

This information was accurate as of January 2018. For more information or to request updated information, please contact the vendor directly.

Product name

PastPerfect Museum Software Version 5.0

Vendor name

PastPerfect Software, Inc.

Vendor overview

Website URL

http://www.museumsoftware.com

Head office

Exton, Pennsylvania, United States
Year founded: *1996*
Telephone number: *800-562-6080*
Fax number: *610-363-7845*
Email: *support@museumsoftware.com*
Contact person: *Brian Gomez, vice-president*

Canadian/North American office

Exton, Pennsylvania, United States
Year founded: *1996*
Telephone number: *800-562-6080*
Fax number: *610-363-7845*
Email: *support@museumsoftware.com*
Contact person: *Brian Gomez, vice-president*

Product overview

Product description

PastPerfect 5.0 is the most affordable and most utilized collection management software on the planet. Sold as an inexpensive desktop solution, PastPerfect 5.0 is an all-in-one package that combines Objects, Photos, Archives, and Library catalogs as well as Accessions, Loans, Exhibits, Online Public Access, and even Contacts, Membership, and Fundraising Management.

Disciplines supported

- Objects: Archaeology, Art, Geology, History, Natural History
- Photos: Documentary and Art
- Archives: Archive Collections, Maps, Music Collections, Oral History
- Library: Book and Research Collections
- Contacts Management and Fundraising
- Membership, Dues, and Volunteer activities

Product launch date

PastPerfect 5.0 was released in January 2010.

Product history

PastPerfect 2.0 was released in 1998, and was followed by Version 3.0 and 4.0 in 2002 and 2005 respectively. PastPerfect 5.0 was expanded and released in 2010, and is updated several times per year. As of fall 2017, our current version is 5.0E7. With each release, new features and additional cataloging capabilities have been added.

Future development

Frequent updates are provided to PastPerfect clients at no charge. These updates address usability issues submitted by the PastPerfect Community. As our flagship product, it will receive a major overhaul in the near future after the release of our new Web Edition software.

Demo version

A trial version can be downloaded from our website. The trial version is free and functions just like the real software, but is limited to 200 records. Upgrades, such as Multimedia, are enabled in the evaluation version and the trial never expires.

- # Support

Support methods

- On-site
- Online
- Chat
- Email
- Phone

Support language(s)

English

Support availability and hours

9:00-5:30 Eastern Time, Monday-Friday, and special hours by appointment.

Support fees

Annual Support Service is optional. Prices are charged either per single user or per network of 10 users.

Client support network

There are several client networks that are based on both locality and collection type. These networks work independently of our company, though we encourage their use and feedback.

Training

Training classes are held quarterly via webinar. We offer on-site training by request.

System updates and maintenance

Updates are distributed free of charge as frequently as monthly. These updates offer new features as well as software fixes and are easily downloaded and installed from our website.

- # Cost

Pricing

Complete pricing in USD is available at our website:
http://www.museumsoftware.com/pricing.html

PastPerfect Version 5.0 is a lifetime license and requires no annual fees. Optional upgrades can be added at any time and include:

- MultiMedia Upgrade
- Network Upgrade for 5 Users
- PastPerfect Online (web based public access)

Maintenance costs

No ongoing maintenance or licensing costs. Updates are free of charge. Major upgrade releases of the software do cost money and are released every 3-7 years.

Additional fees

Annual Support is optional. Online hosting of PastPerfect Online is also optional.

- # System specifications

Operating systems supported

Modern Windows Operating Systems (Windows 7, 8, 10, etc.).

Underlying database

Microsoft Visual FoxPro 9.0.

Platform(s)

PastPerfect 5.0 is a Windows based program.

Hardware requirements

Suggested

- Intel Pentium 4, 2 GHz+ processor
- 3 GB RAM for Windows Vista, Windows 7, Windows 8/8.1, and Windows 10
- 17 inch colour monitor (minimum 1024x768)
- CD/DVD-recordable drive
- High-speed Internet access

Staff requirements

No technical staff is required for setup or support. Most PastPerfect administrators and users are museum professionals with limited technical experience.

Plug-ins and/or modules available

PastPerfect Online (Web Based Public Access) is the popular way to create a searchable collections based website. It is developed and supported by PastPerfect. Inventory Manager is also available to help organizations manage and perform their inventory processes. Additional products and information are available at our website.

Third-party requirements

Optional

Microsoft Word for letter writing capability within the software.

Interoperability

Not applicable.

Accessibility

Yes, using Windows features and additional software for accessibility.

Customization

PastPerfect offers custom views with customizable fields and can be altered by the user. New features and additional databases are created by PastPerfect when clients submit ideas that would prove helpful to the museum community.

Web integration capabilities

Cloud functionality

PastPerfect 5.0 is a desktop/Local Area Network solution, but utilizes cloud functionality for its public access component, PastPerfect Online.

Server location
AWS Northern Virginia.
Security protocols
Public Access HTTPS.
Typical or average uptime
Over 99.9%.
Back-end maintenance procedures and downtime
Typically less than an hour per month and typically done outside of normal business hours.

Browsers supported

All modern browsers.

Web-based access for data entry

No. PastPerfect Online is a surrogate database designed to provide public access to collections, while protecting the museum's data from unauthorized web access. PastPerfect Web Edition is offered as our online data entry solution and will be released in 2018.

Web publishing platform

PastPerfect is capable of publishing collections data to the web through both Virtual Exhibit and PastPerfect Online. Virtual Exhibit is a tool used to create small HTML based curated exhibits of artifacts. PastPerfect Online is a fully functional research portal for PastPerfect records. Detailed information about these products can be found on their website. Clients have full control over the records and the fields that are published online.

Linked open data functionality

We continue to provide interoperability between repositories associated with DPLA, state level aggregators, and more by developing custom export tools for each repository.

- ## User groups and security

User profiles

Each user can have a user profile with specific permissions based on their group. Multiple users can access the program and edit records in the same catalog, but not the same exact record. Records are locked when being edited by a user on the network.

User groups

Security is set up for ten different groups that can each have an unlimited number of users. One of those groups is the Admin group.

Visitor profiles

Some organizations choose to create a "Visitor Group" to allow public access to the PastPerfect program.

Installations

With a basic network license, PastPerfect can be installed and used on five workstations. With an Unlimited license, PastPerfect can be used by 25+ workstations on a network.

Audit trails and/or edit history

PastPerfect retains data regarding when a record was last updated and by whom.

Offline access

PastPerfect is a desktop software and does not require web access to function.

Privacy features

Not applicable. Privacy and security of data is part of the institutional network setup.

- ## Data migration and stability

Import formats

PastPerfect offers custom conversion services to import data from all types of legacy software. Free quotes are provided by our staff. In addition, users can import from FoxPro, dBase, Excel, and ASCII.

Export formats

FoxPro, dBase, Excel, ASCII, XML, Dublin Core XML, and custom exports are accessed directly through the user interface. Users have full control over their exports.

Backups

PastPerfect uses zip compression to backup up to local and remote drives as well as optical media. PastPerfect can be backed up to many cloud based storage solutions. By default, PastPerfect saves the last thirty backups on each workstation. Users are prompted to make backups when they exit the program.

• Standards and schemas

Metadata schemas

PastPerfect exports Dublin Core XML and other custom export formats by request.

Data content standards (cataloguing rules)

PastPerfect incorporates many of the fields required for a variety of different standards, then focuses the export to make that data available to larger repositories.

Vocabulary standards

Nomenclature 3.0 is included and an upgrade to Nomenclature 4.0 is available. All other vocabulary provided by an array of authority files that can be manipulated by the user.

Local terminology lists

Customizable by the user, these vocabularies are provided by an array of authority files.

Accreditation

Not applicable.

• Data entry and content

Media upload/linking

Media files of all types can be attached to PastPerfect records for all four catalogs, contacts, accessions, and more. Images can be uploaded in batch by selecting a folder and highlighting image files.

Media formats supported

All types of files, no restrictions on size or type.

Data entry features

Copy and paste
Yes, using keyboard shortcuts.
Search and replace
Yes, using Global Update and Catalog Lists. Also, several automatic global replacement based changes to some authority file entries like people's names.
Spellcheck
Yes, customizable by the user to select which fields are checked for spelling. By default, we use an English dictionary and words can be added or removed by users.
Bulk cataloguing
Yes, ability to add a range of Object IDs and create records based on a template.
Batch edit
Yes, for most fields using Catalog Lists, Inventory Manager, or Global Update.
Batch location change
Yes, by way of Query, Catalog Lists and Inventory Manager.
Duplicate record search
Yes, standard reports allow for easy reporting and assistive cleanup of duplicate records.
Template record
Yes, each user can identify their own template record for each catalog.
Date selection and formats
Yes, most date formats are available for selection in setup.
Mandatory fields
PastPerfect has a few mandatory fields (Object ID, Object Name) and users can expand mandatory requirements by locking fields to Authority File Verification.
Others
No response.

Spreadsheet editing view

Yes. Similar to a spreadsheet view, PastPerfect 5.0 has "Browse" that allows users to view and edit most of the fields in what looks like a spreadsheet presentation. These views are customizable and can be locked to reduce errors associated with this type of data entry.

Geographic mapping

Yes, fields are available for point-based geographical mapping of both addresses and georeferenced positions.

Multilingual fields

PastPerfect 5.0 uses English labels and instructions. We suggest users who wish to have multilingual capabilities make use of the custom fields in the program. These fields can be renamed with non-English labels and support an extended character set.

Barcoding

Yes, PastPerfect Barcode Printing Upgrade allows users to create and scan labels to simplify navigating to digital records and improve the accuracy of inventory projects. QR codes can be generated from the program for artifacts. No specific plug-ins or additional equipment are required.

Labelling

Yes, labels of all kinds can be generated with PastPerfect 5.0 using both pre-built reports as well as Report Maker reports. All labels can also be customized.

- # Search and reporting

Types of search supported

- **Field Search:** Search any field for any term.
- **Keyword Search:** Cross catalog and cross field searching.
- **People and Search Terms Search:** Facilitates topic and genealogical related queries.
- **Lexicon Search:** Determine the number of specific types of artifacts in the collection.

Boolean queries
Yes, Boolean AND/OR is available as well as more complex parenthesis order based Boolean phrasing used for field searching.
Query any field
Yes, each catalog has a find and a query function allowing records to be searched on any field in PastPerfect.
Sort query results
Yes, simply clicking the display field title will re-order the results by that field.
Saving search results
Yes, both queries and reports can be saved for future reporting or modification.
Filter search results
Yes, both through the query and the catalog list sections of the program.
SQL-based search

Not applicable.
Export search results
Yes, both through the query and the catalog list sections of the program. Search results and reports can be saved to Excel with either standard or extended fields.
Free-text (Google) searches
Yes, both simple and advanced when mixed with Boolean commands and wildcards. Additionally, users may setup this feature to add or remove fields that are indexed for this type of searching.
Search result views
Yes, screen views and reports can be customized by the users to meet their needs.

Multilingual searching

Not fully supported at this time.

Report styles included

PastPerfect uses over 350 preprogramed reports that include a variety of address labels, barcode labels, catalog cards, full sheet reports with images, value reports, location reports, repatriation, and more. Each of these reports has a standard layout and the ability to customize two different layouts of the report form. Additionally, each of these reports can be saved as PDF.

Report customization

Most organizations use our custom form options to modify their own forms, though annual support customers often receive assistance from the support team. All standard reports, of which there are several hundred, can have two different custom layouts. Report Maker Reports are also fully customizable by the user.

Report program

PastPerfect has prebuilt reports that meet most user needs. In addition, each of those reports can be customized using our built-in form editor. Our Report Maker tool is also built-in allowing organizations to create their own custom reports for each area of the program.

- # Museum functions

Collections management function overview

PastPerfect is a relational database designed with screens that allow easy data entry and access to all aspects of a collection. From Temporary Custody, through Deaccession, the

entire life cycle of an artifact can be tracked and searched. Temporary Custody holds items that are being considered for accession or loan. The Accessions view connects items with donors and records information about the gift. Loans tracks the incoming and outgoing loan of artifacts and the relative paperwork associated with those functions. Individual catalogs for Objects, Photos, Archives, and Library capture the specifics of each artifact and its movements over time. Deaccession tracks the items that are no longer considered part of the collection.

Registration

Registration and proper cataloging of all types of items is at the heart of what PastPerfect is all about. We use hundreds of fields across the catalogs to help document everything from provenance to appraisal history over the course of an artifact's stay within the institution.

Acquisitions

PastPerfect tracks several types of acquisitions including incoming loans, temporary custody, and accessions. These records can then be connected to the contact record of the donor. The software uses Microsoft Word to automate and generate the forms and correspondence critical to professional standards.

Inventory management

Besides the basics of recording what has moved where, PastPerfect also offers an Inventory Manager upgrade that allows users to print reports and inventory large numbers of artifacts based on their current location. This upgrade includes Barcode Printing, allowing organizations to further reduce their cataloging efforts while increasing the accuracy of their inventory procedures.

Internal tracking

Each catalog record has seven fields to describe the item's home storage location as well as seven fields to describe the temporary location. Any change to one of these fourteen fields triggers an automatic capture to location history. Location and update history are unlimited in PastPerfect and provide a complete picture of who has moved what, where, and when.

External shipments

Outgoing loans has fields specifically designed to track shipment and carrier information. Fields for shipping dates, insurance, carrier, and crate list on the Shipping & Insurance screen help track external movement of items.

Cataloguing

PastPerfect has fields, forms, and tables dedicated to Art, History, Geology, Natural History, Maps, Oral History, Music Collections, Archaeology, and more. In addition, Custom areas of the catalogs allow organizations to customize a section of each catalog to their own specific collection needs.

