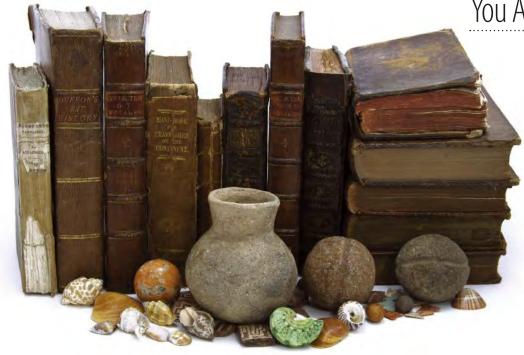# How Do We Select a Collections Management System?

By Zenobia Kozak

The variety and quality of collections management systems (CMS) software packages vary widely. One size does not fit all! Museums and cultural institutions manage a diverse array of collections, capture different types and levels of collection data, and put their databases to use in many different ways. While it is unlikely that one software solution will meet all of your institution's needs, you can take a methodical approach to the selection of a CMS. Once you develop a short list of suitable options, you can explore the world of system customization to help tailor the system to your needs.

What steps should we take before contacting a software vendor?

It is essential to start with an in-house needs assessment. Begin by identifying the database's intended user groups, from cataloguing intern to system administrator. Research the current format and location of all of your relevant collections data. Determine where and how a CMS can increase efficiency and introduce functions to help your museum reach your established goals.

Consider the size of your collection, anticipated collections growth over time, and your current IT environment and staffing capabilities. These factors can help determine your overall CMS budget. This budget should include not just the initial purchase and installation of necessary software (and, occasionally, hardware), but costs for data transfer, user licenses, add-ons and upgrades, and ongoing maintenance expenses.

Which format of CMS cataloguing best suits my collection?

For the most part, CMS software captures similar data regarding objects, loans, accessions/deaccessions, exhibit information and multimedia files. However, each system has a slightly different approach to organizing this information by object type. Some systems are more appropriate for homogenous collections, while others break down categorizations further. Be sure that the sub-categories covered by the CMS match the type and scope of your collections. Do you require a separate catalogue for archives? Photographs? Taxonomical terms or archeological sites?

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You Asked for It

If you have an encyclopedic collection, you may need a system that allows you to easily customize these categories and account for your various types of objects in a consistent manner.

Databases may have limitations on the types of information that can be recorded in certain data fields. For example, a data field designed to capture a numeric code may not accept alphabetic characters. Or, the system may not support special characters used in other languages. Depending on your current system and collection, these restrictions should be considered as part of your selection process.

What types of collections management activities does my CMS need to support?

Most CMS software provides inventory control and can track the movement

of objects at many different levels. For example, a single item can be tracked out of the museum and into a conservation studio, or an entire drawer of material to a location on display. This function may be particularly important if your museum needs to track multiple changing exhibitions or frequently receives and loans out objects. In this case, some systems offer a specific shipping module that tracks object movement outside of the museum.

Once collections data is consistently captured and organized in an appropriate manner, a CMS can prove to be an incredibly effective reporting tool. How does your staff organize and disseminate this information? What type of metrics does your staff report? Following your initial needs assessment, the museum's collections manager, cataloguer, registrar and any other relevant users should have the opportunity to test it. These individuals can articulate the specific needs of the collection, helping ensure that the potential system meets them.

What staffing and system needs will my CMS require?

Based on your CMS selection, you may need to appoint an individual to take on duties ranging from *ad hoc* technological maintenance to overall system administration. If you do not have an IT specialist on staff who is knowledgeable about databases, find out if the CMS vendor offers maintenance or system support agreements.

Stipulations on system access and restricted networked environments present additional challenges when selecting a CMS. Do you have government security or other regulatory requirements that the system or its hardware must meet? Do you need to apply data entry or data editing restrictions to users? Some systems have features that block the alteration of certain content or give warning messages when a data change seems abnormal. These features will guide your users and ultimately protect your data.

From a purely technological standpoint, you must ensure that the potential CMS will successfully integrate into your IT environment. Besides the main operating system, what other programs may need to interface with your CMS? Imaging software, security, barcoding and/or RFID readers, and sharing protocols are just a few of the additional software tools that may need to be integrated into your CMS. Software compatibility issues can cause considerable system interference, which could result in data corruption and even data loss.

Finally, you should select a technology and a vendor with the assumption of a long-term relationship. Your choice of a CMS will lock you in to a particular technology for some period of time, and depending on the system and support offered by the vendor, it may be difficult to migrate to another platform down the road.

After I've selected my CMS, how do I ensure my system is accurate and running successfully?

First, migrate your existing data. Throughout your needs assessment process, consider how you will transfer data from your current CMS or record-keeping system into your new system. If you plan to migrate several different databases and record-keeping systems into a single CMS, be sure to address how you plan to standardize and map all of these data fields appropriately. With a central database, all of the data should be standardized, not only to increase the efficiency of data entry but to maximize the efficacy of data searches. One way to ensure consistent data entry is to customize your system by placing limitations on data fields or by applying a limited vocabulary for users to select from. It is useful to research and follow industry guidelines or create in-house standards for the type and style of data you would like captured. Consider developing a collections management procedure handbook or cataloguing style guide not only as an introductory guide for new users, but as an ongoing reference tool.

Finally, conduct training sessions or hold workshops to introduce staff to the new system. It is important to keep on top of system upgrades and new version releases. The latest version of the software may include new functionality or affect the way data is captured or displayed. Be sure to take advantage of any training or information offered by the CMS vendor to ensure that yo