Conservation

An unlimited number of condition reports, as well as a section designed for maintenance scheduling is included with the PastPerfect basic program. Condition reports, as well as MultiMedia links can be used to include images and documentation of conservation work. In addition, we suggest using notes and custom fields to further describe conservation treatments and concerns.

Curatorial research

Searches of all types, querying nearly every field in every area of the database, can be performed within or across all catalogs. This includes Keyword Search, Field Search, People Search, Search Term Search, and Lexicon Search. In addition, PastPerfect includes its own built-in Report Maker allowing most fields and all related data to be printed or exported on demand.

Publications and printed material

PastPerfect has the ability to track associated publications, notes on associated material, as well as relational links between associated records.

Rights management and reproduction

Each catalog record has copyright and legal fields as well as the ability to select the appropriate copyright description from the site.

Risk management and valuation

Each record in PastPerfect has information to track status, value, last assessment, insurance value, insurance policy and more. In addition, Loans and Accessions can also record values and insurance information.

Exhibitions

PastPerfect has an Exhibits section, which tracks future, current, and past exhibits. Fields such as humidity, location, visitor traffic, and cost/revenue, as well as exhibit history for each artifact allow a user to see what items have been or will be on display.

Loan management

Both Incoming and Outgoing Loans are included with the base product. Loans can be tracked and maintained on the macro level with simple descriptions of the items in the loan, or far more in depth with each loaned item being represented inside of the PastPerfect catalogs of Objects, Photos, Archives, and Library.

Deaccessions

Deaccessions is a catalog in PastPerfect that facilitates the management of the deaccession process and maintains permanent records for the items that were previously part of the collections. Fields such as reason, deaccession date, and authorization help maintain transparent and complete deaccession data.

Digital asset management

Many of the features associated with DAMS based functionality, presentation and storage are contained in PastPerfect with the inclusion of the PastPerfect MultiMedia Upgrade. Each catalog record can have up to 999 discovery images attached. In addition, each record can have an unlimited number of associated digital files attached and stored within the PastPerfect software; thus allowing everything from Oral History recordings to detailed condition reports to be digitally housed and accessed through a single program. By adding PastPerfect Online, many of these digital assets can be accessed via the Web.

Additional features and functions

Contacts, Membership, Donations, and Fundraising solutions are built into the basic package at no additional cost and are integrated with the collections management side of the software allowing users a complete picture of a patron's interaction with the museum.

PastPerfect Museum Software Version 5.0 by PastPerfect Software, Inc. - Evaluation

About this evaluation

This evaluation was performed on March 2, 2018 with a representative from PastPerfect Software, Inc. It was evaluated by 12 members of the museum community and reflects their personal opinion. These evaluations were based on a set list of tasks in a limited period of time. It is always recommended that you request a demonstration of any product in which you may be interested based on your specific requirements.

Evaluator ratings

The following table shows the ratings given to this software by members of the museum community. To understand what these ratings mean, please refer to our Scoring System & Evaluation Guide.

Each rating given is scored out of a maximum of five points. The larger the Standard Deviation number, the wider the range of scores for that task.

Task	Average	Standard Deviation
Online data entry	1.6	2.1
Publish a record to the web	3.7	1.1
Set user permissions and groups	3.4	0.8
View audit trails or change log	2.0	1.0
Import data	3.3	0.8
Export data	3.4	0.8
Create a local terminology list	3.3	0.8
Upload or attach images and files	3.8	1.0
Catalogue an object	3.7	0.8
Batch modify a set of records	3.8	0.6
Multilingual capabilities	0.8	1.0
Customize a catalogue entry page	2.8	1.4
Create a template record	3.2	0.9
Generate and/or build a report	3.6	0.9
Perform basic search	3.8	0.8
Perform advanced search	3.7	0.7
Browse records	4.0	0.9
Create an exhibit	3.7	0.8
Enter condition report information	3.5	0.7

Evaluator comments

The following comments have been provided by our evaluators after they rated the performance of each task. These are selected comments drawn from the “Additional Comments” section of the evaluation form.

- Handles hierarchical authorities – Nomenclature included.

- Basic and functional system would be suitable for a small museum. Older-looking interface.
- Lack of audit and no online entry brought scores down.
- Overall, this product provides a good option for smaller institutions looking for a “one stop shop” kind of system. The fact that it can handle many different types of collections, records, and data is certainly a plus for places on a limited budget, or with limited expertise. This approach may be less ideal for larger intuitions, or for staffs managing a larger collection because it provides a way to do a lot of things adequately, but not necessarily robustly.
- Generally, the tasks that the system can handle seem to be scattered about in many different places. That can provide a lot of flexibility, but also potentially lead to confusion and frustration when attempting to use the product in a robust manner. Since it is intended for smaller organizations, the user interface could be much more user intuitive. It seems to require a lot of jumping around to accomplish all of the tasks a user can concerning one object.
- Very affordable product for museums on a limited budget;
- Platform has not been updated compared to other systems;
- Must always press ‘edit’ in order to update record as opposed to simply relying on user permissions which automatically allows or disallows a user edit functions; (old school);
- F1 – PastPerfect embedded help files for each field – client can change help notes.
- A sturdy out of the box option for standard, small collections. Has the advantage of being software that you purchase and own rather than paying a subscription fee making it attainable for small collections.
- Easy to use CMS especially for beginners but not sure how it handles large (50 thousand plus) collections? Would like to have seen more of the library and archival modules.

- The “Catalogue List” function allows users to create and name custom lists of artifacts. All of the lists can be organized in a series of folders for clarity and easy navigation. This feature has a lot of potential applications – one can imagine it being used to create a record set for staff to work on, to compile research for an exhibition, or to create a list to disseminate to a researcher.
- This product had very nice options. I particularly like the design; I found that the product offers easy access to many tasks from the main page. I did not find the main page cumbersome. When clicking further into the software, it did not appear to be a labyrinth of information.
- The “Disciplines supported” structure dictates the functionality of the database. This structure might not provide the flexibility to meet the requirements of all institutions.
- The software seem fairly intuitive to use, and very concise and comprehensive. The promised Support Office is reassuring for running into problems, and the F1 button provides definitions for the purposes of the various Fields. It also includes records for Contacts, Campaigns, and Pledges & Receipts.
- The program seems very clear to use with multiple functions/options for performing many tasks. I found it to be visually uncluttered which increases ease of use. The future cloud version they are working on seems very promising for many current day working conditions, including remote use.
- Presenter emphasized that program is designed for small to medium sized museums, with lower budgets available for technical support and online publishing. The largest drawback for

use by a small to medium sized museum within a Canadian setting is its lack of multilingual functionality.

- Specifically designed as a set display – not intended to be customized.
- It seems like this database was created in the ‘90s and never changed since (to become more user-friendly or to have a more intuitive interface with the new technology that is now available.)

Proficio by Re: discovery Software, Inc. - Profile

Note

This profile was completed by the software vendor at CHIN's request and does not reflect the views or opinions of CHIN. It is presented for information only and does not indicate approval or accreditation by CHIN. Inclusion of specific products does not mean that CHIN recommends the software, but that members of the community expressed interest in learning about these products.

This information was accurate as of January 2018. For more information or to request updated information, please contact the vendor directly.

Product names

Proficio
Proficio Elements
Proficio for the Web

Vendor name

Re:discovery Software, Inc.

Vendor Overview

Website URL

www.rediscoverysoftware.com

Head office

Charlottesville, Virginia, USA
Year founded: 1988
Telephone number: 434.975.3256
Fax number: 434.975.3935
Email: sales@rediscov.com
Contact person: Steve Richardson

Canadian/North American office

Re:discovery Software, Inc. also maintains a Western Regional Office in Boise, ID.

Product overview

Product description

Proficio is a comprehensive collections management database application for museums, archives and manuscript repositories, reference libraries, and archaeological sites. Proficio allows institutions to fully document current and historical information about individual items in their collections. Proficio supports workflows for collections management activities, including accessions, deaccessions, exhibitions, outgoing and incoming loans, and conservation. Among Proficio's strengths are its scalability, an intuitive user interface, Google-like searching capability, customizable user views, full imaging and multimedia support, batch updating functions, and robust reporting capabilities.

Proficio Elementsis a light version of Proficio, featuring the same user interface and many of the same features as the standard Proficio version.

Locally installed or Cloud-based implementation options are available for both Proficio and Proficio Elements.

Proficio for the Web is an optional add-on product for both Proficio and Proficio Elements that provides read-only access to selected catalog records and related image/media files.

Disciplines supported

Proficio's Collections Module is best suited for history, art and natural history collections. It can also be used for cataloging accessories to the collection such as vitrines or mannequins used in exhibitions or for props used in educational programs. The Archaeology Module is tailored specifically for archaeological sites/collections. The Archives & Library Module is tailored specifically archives & reference library collections management. One, two or all three of Proficio's Core Modules can be implemented in a single Proficio implementation. Proficio Elements includes both the Collections and Archives & Library Modules.

Product launch date

Proficio 8.0, a major overhaul of the previous FoxPro-based Visual Re:discovery version, was initially released in March 2006. Proficio version 8.20, released in May of 2017, is the current production version.

Product history

"Re:discovery" began as a solution to manage archaeological collections for the Thomas Jefferson Foundation, evolving into an application that supports a wide range of collection disciplines (history, art, natural history, archaeology, archives and library) in a single system. Originally the software was

written in FoxPro and implemented as a FoxPro database application. Beginning In 2005, a major overhaul of the application was undertaken; the software was rewritten in C# and implemented in the Microsoft .NET framework with Microsoft's SQL Server database engine, resulting in the launch of Proficio in 2006.

Future development

The next major commercial update/version release (version 8.22) is anticipated for late 2018/early 2019. Incremental patches with small feature enhancements/additions will continue in 2017 and 2018. Future releases will include an integrated dashboard, reminder function, and a workflow module.

Demo version

A Cloud-based trial version of Proficio or Proficio Elements is available.

To schedule a personalized demonstration of Proficio or Proficio Elements, please contact Re:discovery Software's sales team at 434.975.3256 ext. 3 or sales@rediscov.com.

Support

Support methods

Clients may contact Re:discovery's Help Desk by phone, email, or fax. A comprehensive user manual is integrated into the software and a PDF version of the manual is also available. Instructional white papers are available on our website in a password protected area available to clients with a current maintenance plan. Future support tools include a searchable on-line knowledge base (in development now) also available to clients with a current maintenance plan.

Support language(s)

English

Support availability and hours

Monday-Friday, 9 a.m. to 5 p.m. Eastern Time.

Support fees

Support is provided for no cost for an initial 90 day period. Beyond the 90 day period, an on-going software maintenance and technical support plan is available on a quarterly, semi-annual, or annual renewal basis. The cost of plan varies depending on the user license and custom configuration services provided.

Client support network

A Re:discovery Client Group is established as a Google Group.

Training

Introductory training via webinar is included with purchase of the software license. On an on-going basis, introductory training and topic-specific training webinars are provided monthly for no cost to clients on a current maintenance plan. On-site client training is available as an optional purchase.

System updates and maintenance

System updates and maintenance are included with the standard software maintenance plan for Proficio and Proficio Elements. These include both patch updates to an existing version as well as new version releases. Patches are available regularly through the year. Major version releases occur about every 18 months.

Cost

Pricing

Payment arrangements may be offered on a case by case basis. There are no annual licensing fees. Proficio may be licensed to support any number of concurrent user logins (the number of named users is unlimited), and the one-time license fee corresponds directly to the number of concurrent users. Proficio Elements may be licensed to support up to five (5) concurrent users.

Maintenance costs

For commercial customers, the monthly maintenance costs for Proficio are determined by multiplying the cost of the software license by 1.75%. For Proficio Elements, maintenance costs are fixed according to the number of concurrent users.

Additional fees

Costs for data migration, custom configuration and Cloud hosting vary from client to client, if required and/or desired. Fixed price quotes are provided.

System specifications

Operating systems supported

Proficio is a Windows application. For locally installed network implementations, Windows Server 2008 R2 or later is supported. For desktop computers running Proficio on a network or as a standalone installation, Windows 7, 8, and 10 are supported.

Proficio and Proficio Elements may also be implemented in the Cloud, hosted by Re:discovery Software. Access to the Cloud implementation is via a web browser, so Windows is not required on the local client computer.

Underlying database

Proficio is built on Microsoft SQL Server. There are no additional fees for the supplied Microsoft SQL Server 2012 R2 Express Edition. Clients may also implement Proficio or Proficio Elements with their own installation of SQL Server (versions 2008 through 2016 are supported).

Platform(s)

Proficio Mobile provides access to data stored in a Proficio database using mobile devices such as tablets or smartphones. Proficio Mobile supports the following functions:

- Location and condition verify/update: Verify the location and condition of items and update these as necessary.
- Container location change: Update groups of records that are in the same container/location with a new container location.
- Inventory: Inventory your collections and update locations if necessary.
- Modify a record: Modify selected fields for records in a directory. You can select the fields that are available in the Mobile configuration options in the main Proficio system.
- Add a new record: Add a new record to the selected directory. You can select the fields that are available in the Mobile configuration options in the main Proficio system.
- Docent/researcher view: Allows read-only access to selected fields. A researcher or docent can look up information on an object from their mobile device.

Hardware requirements

	Minimum	Recommended
	Operating system	
Workstation	Windows 7 or above*	Windows 7 or above*
Server	Windows 2008 R2 Server or above*	Windows 2008 R2 Server or above*
	Hardware	
Workstation	CPU: Pentium IV, 1 GHz or better RAM: 1 GB**	CPU: Intel Quad Core, 3.0 GHz or better RAM: 6 GB** or more

	Monitor: 17 inch super VGA Video: 1024 x 768 x 32 bit	Monitor: 20" widescreen Video: 1024 x 768 x 32 bit
Server	CPU: Pentium IV or compatible RAM: 4 GB	CPU: Intel Quad Core, 4.0 GHz or better RAM: 12 GB or more
	Disk storage	
Workstation	500 MB available (use server specs if a stand-alone installation)	1 GB available (use server specs if a stand-alone installation)
Server	10 GB available (plus 25-100 KB per record, figure does not include storage of attached images and multimedia files)	15 GB available (plus 25-100 KB per record, figure does not include storage of attached images and multimedia files)
	Software	
.Net Framework	Microsoft .NET Framework 4.0 (included on installation DVD) or 4.5***	Microsoft .NET Framework 4.0 (included on installation DVD) or 4.5***
Web Browser	Internet Explorer 7 or above (required for SQL Server 2012 installation)	Internet Explorer 7 or above (required for SQL Server 2012 installation)
SQL Server	SQL Server 2012 Express Edition (included in the installation package). For large network installations, we recommend SQL Server Standard Edition or above****.	SQL Server 2012 Standard Edition or above**** (Purchased separately by client. Recommended for large network installations.)
Windows PowerShell	Windows PowerShell 2.0	Windows PowerShell 2.0
	Network (for multi-user installations)	
LAN	Speed: 10 Mbps File Sharing: Standard Windows file sharing (SMB)	Speed: 100 Mbps or better File Sharing: Standard Windows file sharing (SMB)
WAN	Low-bandwidth environments (<10 Mbps) require the use of a remote application delivery system such as Remote Desktop Connection, Microsoft Terminal Server, or Citrix MetaFrame.	Low-bandwidth environments (<10 Mbps) require the use of a remote application delivery system such as Remote Desktop Connection, Microsoft Terminal Server, or Citrix MetaFrame.

* Proficio is compatible with Windows 7, 8, 8.1, 10, Windows Server 2008 R2, 2012, 2012 R2, and 2016.

**SQL Server Express 2012 supports 1 physical processor, 1 GB of memory, and 10 GB of storage per database. Such limits do not exist for SQL Server Standard Edition or above.

***Microsoft .Net Framework 3.5 is also required for SQL Server 2008, 2012, and 2014. .Net Framework 4.6.1 is required for SQL Server 2016. These are installed during the SQL install process. If installing on a Windows Server 2008 R2, install .Net 3.5 SP1 prior to your SQL installation.

****Proficio is compatible with SQL Server 2005, 2008, 2008 R2, 2012, 2014, and 2016.

Proficio for the Web or Public Search

- Intel Quad Core, 3.0 GHz with 6 GB of memory or better is recommended.
- .NET Framework 4.0 or 4.5
- Microsoft Internet Information Services (IIS), version dependent on operating system

Note: If using Proficio on a stand-alone computer (not as a workstation on a server installation), the following Windows operating systems are compatible with Public Search†:

Any workstation running Proficio for the Web or Public Search

- Windows 7
- Windows 8, 8.1
- Windows 10

If using Proficio on a workstation accessing a server installation, the server portion of Proficio **must be** installed on a computer running one of the following Windows Server operating systems:

- Windows 2008 Server
- Windows 2008 R2 Server
- Windows 2012 Server
- Windows 2012 R2 Server
- Windows 2016 Server

† The Browse by Images feature within Public Search cannot be used on a stand-alone desktop computer due to the limited number of internet connections allowed by the operating system. Browse by Images feature within Public Search can only be used from a workstation that points to Proficio that is installed on a true server operating system such as Windows 2008, 2008 R2, 2012, 2012 R2, 2016 Server.

Staff requirements

Proficio can be managed by existing museum employees and does not require a high level of technical expertise. We recommend designating a Proficio administrator for managing individual user

permissions and other routine administrative tasks, but a dedicated staff member is not required to maintain it.

Plug-ins and/or modules available

- Nomenclature 4 (developed by third party, no additional cost)
- Art and Architecture Thesaurus (developed by third party, no additional cost)
- Integrated Taxonomic Information System (developed by third party, no additional cost)
- Proficio Mobile (developed by Re:discovery Software, no additional cost)

Third-party requirements

For a locally installed implementation, Microsoft .Net framework (version 4) and Internet Explorer (version 7 or higher) are required. Adobe Reader and/or Microsoft Word are required for reading the supporting documentation for the product, such as white papers and manuals. These are also needed to read reports saved by users as an external file from the application.

Interoperability

Proficio is compatible with Optical Character Recognition (OCR) software, Microsoft Office products, and website development tools that use the Windows Communication Foundation (WCF) framework to query SQL databases.

Accessibility

Proficio for the Web (the public-facing, read-only interface) meets WCAG guidelines.

Customization

A variety of customization options are available with Proficio. Proficio users with appropriate permissions can rename most fields and related field properties (with some exceptions), define new fields on the Extended Information tab, and customize reports. In addition, users are able to select preferred fields to include in Proficio's List View, with the option to change the fields at any time without impacting other Proficio users.

Customization that includes changing the layout of fields requires Re:discovery staff. A defined set of services for configuration changes is provided for a fixed price. Additional configuration changes and/or custom programming are available on a fixed price quote basis.

Some customization options are only available in Proficio and not Proficio Elements.

Web integration capabilities

Cloud functionality

Re:discovery Software offers a hosted Cloud implementation option for both Proficio and Proficio Elements, allowing users to run the application entirely through a web browser and maintain their database in the Cloud.

Server location
: USA

Security protocols
: Authentication and authorization takes place at two levels: first at a secure Web Portal, using standard Windows authentication, then at the application (Proficio/Proficio Elements) level.

Typical/average uptime
: 99.5%

Back-end maintenance procedures and downtime
: Clients are informed in advance of any software updates and or maintenance tasks, which are performed in off-hours when necessary.

Browsers supported

- Chrome
- Internet Explorer
- Safari
- Firefox

Web-based access for data entry

Yes, with the Cloud option, staff/volunteers can enter data through a web browser interface without having Proficio installed on their device. There are no restrictions on functionality for this type of access.

Web publishing platform

Proficio for the Web supports publishing data, images and multimedia files from the Catalog Records in Proficio and Proficio Elements. The intention is to provide read-only access to selected information from the Proficio database. Proficio for the Web supports the creation and display of Virtual Exhibits, as well as robust searching and browsing capability. An API is included with the Proficio for the Web license (not open source) that clients can use to create custom designed websites.

Linked open data functionality

Proficio supports linked data URIs for authority references.

User groups and security

User profiles

Proficio's User Security interface allows profiles/permissions to be established for each user. Multiple users can be logged in simultaneously, as defined by the user license for Proficio, and multiple users can be editing records at the same time.

User groups

Proficio supports the individually defined security/access restrictions. Several user types are available: Administrator, Data Entry, Research and Custom. Each of these user types include specific functional rights by default, which can be adjusted as needed by the Proficio administrator.

Visitor profiles

A Proficio user can be defined as a read-only user.

Installations

Within a single network, Proficio and Proficio Elements can be installed on as many workstations as desired. The number of users that can login to the application is determined by the user license. Proficio can be licensed for any number of concurrent users, while Proficio Elements is limited to a maximum of 5 concurrent users.

Audit trails and/or edit history

Proficio's Audit Trail provides three levels of tracking changes to a record, with the most robust level providing before and after tracking of changes to individual fields. A history of changes to catalog records is maintained with the catalog record. History tracking is also available for over 20 categories of information, including location history, exhibit history, loan history and appraisal history.

Offline access

Locally installed implementations of Proficio and Proficio Elements do not require an Internet connection. Proficio's Cloud option requires an Internet connection.

Privacy features

Logging into Proficio and Proficio Elements requires a user name and password.

Data migration and stability

Import formats

Supported import formats include tab delimited text, .csv, XML, and MARC. Both Proficio and Proficio Elements include an interface that clients can use to import data on their own. In certain circumstances, RSI staff provides data migration services for a fixed price, based on a review of a client's legacy data.

Export formats

Supported export formats include tab delimited text, .csv, XML, and MARC.

Backups

Proficio includes an integrated backup system with options for creating a Complete System Backup or backups of Selected Directories. Multiple catalogs may be backed up in a single process. Backups may be scheduled to run at defined times or run manually. Clients may select where backups are stored on their local system or network.

Standards and schemas

Metadata schemas

Proficio supports the export (as well as import) of MARC records in the native MARC format. Proficio provides a variety of options to export specific fields to a variety of file formats, including XML. Since the fields exported are selected by the user (when they create the export template), there is no one specific schema available.

Data content standards (cataloguing rules)

- Spectrum 4.0
- MARC

Vocabulary standards

- Nomenclature 4.0 for Museum Cataloging
- Art and Architecture Thesaurus (AAT)
- Integrated Taxonomic Information System (ITIS)

All of the above are integrated into Proficio for no additional cost.

Local terminology lists

Clients can import terminology lists of unrelated terms (into Proficio's Authority Tables). Users can manually enter their own terms into the Lexicon and create relationships between terms in a hierarchy. Multi-lingual terms are supported.

Accreditation

Proficio is Spectrum 4.0 compliant.

Data entry and content

Media upload/linking

Media can be uploaded into Proficio, as well as linked to from an external source. There are multiple methods available. There is an Import Image and Import Multimedia function in the application where the user can browse to and select one or multiple images or media files to associate with records. The user can drag and drop images from Windows Explorer to the image box for an individual record. There is also a Batch Image Import and Batch Multimedia Import where the user can create an Excel spreadsheet of catalog numbers and file paths to images or media files and load that into the application to associate multiple images or media files to multiple records within a table at the same time. A user can also use a field in a record to document a URL to an image or media file on the network and use the application's "Launch to Windows" function to view the image/media file using the registered program for the specific file type.

Media formats supported

Proficio supports any type of media format that can be launched on a user's computer.

Data entry features

Copy and paste
: Yes

Search and replace
: Yes, supported both within a record and between records.

Spellcheck
: Yes. Proficio's dictionary includes English, French, German, Italian, and Spanish words. Words can be added to the dictionary.

Bulk cataloguing
: Yes

Batch edit
: Yes

Batch location change
: Yes

Duplicate record search
: Yes

Template record
: Yes, standard record templates are provided.

Date selection and formats
: Proficio includes both true date (MM/DD/YYYY) and flexible date fields. Flexible data fields support the use of circa dates, incomplete dates and date ranges.

Mandatory fields
: The Proficio administrator (or other user with appropriate permissions) can define which fields are mandatory.

Others
: Users can copy an entire record and change only the fields necessary to catalog similar objects, as well as paste the contents of a field from the previous record.

Spreadsheet editing view

Proficio's Quick Entry interface provides a spreadsheet-like view for easy viewing or editing of records.

Geographic mapping

A prototype of a Geographic Mapping feature has been developed and will be available in a future release of Proficio using the polygon format.

Multilingual fields

Proficio is currently only available in English. Unicode is supported, but non-Latin characters are not. Multiple languages may be entered into a field, but there are not duplicate fields for multiple languages.

Barcoding

Proficio supports the use of barcode scanning devices, and includes standard reports for generating barcode labels. No specific plug-ins or brand of additional equipment is required.

Labelling

Proficio supports generating printable labels (including barcode labels) from database records.

Search and reporting

Types of search supported

Proficio provides robust searching and filtering capabilities. Word Search is the fastest, most powerful search option in the program, providing a Google-like search to find any word, anywhere in the database. Users can search for a single word or phrase, limit the search to one or more designated fields, limit the search to a user defined subset of records, or search all fields. Boolean, wildcard and proximity searching is supported, as are searches across alphabetic ranges or a range of years. Users can search hierarchical lexicons to search for related, broader, narrower or proper terms. Searches can include more than one directory or type of record (catalog records, exhibit records, loan records, artist records, etc.) at a time.

Boolean queries
Yes
Query any field
Yes
Sort query results
Yes
Saving search results
Yes
Filter search results
Yes
SQL-based search
No
Export search results
Yes
Free-text (Google) searches
Yes
Search result views
Yes

Multilingual searching

Multi-lingual searching works with the exception of non-Latin alphabets suck as Greek or Russian. Diacritics, such as a grave (`) or tilde (~) are ignored for searching purposes.

Report styles included

Over 125 reports are included with the software, including a variety of forms and reports that support the range of collections management processes, including forms and reports for catalog records, accessions, deaccessions, conservation, loans, and exhibits.

Report customization

Users may customized reports using either of Proficio's report writing tools, Quick Report and Proficio Reports.

Report program

Quick Report and Proficio Reports were developed by Re:discovery Software using Microsoft's DevExpress development tools.

Museum functions

Collections management function overview

Proficio is a complete collections management system, supporting workflows for standard museum functions including accessions, deaccessions, outgoing and incoming loans, conservation, exhibits, as well as tracking information about artist/makers and constituents.

Registration

Proficio users can create a separate Registration directory for documenting incoming collection items. These items can be transferred to a permanent collections directory once the decision is made to accession the items.

Acquisitions

The Accessions submodule is a standard component for documenting proposed and approved acquisitions and automatically links individual catalog records to the related Accession record.

Inventory management

Proficio includes fields for managing inventories and tracking inventory history. Proficio Mobile includes an inventory function for use on a tablet or other mobile device that updates the Proficio database during collection inventories.

Internal tracking

Changes to catalog records are tracked in Proficio.

External shipments

Proficio includes a Shipping submodule for tracking external shipments. Catalog records can be attached and viewed from the Shipping submodule.

Cataloguing

Proficio provides an extensive array of industry-standard fields for cataloging individual items that are tailored to various collection types, including history, art, natural history, archaeology, archives and library.

Conservation

Proficio includes a Conservation submodule as a standard component for documenting conservation activities. Users can link an individual catalog record to one or more Conservation Records to records in the Conservation submodule, and Proficio maintains a record of conservation treatments completed or proposed.

Curatorial research

Yes. Proficio includes powerful tools for searching and filtering database records. Curators may group records of interest as tag sets and run reports on those specific sets of records.

Publications and printed material

Yes. Proficio users may record information about publications or other documentation related to individual items in the collection.

Rights management and reproduction

Proficio includes a Restrictions submodule for managing the use of individual items or groups of items in the collection.

Risk management and valuation

Proficio tracks appraisal and insurance history for items in the collection.

Exhibitions

Proficio includes an Exhibits submodule as a standard component for documenting exhibitions. Users can link one or more catalog records to an Exhibit Record and maintain a record of exhibits in which an object has appeared.

Loan management

Proficio includes both Incoming and Outgoing Loan submodules for documenting loans. Users can link one or more catalog records to a Loan Record and maintain a record of past loans.

Deaccessions

Proficio includes a Deaccessions submodule as a standard component for managing proposed and approved deaccessions. Users can link one or more catalog records to a Deaccession Record.

Digital asset management

Proficio supports the acquisition, storage, viewing and printing of digital assets.

Additional features and functions

Proficio supports the cataloging of archival material in a hierarchical manner allowing the user to break down an archival collection into smaller components (sub-collection, series, sub-series, file unit, and item). Proficio supports the cataloging of archeology collections in a hierarchical manner allowing the user to track the archeological process and physical site in addition to the artifacts.

Proficio by Re:Discovery Software, Inc. - Evaluation

About this evaluation

This evaluation was performed on January 23, 2018 with a representative from Re:Discovery Software, Inc. It was evaluated by eight members of the museum community and reflects their personal opinion. These evaluations were based on a set list of tasks in a limited period of time. It is always recommended that you request a demonstration of any product in which you may be interested based on your specific requirements.

Evaluator ratings

The following table shows the ratings given to this software by members of the museum community. To understand what these ratings mean, please refer to our Scoring System & Evaluation Guide.

Each rating given is scored out of a maximum of five points. The larger the Standard Deviation number, the wider the range of scores for that task.

Task	Average	Standard Deviation
Online data entry	3.3	1.4
Publish a record to the web	3.4	0.7
Set user permissions and groups	4.1	0.6
View audit trails or change log	4.4	0.7

Import data	3.8	0.7
Export data	3.8	0.7
Create a local terminology list	3.3	1.2
Upload or attach images and files	3.8	0.9
Catalogue an object	3.9	0.6
Batch modify a set of records	4.1	0.4
Multilingual capabilities	1.8	1.0
Customize a catalogue entry page	3.3	0.7
Create a template record	3.0	1.4
Generate and/or build a report	3.8	0.7
Perform basic search	3.9	0.8
Perform advanced search	3.5	1.6
Browse records	3.4	1.5
Create an exhibit	2.6	1.8
Enter condition report information	2.9	1.4

Evaluator comments

The following comments have been provided by our evaluators after they rated the performance of each task. These are selected comments drawn from the “Additional Comments” section of the evaluation form.

- The ability to attach additional files to records (Word documents, PDFs, etc.) would be something that would be beneficial. I could see attaching research reports, obituaries, family histories and handwritten notes from donors to records really enriching the provenance of an object.
- **Vendor comment**: Proficio includes the ability to attach an unlimited number of digital files to a record from the Multimedia Tab. This is a standard feature in the software. Further, text-based attachments are discoverable via Proficio’s Word Search.
- Nice user interface, highly functional system. The only area where I saw big need for improvement was the multilingual aspect – requires system field labels AND separate fields.
- Good, traditional, museum/archive CMS system, with the traditional, expected capabilities. Its search functions are its strongest feature. Not a very intuitive user interface unless you are very comfortable in a Windows operating system.
- **Vendor comment**: As a Windows application, Re:discovery Software developed Proficio’s user interface to include familiar components found in other Windows applications, such as a Navigation Pane, drop-down menus, Toolbar and sizable windows.

- Only accessible on Apple hardware if using the Cloud version. Might be a steep learning curve for people who are not experienced in traditional museum collections management practices.
- **Vendor comment**: Proficio may be installed/used on Apple hardware (and we have clients that have done this), provided that the Apple computer supports running Windows separately from the Mac OS. Proficio users quickly get comfortable using the software. We provide introductory training and offer monthly training webinars on an on-going basis. Our experienced support team is ready to assist as needed.
- I found Proficio's menu to be rather clunky and overwhelming. I appreciated that Proficio allows an institution to create as many collections databases as desired. This is an essential feature for museums/organizations covering multiple disciplines.
- **Vendor comment**: Other evaluators did not come to the same conclusion. See comment above ("nice user interface, highly functional system").
- The small record set (I believe we were told 72 records) made sense given the requirements for the demo and need to keep things moving. Nevertheless, I was left wondering how the functions would perform in a real world environment.
- **Vendor comment**: Proficio is powered by Microsoft's SQL Server and performs extremely well in real world environments, handling large museum collection catalogs with hundreds of thousands of records without performance issues.

S-MUSEUM by SKINsoft - Profile

Note

This profile was completed by the software vendor at CHIN's request and does not reflect the views or opinions of CHIN. It is presented for information only and does not indicate approval or accreditation by CHIN. Inclusion of specific products does not mean that CHIN recommends the software, but that members of the community expressed interest in learning about these products.

This information was accurate as of January 2018. For more information or to request updated information, please contact the vendor directly.

Product name

S-MUSEUM

Vendor name

SKINsoft

Vendor overview

Website URL

www.skinsoft.fr (French version)
www.skinsoft.org (English version)

Head office

5, rue du Château Rose 25000 Besançon, France
Year founded: 2008
Telephone number: +33 (0)9 52 42 30 38
Email: geoffroy.rigoulot@skin-soft.org
Contact person: Geoffroy Rigoulot (senior manager)

Product overview

Product description

SKINsoft is a twenty-first century web-based IT research lab. The core of its business is collections management and publication in various cultural environments. Thanks to its desire to promote heritage using contemporary tools, SKINsoft extends its know-how to various sectors such as museums, libraries, archives, archeology and even cinema.

Our solutions are now technologically unique in the business world: they are the fruit of scientific research, developed in concert with business and cultural heritage management professionals.

S-MUSEUM is the initial product developed by SKINsoft. This latest generation web software makes it possible to manage any type of heritage collection more closely, and publish them on any platform (web portals, mobile applications, virtual 3D museums, etc.).

Very mobile and user-friendly by nature, the application offers highly advanced features for managing every aspect of a collection in a user-friendly, intuitive interface: inventory, documentation, conservation, proofing, management, etc. Entirely modular, the application is adaptable to all needs.

S-MUSEUM is part of an application suite developed by SKINsoft, which includes complementary modules that can be combined freely, based on the needs expressed.

Core applications:

- S-MUSEUM: web-based application developed specifically for contemporary cultural museums, foundations, and institutions.
- S-COLLECTION: web-based application dedicated specifically to managing corporate and private heritage collections.
- S-CINEMA: web-based application for managing audiovisual collections.
- S-ARCHEO: web-based application dedicated to the management and tracking of preventive and programmed archeology operations.
- S-FOUNDATION: web-based collections management application adapted to the needs of cultural foundations and institutes.
- myEXPO: independent web-based application for managing exhibitions and related projects.

Complementary modules:

- SKINweb: publication of collections on a web interface (public or private).
- SKINlibris: library collections management.
- SKINarchive: definitive archives management.
- SKINheritage: heritage management and movable/immovable asset management.
- SKINdam: digital resource management.
- SKINmedia: photo, video, and media library management.
- SKINreporter: standalone mobile application, synced with one of the primary applications. It is dedicated to proofing, managing movements, and creating condition reports.

Disciplines supported

S-MUSEUM is a multi-task application. It enables the management of all types of collections and therefore meets the needs of a wide range of cultural institutions: museums (art, history, natural sciences, etc.), film libraries, archive centres, or libraries.

Product launch date

2010. The latest version of the application is from 2017.

Product history

Since its launch, S-MUSEUM quickly won over several institutions, such as:

- Musée Rodin (Paris, France)
- Musée des arts décoratifs (Paris, France)
- Muséum National d'Histoire Naturelle (Paris, France)
- The 25 museums of the Ministère des Armées (Paris, France)
- The museums of the New York State Historical Association (Cooperstown, New York, US)
- Cinémathèque suisse (Lausanne, Switzerland)

Future development

The S-MUSEUM application is the result of continually listening to professionals' expectations. Progressive by nature, it regularly integrates functional updates to benefit each user, in order to keep pace with the needs of each. The next major version of the application is set to be launched in 2018.

Demo version

Demonstration sessions can be organized at the convenience of interested institutions.

Support

Support methods

SKINsoft offers its clients various forms of assistance: email, telephone (hotline), Skype, online support platform and live assistance with the SKINsoft business teams, or in-person interview. There are designated advisors on the SKINsoft team for each project, for a quality partnership from beginning to end.

Support language(s)

SKINsoft services are offered in English and French. The application is available in various languages.

Support availability and hours

SKINsoft can adapt to any client's time zone, thus remaining accessible during local business hours.

Support fees

The support fees are included in the annual fees set out in the maintenance agreement. Any contract extension is possible, with specific services.

Client support network

SKINsoft maintains a close relationship with each of its clients, remaining at their disposal.

Training

There are training sessions with every installation. Additional sessions can also be planned as needed, online or on site.

System updates and maintenance

The S-MUSEUM application includes preventive, corrective and evolutionary maintenance. Feature and performance updates are offered every 9 to 12 months and done via remote maintenance.

Cost

Pricing

The price is based on several variables: the size of the institution concerned and its collections, the number of expected users, the number of sites expected to use the application, and different complementary modules, etc.

Maintenance costs

The annual maintenance cost is proportional to the license cost. SKINsoft hosts some of its clients who have an annual membership.

Additional fees

Based on the nature of the institution's needs, SKINsoft offers a comprehensive user assistance service with the maintenance agreement. Any contract extension is possible, with specific services.

System specifications

Operating systems supported

All client workstation operating systems are covered by the S-MUSEUM application (Windows, Mac OS, Linux). Because it uses a web browser, it can adapt to all environments without affecting performance.

Underlying database

The application depends on contemporary technologies.

Platform(s)

S-MUSEUM is a responsive application, compatible with both desktop computers and mobile devices, such as tablets.

Hardware requirements

For optimal use of the S-MUSEUM application, an application host server with enough RAM is required, and clients' workstations must be connected to the Internet and have a browser.

Staff requirements

The client does not need to have qualified IT staff on site; the SKINsoft teams can intervene remotely, with the necessary access.

Plug-ins and/or modules available

S-MUSEUM is part of an application suite consisting of modules that can be combined freely, making it possible to better meet the client's needs. All of these modules were developed on the same application base by SKINsoft. They are interoperable.

Third-party requirements

No third-party products are needed to use the application.

Interoperability

S-MUSEUM and the complementary modules of the SKINsoft suite are natively interoperable and can therefore be interfaced with other third-party tools via web services, and thus be integrated into the client's existing IT architecture.

Accessibility

S-MUSEUM natively benefits from the accessibility features of web browsers: management of contrast and character size, adaptation of the screen interface, etc. Special attention is given to the simplicity, legibility, and ergonomy of the different interfaces.

Customization

The S-MUSEUM application offers various customization options for users with regard to the interface, the information displayed, or the fields entered.

Web integration capabilities

Cloud functionality

The S-MUSEUM solution is completely web-based and can be used on any workstation that has a web browser and is connected to the Internet.

Installed on a virtual machine, the application does not need to be deployed on client computers. Users can access all of the application's features from a workstation equipped with a browser, using a wired or mobile connection (4G key, Wi-Fi).

Server location
: The server can be located within the client institution or at a local specialist's office.

Security protocols
: SKINsoft strives to ensure optimal security. The technical team performs incremental back-ups on various servers and provides clients with the data to perform an internal back-up should they wish to do so.
: The application is protected through various mechanisms, such as the implementation of user accounts (encrypted and limited access, different accounts and passwords, etc.), HTTP filtering rules or the implementation of logs to save the different activities on the server (user connection, etc.).

Typical or average uptime
: The application is available 24/7 (outside maintenance operations).

Back-end maintenance procedures and downtime
: Performed in the background and/or outside local business hours.

Browsers supported

All recent web browsers are compatible with S-MUSEUM. Applications all perform to the same level whether used on Google Chrome, Mozilla Firefox or Safari.

Web-based access for data entry

Because the application is web-based, any user with a user name and password can connect from a browser and access all or part of the features, based on their user profile. The S-MUSEUM admin area makes it possible to manage user profiles and carefully configure their access rights to the features and fields.

Web publishing platform

The SKINweb module makes it possible to carefully select the data to be posted online and manage the entire editorial portion of the site.

Several forms of web publication may be considered: collections web portal, virtual exhibits, real-time 3D virtual tour, etc. SKINsoft considers each project and offers custom solutions to fit every need.

Linked open data functionality

The application supports linked data, as well as the uniform resource identifiers (URI), particularly in the harvesting of data from national and international data reservoirs (e.g. VIAF, Getty, ULAN, etc.).

User groups and security

User profiles

S-MUSEUM enables administrators to create as many user profiles as necessary. These profiles are very carefully configured, with access rights that can be very precisely limited. Each profile is also protected by an identifier and password specific to the user. Moreover, it is also possible for several users to work at the same time and on the same project.

User groups

The application access rights can be configured by one or more administrators and applied either individually (per user profile) or collectively (per group).

Visitor profiles

User/visitor groups can be configured to have read-only rights.

Installations

Being web-based, S-MUSEUM can be accessed from any computer connected to the Internet. The simultaneous use of the application by several users does not have any impact on performance.

Audit trails and/or edit history

S-MUSEUM offers access to a dashboard that lists all changes made by users.

Offline access

The SKINsoft application suite also includes SKINreporter, a tablet-based module, making it possible to work offline and remotely.

Privacy features

S-MUSEUM integrates very thorough rights management, allowing admins to make certain fields and features inaccessible, and limit access to an authorized public.

Data migration and stability

Import formats

The SKINsoft team can support various import formats and migrate data from past or modern collections management systems. Moreover, all users have access to a data import tool in the application.

Export formats

The application enables the export of documents in Excel, PDF, CSV, JSON, XML and MARC formats; it can also export data in specific formats for integration into third-party tools.

Backups

SKINsoft manages back-up procedures or provides the client institution with the means to manage them itself.

Standards and schemas

Metadata schemas

S-MUSEUM is a powerful application: it enables the configuration of all data schemas, regardless of the client institution's specifications, as well as the import/export of all format types.

Data content standards (cataloguing rules)

S-MUSEUM can be adapted to the specific standards used locally or specific environments, etc.

Vocabulary standards

Possibility of importing/syncing all types of vocabulary in the application (complex, multilingual, etc.)

Local terminology lists

S-MUSEUM can easily be adapted to the specific needs of each institution, which can therefore choose thesauri and vocabularies that are existing, controlled, national, local or specific to their context. The admin area of the thesauri provides all authorized users with the opportunity to enhance, amend (create, delete, correct, add a term description) and classify terms at as many levels as needed and with no limits to the number of new terms that can be added. Moreover, the application enables the management of relations between terms (synonyms, associated terms, parent terms).

Accreditation

Internationally, the S-MUSEUM application is Spectrum 5.0 compliant. It is also validated by the Service des Musées de France.

Data entry and content

Media upload/linking

The S-MUSEUM application natively integrates a comprehensive and transversal media management tool.

It enables the syncing of a remote DAM and the importation of media into the local DAM based on several loading methods.

Media formats supported

Unlimited.

Data entry features

The fields available in the S-MUSEUM application are very diverse and offer various entry methods based on the context.

Copy and paste

Yes
Find and replace
Yes
Spellcheck
Yes
Bulk cataloguing
Yes
Batch edit
Yes
Batch location change
Yes
Duplicate record search
Yes
Template record
Yes
Date selection and formats
Yes
Mandatory fields
Yes
Others
No response.

Spreadsheet editing view

Yes

Geographic mapping

Yes

Multilingual fields

Yes

Barcodes

Yes

Labelling

Yes

Search and reporting

Types of search supported

S-MUSEUM supports several types of queries. Users can perform full-text searches, which are similar to a Google search, advanced searches, which provide extremely accurate results thanks to various search criteria, or federated searches.

Boolean queries
Yes
Query any field
Yes
Sort query results
Yes
Saving search results
Yes
Filter search results
Yes
SQL-based search
Yes
Export search results
Yes
Free-text (Google) searches
Yes
Search result views
Yes

Multilingual searching

Yes

Report styles included

Yes. The default reports, such as search results or object lists, are presented in the form of an Excel or PDF export.

Report customization

Yes. Reports can be configured and updated.

Report program

Yes. The report creation tool is integrated into S-MUSEUM.

Museum functions

Collection management function overview

S-MUSEUM covers all museum needs, from collection documentation to management.

Registration

Supported by S-MUSEUM.

Acquisitions

Supported by S-MUSEUM.

Inventory management

Supported by S-MUSEUM.

Internal tracking

Supported by S-MUSEUM.

External shipments

Supported by S-MUSEUM.

Cataloguing

Supported by S-MUSEUM.

Conservation

Supported by S-MUSEUM.

Curatorial research

Supported by S-MUSEUM.

Publications and printed material

Supported by S-MUSEUM.

Rights management and reproduction

Supported by S-MUSEUM.

Exhibitions

Supported by S-MUSEUM.

Risk management and valuation

Supported by S-MUSEUM.

Loan management

Supported by S-MUSEUM.

Deaccessions

Supported by S-MUSEUM.

Digital asset management

Supported by S-MUSEUM.

Additional features and functions

No response.

S-MUSEUM by SKINsoft - Evaluation

About this evaluation

This evaluation was performed on February 21, 2018 with a representative from SKINsoft. It was evaluated by four members of the museum community and reflects their personal opinion. These evaluations were based on a set list of tasks in a limited period of time. It is always recommended that you request a demonstration of any product in which you may be interested based on your specific requirements.

Evaluator ratings

The following table shows the ratings given to this software by members of the museum community. To understand what these ratings mean, please refer to our Scoring System & Evaluation Guide.

Each rating given is scored out of a maximum of five points. The larger the Standard Deviation number, the wider the range of scores for that task.

Task	Average	Standard Deviation
Online data entry	4.5	0.6
Publish a record to the web	4.8	0.5
Set user permissions and groups	4.0	0.8
View audit trails or change log	4.5	0.6
Import data	2.8	2.2
Export data	4.5	1.0
Create a local terminology list	3.3	2.4
Upload or attach images and files	4.8	0.5
Catalogue an object	4.3	0.5
Batch modify a set of records	3.8	1.0
Multilingual capabilities	4.8	0.5
Customize a catalogue entry page	3.3	1.7
Create a template record	3.5	1.3
Generate and/or build a report	4.8	0.5
Perform basic search	4.3	1.0
Perform advanced search	4.5	0.6
Browse records	4.3	1.0
Create an exhibit	4.8	0.5
Enter condition report information	4.8	0.5

Evaluator comments

The following comments have been provided by our evaluators after they rated the performance of each task. These are selected comments drawn from the “Additional Comments” section of the evaluation form.

- All aspects of data recording and management are well integrated. Task management and notification features would facilitate the planning and documentation of exhibit related activities.
- This collections management tool is a great find. It seems to be very easy to use because the functions and tasks are very intuitive. The demonstration shows that users can easily and quickly learn to use this application. The application's interface is very pleasing to the eye. After often working in Quebec museum institution conservation/restoration departments, this application provides good technological possibilities when writing condition or restoration reports. I am convinced that conservators would very much like to work with this collections management application. This collections management application is one of my favourite among the demonstrations I've seen.
- A very powerful and interesting tool. My only caveat: not being able to change the database entries myself.

Vernon CMS by Vernon Systems - Profile

Note

This profile was completed by the software vendor at CHIN's request and does not reflect the views or opinions of CHIN. It is presented for information only and does not indicate approval or accreditation by CHIN. Inclusion of specific products does not mean that CHIN recommends the software, but that members of the community expressed interest in learning about these products.

This information was accurate as of January 2018. For more information or to request updated information, please contact the vendor directly.

Product name

Vernon CMS

Vendor name

Vernon Systems

Vendor overview

Website URL

http://vernonsystems.com/

Head office

Auckland, New Zealand
Year founded: 1985
Telephone number: +64 9 815 5599
Fax number: +64 9 815 5596
Email: sales@vernonsystems.com
Contact person: Charles Tongue

Product overview

Product description

Vernon Systems has more than 30 years'experience in creating software for the museum, gallery and cultural heritage sectors. Vernon CMS is a modular desktop collection management system that handles all types of collections. It manages all common collection processes, including acquisitions, loans, exhibitions, conservation, rights, public access, and deaccessions. Multi-user security and data auditing features make it particularly suited for organisations with a collection management team. Content in Vernon CMS can be shared through the Vernon Browser web module, programming interfaces, and data exports to eHive.

Disciplines supported

Over 60% of our users manage multiple collections within Vernon CMS. The majority of our users have social history and/or art collections, but we have excellent examples of Vernon CMS being used to manage all the collections mentioned. Specialist screens to support archive and library collections were added in 2014.

Product launch date

9 August 1988. Vernon CMS is being constantly developed. A major software upgrade is released annually, with intermittent updates as required. Details of recent updates can be found on our website.

Product history

Bil Vernon founded Vernon Systems in 1985 after developing a custom dealer gallery application. From this initial system he saw the need for a general museum and gallery cataloguing system. This was built to match the Spectrum international museum standard, rather than being designed to suit a specific museum or collection type. Since then the system has expanded to include comprehensive support for natural history, archive and library collections. New modules providing programming interfaces, support for online collections, and RFID-based location tracking.

Future development

- Analyse image colours with computer vision to allow searching by colour.
- Extend Application Programming Interface (API) to allow data to be written from web interfaces and 3rd party products.
- Create topic pages in Vernon Browser online access module as another method for providing contextual/grouping information.
- Migrate existing help content into a web-based help system.
- Improve user interface.

Demo version

Yes

Support

Support methods

Vernon CMS has built-in help, down to the field level. The Annual Support Agreement includes support by phone, email or via our Customer Support Portal. We offer onsite and online training.

Support language(s)

English

Support availability and hours

9 a.m. - 5:30 p.m. New Zealand time, Monday to Friday. Agents on call in UK and South African time zones.

Support fees

The optional Annual Support Agreement cost is 20% of the licences held. This includes all software upgrades and access to support by phone, mail or via the Customer Support Portal.

Client support network

Yes. The Vernon CMS Customer Support Portal.

Training

Yes. The minimum length online session is one hour.

System updates and maintenance

System updates and maintenance are included in the annual support agreement.

Cost

Pricing

The foundation of Vernon CMS is the Cataloguing module. This includes all necessary fields and functions to manage a museum collection. Optional add-on modules include Activities module,

Browser module, External Tracking System module for RFID location management and Web Messenger module. Additional user licences can be added at any time. The Annual Support Agreement is 20% of licences help and is mandatory for the first year and optional on an ongoing basis.

Pricing outlines can be found on the Vernon Systems website.

Maintenance costs

Software upgrades are included in the Annual Support Agreement.

System specifications

Operating systems supported

Minimum server specification

- Pentium III or 4 (or AMD Equivalent)
- 1 GB RAM
- 50 GB Hard Drive
- Backup
- Windows 2008 or 2012 Server

Minimum workstation specification

- Pentium III
- 1 GB RAM
- 10 GB Hard Drive
- Windows Vista, 7, 8 or 10

Underlying database

Vernon CMS uses Revelation Software's (RevSoft) OpenInsight (Linear Hash DBMS) as its database. Programs and data are stored in a single folder structure, usually referred to as Wincoll. Version 11 release date is October 2017. No additional fees are associated with the latest software upgrade.

Platform(s)

Vernon CMS clients can run on Windows Vista or above workstations, or on other operating systems such as a mobile device or Mac OS via Microsoft Remote Desktop or Citrix on-demand access software.

Hardware requirements

Minimum workstation specification

- Pentium III
- 1 GB RAM
- 10 GB Hard Drive

Staff requirements

Vernon CMS can be maintained by existing museum employees.

Plug-ins and/or modules available

Optional add-on modules include Activities module, Browser module, External Tracking System module for RFID location management and Web Messenger module. Additional user licences can be added at any time. The Annual Support Agreement is 20% of licences help and is mandatory for the first year and optional on an ongoing basis. These are all developed by Vernon Systems. External Tracking System Module is designed to work in conjunction with SmartTrack software and additional software and hardware costs are required.

Third-party requirements

No. There are no third party requirements. Microsoft Word and Microsoft Excel integration is included in Cataloguing module and can optionally be used for reporting and data exports.

Interoperability

Vernon CMS includes a variety of API and export options. The list of third party integrations is significant and includes common Digital & Document Management Systems, Digital Asset Management Systems, Content Management Systems, and RFID-based location tracking software. We would be happy to discuss specific integration requirements.

Accessibility

Vernon CMS' web module - Vernon Browser - meets WCAG 1.0 Level-AA accessibility standards.

Customization

The user can customise user views (a dedicated viewing screen), add user defined fields, define security settings, save searches, and save reports. More extensive customisation can be applied as a service by Vernon Systems, such as specialised data entry screens.

Web integration capabilities

Cloud functionality

Vernon CMS must be installed locally, and accessed by workstations connected to the local network or remotely via Microsoft Remote Desktop or Citrix on-demand software. The Browser module allows publication of selected collection records in a read-only format. Vernon Systems offers hosting as a service.

Server location
: The Vernon CMS server is usually installed on the client's own server. Vernon Systems does offer Windows server hosting. Browser hosting is supported in UK and US data centres.

Security protocols
: No response.

Typical or average uptime
: 99.9% availability.

Back-end maintenance procedures and downtime
: The system must be offline for backups and upgrades.

Browsers supported

Browser web module

- Internet Explorer 9.0 and above
- Firefox 32.0 and above
- Chrome 42.0 and above
- Safari 7.0 and above
- Edge 38.14393 and above

Web-based access for data entry

No. Vernon CMS does not offer data modification through a browser.

Web publishing platform

Vernon CMS can publish collection data to the web via the Browser module. Records and images can be published to our Browser Templates as a public or private website, or pushed as data to be included in third-party applications. The API is not open source.

Linked open data functionality

No

User groups and security

User profiles

Yes. There are profiles for each user. You can allocate as many individual user logins as required. The number of concurrent users is defined by the number of user licences. Multiple users can be editing at the same time. They cannot be modifying the same objects simultaneously.

User groups

Vernon CMS allows for administrator accounts, with full access and customisable user accounts. Permissions can be set to view and/or modify fields down to the field level. User accounts can be allocated a class of permissions, and then individually modified.

Visitor profiles

A read-only visitor profile does not come preinstalled, but could be set up by an administrator.

Installations

Vernon CMS can run on multiple workstations. The restrictions are access to the local network and a workstation running Vernon Client Software.

Audit trails and/or edit history

Yes. Vernon CMS has a complete audit log showing all modifications that the user login to make those changes. The audit log is searchable and modifications can be rolled back.

Offline access

Yes. Vernon CMS is usually hosted on a client's internal server, although Vernon CMS can provide hosting. It is possible to run Vernon CMS on a single workstation with no external connectivity.

Privacy features

Yes. Access can be secured with individual passwords and there is no facility to modify the database from an external source. Individual images can be tagged as not for publication. The fields that a user can access to view or modify can be limited by the administrator. Any modifications to the database are recorded in an activity log. Data restrictions can be set to depend on data in the record being accessed, e.g. only allow users from the natural sciences security group to edit records where the Department field is set to Natural Sciences.

Data migration and stability

Import formats

There is an XML Import tool to create or update existing records, and users can also cut and paste via the Windows environment. The XML Import tool can convert data from MARC and Excel formats into XML for import.

Data migration services are usually provided offered by Vernon Systems, but clients can use the XML Import tool directly. There is a fee per day for data migration services. An analysis of legacy data import is a free and confidential service towards a quote for new clients.

Export formats

Users can export to XML, comma and tab separated text files (CSV), and PDF formats.

Backups

Vernon CMS does not require any special backup software. The recommended backup unit is any standard tape or disk backup as part of a daily backup routine.

Standards and schemas

Metadata schemas

- Dublin Core
- Darwin Core
- Spectrum
- CDWA Lite
- CIDOC CRM Core
- MARC
- KML
- EXIF

Data content standards (cataloguing rules)

- CCO
- RDA
- EAD
- Spectrum

Vocabulary standards

- The Getty Art & Architecture Thesaurus (AAT)
- Linnaean classification system (subsets of terms imported on request)
- New Zealand Geographic Places
- Chenhall's Revised Nomenclature
- The Social History and Industrial Classification (SHIC)
- Taonga Māori Thesaurus

Local terminology lists

You can create your own authority term lists (and will need to do so for terms that are specific to your organisation, such as Location terms). Terms can be imported into your system in bulk, using the XML Import tool, or terms can be added manually. New terms can be created at any stage by those with the security rights. Authority terms can be multi-lingual with linked translation terms.

Accreditation

- Spectrum
- CIDOC CRM Core

Data entry and content

Media upload/linking

Yes. Media can be uploaded to the database. Vernon CMS stores a file path to the media location on the network, and automatically creates a working derivative for onscreen display and reporting. On a double-click your media file will be opened in your preferred software. Vernon CMS has tools for bulk uploading of linking images based on matching parts of the image filename with the identifying numbers on the object record.

Media formats supported

- BMP
- PCX
- TIFF
- DXF
- EPSF
- FlashPix
- WMF
- Targa
- IMG

- JPEG
- WPG
- PCD
- PNG
- GIF
- AVI
- MPEG
- WAV
- MID

Data entry features

Copy and paste
: Yes, including copying the whole previous record, a set of fields from the previous record, or an individual field from the previous record.

Search and replace
: Yes. You can find and replace in a single record or selection of records.

Spellcheck
: Yes, with an English dictionary. Words can be added to a custom dictionary in bulk by editing the custom word list, or a single word at a time during a spell process.

Bulk cataloguing
: Yes

Batch edit
: Yes

Batch location change
: Yes

Duplicate record search
: Yes. Duplicate accession number search. Similar record warnings for people records with similar names.

Template record
: Yes

Date selection and formats
: Yes. Supports common precise date formats (month-day-year, day-month-year, various month and year formats) and imprecise date formats (month & year, year, decade, century, plus imprecision keywords such as circa, early, mid, late, pre, post).

Mandatory fields
: Yes

Others
: No response.

Spreadsheet editing view

No, spreadsheet function allows for viewing records and editing which records are included in the list, but not the fields within each record.

Geographic mapping

Yes. Objects, sites and places can be marked with a map reference or latitude/longitude point or rectangle. Map data can be exported in KML map data format for presentation in software such as Google Maps or ESRI.

Multilingual fields

No. Vernon CMS supports Unicode but is not multi-lingual.

Barcoding

Yes. Support for barcode printing is built into the Cataloguing module (no additional cost). A barcode reader can be used anywhere in the system where object records, locations or packing units are selected.

Labelling

Yes. The built in reporting includes integration with Microsoft Word. Templates can be created in Word and they can be automatically populated with collection data via micros.

Search and reporting

Types of search supported

Boolean queries
: Yes

Query any field
: Yes

Sort query results
: Multi-level

Saving search results
: Yes

Filter search results
: Yes

SQL-based search
: No, but native database queries (Select statements) can be performed on the underlying OpenInsight database structure.

Export search results

Yes. Users can export search results to XML, comma and tab separated text files, and PDF formats.

Free-text (Google) searches

Yes

Search result views

Browsing in a custom view screen or data entry screen, list mode, thumbnail image mode.

Multilingual searching

Yes

Report styles included

Column or form listing, Microsoft Word mail merge, banded reports, and raw data exports.

Report customization

Yes. Ad hoc reports can be created within the built-in reporting tool. Integration with Microsoft Word for complex form or label reports.

Report program

Vernon CMS has built-in reporting.

Museum functions

Collections management function overview

Vernon CMS manages all common collection processes, including acquisitions, loans, exhibitions, conservation, rights, public access, and deaccessions. The implementation is based Collection Trust's Spectrum museum standard. A full range of standard media file formats are supported. Web and file links can also be added to catalogue records for other related digital data.

Registration

Set up multiple accession number formats and control defaulting of accession number. Accession number duplicate checking. Dozens of registration specific fields including tables for registrarial comments and other identifiers for the objects. Generate forms at the end of the accession process.

Acquisitions

Record individual acquisitions or acquisition lots with details about the acquisition (source, method, date, notes, etc.).

Inventory management

Record location at time of inventory. Record details on the completeness of an object. Reconcile lists of objects found at a location with the list of objects that are currently recorded as being in the location.

Internal tracking

Details fields for current location, usual location and location history. Move single objects or move in bulk, move online or offline, integration with 3rd party RFID-based location tracking system (SmartTrack).

External shipments

Catalogue non-accessioned objects (loans, considered items).

Detailed activity file to track planned movements and bulk update the records once the movements has been actioned. Planned movements can be recorded for objects not recorded separately in the system (e.g. objects currently being considered for acquisition).

Cataloguing

Dedicated screens for library, archives and general history/arts objects. Custom screens can be developed to support any specialised collection. Extensive natural science fields, including support for classification hierarchies, bulk reclassification of specimens. A separate file for site/collection event details can be linked to multiple objects/specimens.

Create custom hierarchical pick lists, search and sort on imprecise dates, validate accession numbers and measurements, manage objects at part level.

Link external files and web pages.

Conservation

Record detailed condition, completeness and treatment detail at object level. Track condition report and treatment processes as activities which relate to one or more objects, and link these to other activities such as exhibitions and loans. Link external files such as Word and PDF condition reports.

Curatorial research

Retain histories of curatorial comments and research notes. Create topic/narrative records linking to multiple objects, activities or subjects. Topic records can represent wall labels, published articles, and collection summaries.

Publications and printed material

Create records for documents and publications and link these to objects as a bibliography.

Rights management and reproduction

Record current and historic rights information on each object record. Manage rights clearance (inward rights) and rights assignment (outward rights) through detailed activity records. Record the publication status of individual media files.

Risk management and valuation

Record valuation histories. Record insurance policies and link these to individual objects or object groups. Record risk details and significance information.

Exhibitions

Record exhibition histories at object level. Manage exhibition planning for single venue and multi venue exhibitions.

Loan management

Manage inward and outward loans for single objects and groups of objects. Track correspondence with lenders and borrowers. Generate loan agreements. Record contact information. Link loans to other activities such as condition reports and exhibitions.

Deaccessions

Record deaccession information at object level. Manage planned deaccessions and bulk update groups of objects if a deaccession is approved.

Digital asset management

Link image, audio and video files. Set standard derivative sizes and allow the system to generate these as required. Import EXIF metadata from image files. Set default viewing software by media file type. Record timecode details. Server size is dependent on the volume and type of media files.

Vernon CMS can also be integrated with a third party DAM.

Additional features and functions

- Supports automated image analysis (detection of colours, image orientation, and subject keywords).
- Sophisticated built-in reporting tool.
- Variable length & repeatable fields.
- Define multiple valid accession number formats.
- Support for imprecise dates.
- Advanced searching tools.
- Manage object groups and parts.
- Bulk update facilities.
- Spare user definable fields within the standard system.
- Create custom procedural for all object workflows.
- Bulk import new records or Bulk update existing records from external data.

Vernon CMS by Vernon Systems - Evaluation

About this evaluation

This evaluation was performed on February 14, 2018 with a representative from Vernon Systems. It was evaluated by 12 members of the museum community and reflects their personal opinion. These evaluations were based on a set list of tasks in a limited period of time. It is always recommended that you request a demonstration of any product in which you may be interested based on your specific.

Evaluator ratings

The following table shows the ratings given to this software by members of the museum community. To understand what these ratings mean, please refer to our Scoring System & Evaluation Guide.

Each rating given is scored out of a maximum of five points. The larger the Standard Deviation number, the wider the range of scores for that task.

Task	Average	Standard Deviation
Online data entry	0.6	1.1
Publish a record to the web	3.3	0.8
Set user permissions and groups	3.3	0.7
View audit trails or change log	4.1	0.7
Import data	3.8	0.6

Export data	3.6	0.7
Create a local terminology list	3.7	0.7
Upload or attach images and files	3.4	0.8
Catalogue an object	3.8	0.5
Batch modify a set of records	3.3	0.8
Multilingual capabilities	2.0	0.7
Customize a catalogue entry page	2.8	0.7
Create a template record	3.5	0.9
Generate and/or build a report	3.4	0.8
Perform basic search	3.5	0.7
Perform advanced search	3.3	0.6
Browse records	2.9	1.0
Create an exhibit	3.3	0.6
Enter condition report information	3.4	0.7

Evaluator comments

The following comments have been provided by our evaluators after they rated the performance of each task. These are selected comments drawn from the “Additional Comments” section of the evaluation form.

- We did not see a number of collections management activities (accessioning, deaccessioning, loans) or party records. Nor did we see much of process and task tracking. With a concentration on cataloging, it is difficult to gauge this product as a full collections management system.
- Very powerful and complex, but UI seems a bit dated and sometimes hard to follow. Many functionalities go way above and beyond expectations, but I think extensive training would be needed.
    - *Vendor response*: Vernon CMS manages 14 core collection management processes including acquisitions, accessioning, deaccessioning, loans, rights, and conservation. Acquisitions can be planned and assessed for individual objects or groups of objects, and group acquisitions can be updated in bulk when acquisitions are approved or declined. Inward and outward loans can be managed in detail, with emails and agreements automatically triggered at appropriate steps in the process. Party records are managed through the person file where records can be created for individuals and organisations complete with full biographical and contact information. Detailed service or biography records can be created for people in specialist collections such as military archives.

    - Improving the user interface (UI) is a key change in upcoming versions. Version 12 (late 2018) includes improvements to the main application toolbars and migrates the extensive user help to a modern web format.
- Overall, I thought that this product seems to have a lot of capabilities. The recurring thought I kept having however, is that the product does not seem users friendly or intuitive at all. For small institutions I think this product will be beyond them. Even for some larger institutions, some staff might find that the system is a bit clunky to work in and may have a good sized learning curve. Overall, there seemed to be a lot of steps/windows/lists to navigate between to perform basic functions. The UI also seemed very dated.
- There are some good built-in verification elements to ensure quality control as staff is entering data.
- Procedural status field is included in most modules (and is a nice feature). This field indicates a process or approval stage in the collection management activities. Client can create rules for each process/approval to ensure staff do not overlook required information or steps. Process management and quality control.
- Vernon appears to be a complex system with many fields and templates, but this complexity allows the system to offer more options to its clients.
- Overall, this was one of the better products I have seen in this process. Very well designed to meet the best practices of traditional museum collections management. Room for improvement is around more future-looking approaches to museum collections, things like multi-lingual and end user generated knowledge.
- Clear straightforward database.
- Interface is a bit dated – Windows 2000? 2005?
- It is nice that it is compatible with Microsoft suite.
- A good system with some minor drawbacks. The asset is the automation for many of the tasks, which makes using Vernon very efficient.
- The system is powerful but the interface is clunky and old-fashioned looking. My users would not use it.

eHive by Vernon Systems - Profile

Note

This profile was completed by the software vendor at CHIN's request and does not reflect the views or opinions of CHIN. It is presented for information only and does not indicate approval or accreditation by CHIN. Inclusion of specific products does not mean that CHIN recommends the software, but that members of the community expressed interest in learning about these products.

This information was accurate as of January 2018. For more information or to request updated information, please contact the vendor directly.

Product name

eHive

Vendor name

Vernon Systems

Vendor overview

Website URL

https://ehive.com/

Head office

Auckland, New Zealand
Year founded: 2008 (product release date)
Telephone number: +64 9 815 5599
Fax number: +64 9 815 5596
Email: info@ehive.com
Contact person: Paul Rowe

Product overview

Product description

eHive is a web-based collection cataloguing system aimed at small museum and private collectors. It makes cataloguing and publishing of your collection easy and affordable. Content can be accessed via our APIs and WordPress plugins.

We take care of the hosting, server maintenance, software upgrades, and backups.

Disciplines supported

There are seven different Object Record types in eHive to accommodate different types of collections: archives, archaeology, art, history, library, natural science, and photography and multimedia.

Product launch date

November 2008. The most recent major technical upgrade was May 2016.

Product history

eHive is the product of extensive research and consultation with the culture and heritage sector. The system was originally designed to meet the collection management needs of smaller organisations and individuals, and to provide a viable avenue for online publishing. These days a growing number of larger institutions using other collection management systems have chosen to also use eHive as a platform for publishing their collections online.

Future development

- Provide multi-user, multi-level security.
- Implement International Image Interoperability Framework (IIIF) to provide a wider range of image viewing options including pan and zoom.
- Add detailed person record cataloguing screens.

Demo version

Yes. A free account is available.

Support

Support methods

eHive support is primarily provided via the ticketing system and forums on our Customer Support Portal. We offer online training and group workshops.

Support language(s)

English

Support availability and hours

9 a.m. - 5:30 p.m. New Zealand time, Monday to Friday. Agents on call in UK and South African time zones.

Support fees

Support can be purchased at a per hour rate.

Client support network

Yes. The eHive Customer Support Portal.

Training

Yes. The minimum length online session is one hour.

System updates and maintenance

System updates and/or maintenance are applied automatically at no cost as part of the annual subscription.

Cost

Pricing

eHive accounts are available on an annual subscription basis covering use of the software, storage and ongoing development. The amount of storage you use determines the level you need to purchase. Additional storage is available beyond Level 4.

Pricing options can be viewed on the eHive website.

Maintenance costs

Software upgrades are applied automatically at no additional cost.

System specifications

Operating systems supported

eHive is Software as a Service (SaaS). It can be accessed by any computer or device able to connect to the internet via any modern web browser.

Underlying database

Relational database. MySQL.

Platform(s)

eHive is Software as a Service (SaaS). It can be accessed by any computer or device able to connect to the internet.

Hardware requirements

eHive is Software as a Service (SaaS). It can be accessed by any computer or device able to connect to the internet.

Staff requirements

eHive can be maintained by existing museum employees. The system is maintained by Vernon CMS.

Plug-ins and/or modules available

No. All eHive functionality is included in the yearly subscription.

Third-party requirements

No. There are no third-party requirements.

Interoperability

eHive includes a public API for bespoke integration with other products. WordPress plugins are provided for building public online collection sites.

Accessibility

eHive meets WCAG 1.0 Level-AA accessibility standards.

Customization

Custom public websites can be developed using eHive's WordPress plugins or API.

Web integration capabilities

Cloud functionality

eHive is entirely cloud-based.

Server location
eHive is hosted through Amazon Web Services in the Virginia availability zone.
Security protocols
No response.
Typical or average uptime
99.9%
Back-end maintenance procedures and downtime
Zero downtime for backups and upgrades.

Browsers supported

- Internet Explorer 9.0 and above
- Firefox 32.0 and above
- Chrome 42.0 and above
- Safari 7.0 and above
- Edge 38.14393 and above

Web-based access for data entry

Yes. Data can be entered through a web browser with no restrictions.

Web publishing platform

eHive does publish collection data to ehive.com website. Collection data can also be accessed through the API and WordPress plugins. The API is not open source.

Linked open data functionality

No

User groups and security

User profiles

eHive has just one login per account. Multiple users can use this one login to access the database and simultaneously edit records. They cannot be modifying the same objects simultaneously.

User groups

No. eHive has just one master login with no restrictions. Multi-user accounts are on our roadmap for release in 2018.

Visitor profiles

No. eHive has just one master login with no restrictions, although public users have read-only access to any published records.

Installations

There is no practical limit to the number of computers that can access eHive simultaneously.

Audit trails and/or edit history

No. eHive does not have an audit log.

Offline access

No. eHive is a cloud-based service and requires an internet connection.

Privacy features

Yes. Objects can be made private so that they can only be accessed with the administration password.

Data migration and stability

Import formats

Yes. eHive can import via XML or Excel formats. Bulk imports are run by Vernon Systems staff against a test server first.

Export formats

Users can export to XML, comma separated text files (CSV), Excel, and PDF formats.

Backups

eHive is a web-based system. Daily backups are run on the system, with separate copies kept in the data centre and remotely.

Standards and schemas

Metadata schemas

- Dublin Core
- CIDOC CRM Core
- CDWA Lite

The Object fields are based on the Spectrum standard.

Data content standards (cataloguing rules)

- CCO
- Spectrum object fields

Vocabulary standards

Taonga Māori Thesaurus, plus other vocabulary lists imported on request.

Local terminology lists

eHive has dedicated Pick List fields (authority controlled fields) for which clients can create their own terms. The terminology lists are not multi-lingual.

Accreditation

- CIDOC CRM Core
- CDWA Lite

Object fields are based on the Spectrum standard.

Data entry and content

Media upload/linking

You can drag and drop multiple images on the object image upload page.

Media formats supported

You can upload images in JPEG, TIFF or BMP formats, or non-transparent GIF or PNG formats. Each image should be less than 20 MB.

Data entry features

Copy and paste
: Yes, including copying the current record to a new record.

Search and replace
: No. Bulk deletion or addition of tags only.

Spellcheck
: Uses the spellcheck built into your web browser. Most common browsers support spellcheck in the selected default language for the browser.

Bulk cataloguing
: No

Batch edit
: No

Batch location change
: No

Duplicate record search
: No

Template record
: Yes. Copy current record option.

Date selection and formats
: No date selection option. Dates can be entered in any format.

Mandatory fields
: No

Others
: No response.

Spreadsheet editing view

No

Geographic mapping

Google Maps pin for the organisation's location, but not for individual object records.

Multilingual fields

No. eHive supports Unicode but is not multi-lingual.

Barcoding

Barcodes can be printed by exporting to Excel and printing via Word mail merge. A barcode reader can be used anywhere in the system where object records are selected.

Labelling

Data can be exported to Excel, from which labels can be printed using Word mail merge.

Search and reporting

Types of search supported

Boolean queries
Yes
Query any field
Yes
Sort query results
Single level
Saving search results
Saving search query only (a browser bookmark).
Filter search results
No
SQL-based search
No
Export search results
Yes. Users can export search results to XML, comma separated text files, Excel, and PDF formats.
Free-text (Google) searches
Yes
Search result views
Record summary and lightbox (thumbnail images) modes.

Multilingual searching

Yes

Report styles included

Multiple PDF formats, Excel, raw data exports.

Report customization

No, but data can be exported to Excel to use with Word mail merge.

Report program

eHive has built-in reporting.

Museum functions

Collections management function overview

eHive manages collection cataloguing and conservation activities in detail. The system includes tracking of current and historic locations. Summaries of other processes such as loans and exhibitions can be recorded. Common image file formats are supported. Web and PDF file links can also be added to catalogue records for other related digital data.

Registration

Accession number duplicate checking. Dozens of registration specific fields including tables for registrarial comments and other identifiers for the objects.

Acquisitions

Record individual acquisitions or acquisition lots with details about the acquisition (source, method, date, notes etc.).

Inventory management

Note completeness of an object. Update current location.

Internal tracking

Record current location and retain location history.

External shipments

Catalogue non-accessioned objects (loans, considered items). Text field for recording loan details.

Cataloguing

Dedicated screens for archaeology, archives, art, history, library, natural science, and photography objects. Create pick lists to standardise terminology. Link PDF documents.

Conservation

Record detailed condition, completeness and treatment detail at object level. Link PDF condition reports.

Curatorial research

Retain histories of curatorial comments and research notes.

Publications and printed material

Simple bibliography history on each object record.

Rights management and reproduction

Record current and historic rights information on each object record. Assign standard licences to the whole collection and override at object level. Override public access settings for images and documents at the image/document file level.

Risk management and valuation

Record valuation histories. Record risk details and significance information.

Exhibitions

Record exhibition histories at object level.

Loan management

Record simple loan summaries at object level.

Deaccessions

Plan deaccessions of individual objects. Record details of approved deaccessions.

Digital asset management

Link image files. eHive generates standard derivative sizes.

Additional features and functions

Features

- Create communities to connect objects from different museums based on a common theme.
- Use our WordPress plugins to build your own website.
- Share your records and images with third-party systems with the eHive API.
- Share your data with cultural hubs using the Open Archives Initiative standard.

eHive by Vernon Systems - Evaluation

About this evaluation

This evaluation was performed on February 14, 2018 with a representative from Vernon Systems. It was evaluated by five members of the museum community and reflects their personal opinion. These evaluations were based on a set list of tasks in a limited period of time. It is always recommended that you request a demonstration of any product in which you may be interested based on your specific requirements.

Evaluator ratings

The following table shows the ratings given to this software by members of the museum community. To understand what these ratings mean, please refer to our Scoring System & Evaluation Guide.

Each rating given is scored out of a maximum of five points. The larger the Standard Deviation number, the wider the range of scores for that task.

Task	Average	Standard Deviation
Online data entry	3.6	0.5
Publish a record to the web	3.2	1.3
Set user permissions and groups	2.2	0.8
View audit trails or change log	2.2	0.4
Import data	2.0	1.2
Export data	3.0	0.7
Create a local terminology list	3.2	0.8
Upload or attach images and files	4.0	0.7
Catalogue an object	3.2	0.4
Batch modify a set of records	2.0	1.2
Multilingual capabilities	1.4	0.9
Customize a catalogue entry page	1.6	0.9
Create a template record	3.4	0.9

Generate and/or build a report	3.0	0.0
Perform basic search	3.4	0.9
Perform advanced search	2.2	1.3
Browse records	3.4	0.9
Create an exhibit	2.0	0.7
Enter condition report information	3.2	0.4

Evaluator comments

The following comments have been provided by our evaluators after they rated the performance of each task. These are selected comments drawn from the “Additional Comments” section of the evaluation form.

- This product can perform basic functions but is not very robust, flexible or customizable.

- About 1000 museums using eHive. Very impressive little system and would be incredible for a small museum. Free for up to 5000 objects, $99 per year!
- Very user friendly, nice interface! Many functionalities went over and above my expectations even for a larger system.

- This product seems like it is probably very valuable to smaller institutions and collections. It seems to perform the basics really well, but lacks some bells and whistles that might be able to get the collection management tasks up to the next level. The UI is very attractive, as well as user friendly and intuitive. For places needing to handle a large amount of objects, whoever the pricing function may not make much sense for them. Also, if they are looking to be able to manipulate their data internally, this product will not allow for much.

- Simple database – over 800 000 public records on eHive. Could be a nice solution for smaller institutions.

- Web-based product seemed meant for presenting collections rather than managing them. Probably sufficient functionality for small collections.

CollectiveAccess - Profile

Note

This profile was completed by the software vendor at CHIN's request and does not reflect the views or opinions of CHIN. It is presented for information only and does not indicate approval or accreditation by CHIN. Inclusion of specific products does not mean that CHIN recommends the software, but that members of the community expressed interest in learning about these products.

This information was accurate as of January 2018. For more information or to request updated information, please contact the vendor directly.

Product name

CollectiveAccess

Vendor name

Whirl-i-Gig

Vendor overview

Website URL

http://www.collectiveaccess.org

Head office

Year founded: 1995
Telephone number: +1 (347) 678 0513
Email: info@collectiveaccess.org
Contact person: Seth Kaufman, President

Canadian/North American office

Year founded: 1995
Telephone number: +1 (347) 678 0513
Email: info@collectiveaccess.org
Contact person: Julia Weist, Senior Consultant

Product overview

Product description

CollectiveAccess is open-source collections management and presentation software designed for museums, archives, and special collections. As it is highly flexible and easily customized, it is also increasingly used by libraries, non-profits, private collectors, artist studios, performing arts organizations and other groups around the world. At its core, CollectiveAccess is a relational database that enables complex cataloging, powerful searching and browsing and nuanced web-based collection discovery.

Disciplines supported

CollectiveAccess is a good fit for many museums, archives, arts organizations, scientific research projects, libraries, non-profits, academic environments, private collectors, artist studios, performing arts organizations and more.

Product launch date

2007

Product history

CollectiveAccess was developed to meet a growing demand for a highly customizable collections management tool for specialized and complex collections. From its earliest development, the project's founders sought to accommodate the need for support of both established archival and library standards, and the inevitable idiosyncrasies of real-world institutional needs. For ten years, the CollectiveAccess team has worked one-on-one with organizations around the world to create specialized metadata schemas and workflows for collections ranging from paleontological specimens, fine art, local history and diverse multimedia.

Future development

Development is ongoing. We issue a major release approximately every 6 months, with minor and maintenance releases every few weeks.

Demo version

A demo is available.

Support

Support methods

Free support is available via our Forum

Support chat

Wiki

We also offer paid support blocks. Please contact us for more information.

Support language(s)

English, French and Spanish.

Support availability and hours

Monday – Friday (excluding all US Federal holidays) from 9 a.m. - 5 p.m. EST.

Support fees

Ongoing and ad hoc support is available. Please contact us for rates.

Client support network

The support forum and chat is active with not only developers of CollectiveAccess but also users speaking directly to each other. There are also several user groups in the US and abroad, such as: Collective Access Community.

Training

In person and remote training is available. Please contact us for rates.

System updates and maintenance

Maintenance updates are released every few weeks.

Cost

Pricing

CollectiveAccess is open source, meaning it's free to use and share. There are no licensing or subscription fees and unlimited users.

Maintenance costs

All software versions and updates are free. If users need help updating their system they can utilize the support forum or paid dedicated support.

Additional fees

Whirl-i-gig works directly with clients on project collaborations. Pricing for these custom implementation is dependent on system specs and requirements. Feel free to contact consulting@collectiveaccess.org for more information.

System specifications

Operating systems supported

Linux, Mac OS X 10.7+. Windows (Server 2008, Server 2012, Windows XP and Windows 7, 8 and 10 verified to work) is supported but discouraged. Operating system specific notes are available on our wiki.

Underlying database

MySQL

Platform(s)

Runs on a web environment, though can be run on an internal network or single machine - internet connectivity is not required.

Hardware requirements

1 GB of RAM is usually adequate, up to 4 GB of RAM if processing large media files. Data storage requirements are commensurate with the media being uploaded to the system. Any modern CPU should provide adequate performance. It is advisable to obtain at least a 2-way and, if possible, 4-way machine. The extra processor cores are usually not an expensive add-on and often prove valuable in production environments. More detailed recommendations are available on our wiki.

Staff requirements

None

Plug-ins and/or modules available

Please see our wiki for more information.

Third-party requirements

All software dependencies are open source. There are no closed-source third-party products required.

Interoperability

The software supports exports to many third-party products (such as Microsoft Word and Excel) but these are not required and other export formats are available.

Accessibility

Project elements, such as front-end implementations, can be customized to be WCAG accessible.

Customization

All metadata, search and browse functionality, reporting tools, import and export formats are customizable to the user's specification.

Web integration capabilities

Cloud functionality

Server location
: The software can be installed on a server selected and configured by the user.

Security protocols
: Depends on the server solution chosen by the user.

Typical or average uptime
: Depends on the server solution chosen by the user.

Back-end maintenance procedures and downtime
: Depends on the server solution chosen by the user.

Browsers supported

All modern browsers are supported.

Web-based access for data entry

CollectiveAccess is accessible anywhere with an internet connection.

Web publishing platform

Providence, the cataloguing component, and Pawtucket, the public collection browsing component, are both accessible via the web.

Linked open data functionality

CollectiveAccess integrates with a variety of linked open data repositories including but not limited to the Getty vocabularies, the Library of Congress Authorities, Google mapping, Geonames and more. There is also a framework for configuring new linked open data interoperabilities.

User groups and security

User profiles

Supported

User groups

Supported

Visitor profiles

Supported

Installations

The software is installed on one server and can be accessed from as many computers as is required, assuming the server is adequately provisioned.

Audit trails and/or edit history

Available through detailed Logs.

Offline access

Possible, depending on the project’s configuration.

Privacy features

Access Controls allows you to configure exactly who sees your data when cataloguing in Providence. User Groups allow you to create classes of users and define what tasks they are allowed to carry out (such as creating or deleting records), what types of records they are allowed to view or edit, and what fields they can access. Every feature of the software can be turned on or off on a per-user or per-group basis if needed. This allows you to create task-specific environments for researchers or interns, without risking any unwanted changes to your collection data. If using the public facing component, Pawtucket, records can always been hidden from public view if needed, by using the "public access" dropdown field.

Data migration and stability

Import formats

- XLSX
- XLS
- MySQL
- Filemaker XML
- Inmagic XML
- PastPerfect XML
- Vernon XML
- TEI XML
- PBCore XML
- RDF
- ULAN-linked data
- MARC
- MARC XML
- MODS
- Omeka
- EXIF
- CollectiveAccess (for migrations from one system to another)
- WorldCat
- TabDelimited
- MediaBin
- CSV Delimited

Export formats

- XML
- CSV
- XLSX
- Word (DOCX)
- PDF

- MySQL

Backups

- MySQL

Standards and schemas

Metadata schemas

- XML

Data content standards (cataloguing rules)

Content standards are customizable. Providence comes preinstalled with metadata standards including Dublin Core, Darwin Core, EBU Core, PBCore, CDWA-Lite/CCO, EAD, DACS, ISAD(G), VRA Core, and Spectrum. These can be modified to the user's specifications, or entirely custom metadata schemas can be authored using our XML syntax.

Vocabulary standards

The Getty vocabularies, Library of Congress Subject Authorities, Chenhall, and many more.

Local terminology lists

Custom vocabularies can be developed on a per-project basis as needed.

Accreditation

The software supports a wide range of metadata protocols that are accredited by international organizations. Please see our wiki for more information.

Data entry and content

Media upload/linking

After you have uploaded your desired media to Providence, an exact copy is stored in the media folder. Additionally, a series of lower-res derivatives are created for use within the system and for public presentation, if applicable. Additional derivatives can be created to the project's specification with some simple configuration. Media can be watermarked with the institution's logo during this process, if desired.

Media formats supported

Any file can be uploaded to Providence and stored. In-browser preview is available for:

- JPG
- GIF
- TIFF
- PNG
- TilePic
- Camera RAW
- Photoshop PSD
- JPEG-2000
- DICOM
- DPX
- Open EXR
- QTVR
- Adobe DNG
- MP3
- AIFF
- WAV
- AAC
- Ogg Vorbis
- MPEG-2
- MPEG-4
- QuickTime
- Windows Media
- FLV
- Ogg Theora
- AVI
- PDF
- Microsoft Word
- Microsoft PowerPoint
- Microsoft Excel
- ED
- STL
- PLY

Some specialized format may require additional software components, please check the wiki for details.

Data entry features

Copy and paste

Available with any modern web browser.

Search and replace

Available with the CollectiveAccess Batch Editor tool.

Spellcheck

Available with most modern web browsers.

Bulk cataloguing

Supported

Batch edit

Supported

Batch location change

Supported

Duplicate record search

Not currently supported with a graphical user interface.

Template record

Record templates can be created and configured per user or across teams.

Date selection and formats

Please see our wiki for more info: http://docs.collectiveaccess.org/wiki/Date_and_Time_Formats.

Mandatory fields

Optional

Others

No response.

Spreadsheet editing view

Supported

Geographic mapping

Supported

Multilingual fields

Supported, as well as multi-lingual cataloguing.

Barcoding

Supported

Labelling

Supported

Search and reporting

Types of search supported
: No response.

Boolean queries
: Supported

Query any field
: Supported

Sort query results
: Supported

Saving search results
: Supported

Filter search results
: Supported

SQL-based search
: MySQL search is supported.

Export search results
: Supported

Free-text (Google) searches
: Supported

Search result views
: Multiple, customizable views supported.

Multilingual searching

Supported

Report styles included

Standard reports are pre-installed, which can be customized on a per-project basis.

Report customization

Supported

Report program

Search results are exportable as Word, Excel (tab delimited or CSV), and PDF.

Museum functions

Collections management function overview

No response.

Registration

Registration work flows can be customized to the institution. A wide array of registrarial tools are available including Location tracking, condition reporting, loan tools and more.

Acquisitions

The “Object Lots” module allows for the in-depth cataloguing of all collection acquisitions. Metadata and workflow is customizable on a per-project basis.

Inventory management

Multiple approaches to Loan management, storage location tracking and conservation events are available and customizable on a per-project basis.

Internal tracking

The “Object Location” tool is fully customizable and provides a quick summary of an object’s institutional lifetime from acquisition, exhibition, loan, conservation, storage and deaccession.

External shipments

The “Storage Location” module allows for the in-depth cataloguing of all object movements. Metadata and workflow is customizable on a per-project basis.

Cataloguing

Fully customizable interfaces are available for cataloguing all aspects of collections management, including objects, entities, places, loans, storage locations, acquisitions, object movement, vocabularies and other authorities such as historical events.

Conservation

The “Object Movement” module allows for the in-depth cataloguing of all object conservation events. Metadata and workflow is customizable on a per-project basis.

Curatorial research

Interfaces can be customized to include provenance and bibliographic information, as well as any other needed metadata.

Publications and printed material

Supported either as part of normal object-based cataloguing or with the creation of custom authorities. Publication information can be imported with use of the WorldCat tool, for institutions who have a paid membership to the WorldCat service.

Rights management and reproduction

Interfaces can be customized to include any needed metadata related to rights management.

Risk management and valuation

Interfaces can be customized to include any needed metadata related to insurance and financial information.

Exhibition

The “Occurrences” module can be used to catalogue exhibitions, events or other historical moments of interest. Metadata and workflow is customizable on a per-project basis.

Loan management

The “Loans” module allows for the in-depth cataloguing of all object movements. Metadata and workflow is customizable on a per-project basis.

Deaccessions

The “Object Lots” module allows for the in-depth cataloguing of all collection deaccessions. Metadata and workflow is customizable on a per-project basis.

Digital asset management

Providence can be used to store and catalogue any digital assets that are of interest to your collection.

Additional features and functions

Library circulation tool

The library module allows you to keep track of your library assets with customizable loan periods and email alerts if your items become overdue. Quickly see who has your circulating materials and when you can expect them back!

Sets

The “Sets” module allows users to create ad-hoc groupings of records for conducting practical tasks, such as creating a checklist of potential images for publication, or a group of records needing further cataloguing. Sets of records can also be sent to the batch editor for quick metadata cleanup.

Wikipedia

The Wikipedia tool allows you link a record to its corresponding Wikipedia entry. Once linked, Providence is able to ingest the entry title, main image and introductory text if needed.

Finding aids

Collections with traditional archival metadata structures can automatically create archival Finding Aids using the reporting tool. Customizable displays allow you to detail all of the relevant metadata and folder structures your users may need.

Visualizations

Search results can be displayed as a map, if geo-referencing data is available, or as timelines if date information has been catalogued. More visualizations are coming soon.

Dashboard

Each user has a customizable dashboard that allows them to quickly reference “watched” records, see which records were recently created, reference their last saved searches, as well as other useful tools.

LOLKatz

With the LOLKatz widget, cute kitties appear on your dashboard every day!

CollectiveAccess - Evaluation

About this evaluation

This evaluation was performed on February 9, 2018 with a representative from Whirl-i-Gig. It was evaluated by 19 members of the museum community and reflects their personal opinion. These evaluations were based on a set list of tasks in a limited period of time. It is always recommended that you request a demonstration of any product in which you may be interested based on your specific requirements.

Evaluator ratings

The following table shows the ratings given to this software by members of the museum community. To understand what these ratings mean, please refer to our Scoring System & Evaluation Guide.

Each rating given is scored out of a maximum of five points. The larger the Standard Deviation number, the wider the range of scores for that task.

Task	Average	Standard Deviation
Online data entry	4.3	0.5
Publish a record to the web	3.7	0.9
Set user permissions and groups	4.2	0.7
View audit trails or change log	4.2	0.7
Import data	3.7	0.8
Export data	3.9	0.8
Create a local terminology list	3.6	0.7
Upload or attach images and files	4.1	0.6
Catalogue an object	4.1	0.6
Batch modify a set of records	4.1	0.7
Multilingual capabilities	3.7	0.9
Customize a catalogue entry page	3.4	1.1
Create a template record	3.7	0.8
Generate and/or build a report	3.3	0.9
Perform basic search	3.9	0.6
Perform advanced search	3.9	0.6
Browse records	3.7	0.8
Create an exhibit	3.2	0.9
Enter condition report information	3.2	0.8

Evaluator comments

The following comments have been provided by our evaluators after they rated the performance of each task. These are selected comments drawn from the “Additional Comments” section of the evaluation form.

- Highly configurable – can be customized to do almost anything.
- Wow, I was so impressed by this system. So powerful and customizable, but with an easy to understand and elegant UI.

- I liked this product a lot. I would have liked to know a little more about the differences in records for objects, archives, etc.

- Set up to manage museum, archive and library;
- Extremely flexible database that is limited only by user and administrator's imagination and how the client wants to manage their collections.
- Developing and implementing database would take time, expertise and an understanding of the client's own needs. Product profile states various learning and training via Wiki, open forum and chat groups. I would question whether this is sufficient for setting up a CMS unless the institution had a software developer onboard. CollectiveAccess does offer custom implementation and 'project collaboration' for a fee.

- The software is very user friendly for doing the data entry, but the implementation, maintenance, migration, or upgrading must be done by a savvy person who will need to do a lot of reading on the software website and wiki, but support from the company is available with fees.

- Functions not covered or explained, plug-ins? How is donor/source information stored? Is Pawtucket free? Does it autocorrect? How does it handle deaccessioning records? Where can you input the status of a record? Can you include scanned documents to media? How do you input loans in/loans out?
- I was excited by how customizable CollectiveAccess is but I questioned how it handled non-artwork artifacts such as in mixed collections (tools, textiles, ceramics, furniture etc.) I went to the demo on the website but it did not cover this. Based on this I am not sure how it performs for mixed collections. The import and mapping is too complicated for the average user and administrator. Though CollectiveAccess gives you lots of options, there is a lot of work that has to be done by the administrator to set it up. CollectiveAccess is a great CMS for archives, libraries and artwork collections and, though there is a lot of preparation by the administrator beforehand, it is easy to train cataloguers on where to find basic information.

- This open source software application is very interesting and impressive. It seems easy to use.

- Highly customizable, per presenter.
- It is a bit concerning that it is not as easy to use on a Windows system, since many small museums are not going to be able to afford a Mac system.
- This seems like a good system for archival and fine art collections. Doesn't seem as friendly towards historical artifact and scientific collections. I can see how a museum could make it work or customize the database, but it would be nice to see artifacts added as a catalogue module.

- Great database in general, seems so customizable, which is great for large institutions. I liked the public interface features.

- Very intuitive and customizable, appears easy to use and adapt to collections. Availability via an online server seems an asset, as it allows it to be widely available, though with the downside that sites with limited or no internet access would have trouble using it.

- The database seems robust while also being user friendly. Open-source and web based are definite pluses. The level of detail for some of the functions is impressive, but there are also some areas that are lacking, particularly in the form and report development. It would be nice if they provided form templates for deed of gifts or temporary deposit receipts rather than expecting the client to develop those and upload them.
- As the database is open source I'm unsure of how the staff at Whirl-i-gig factor into the use of the database? Do they provide storage? Support?

- I liked the flexibility and interface of the CMS overall.

- Impressive system; curious about the privacy/access by external users (that would be my biggest drawback).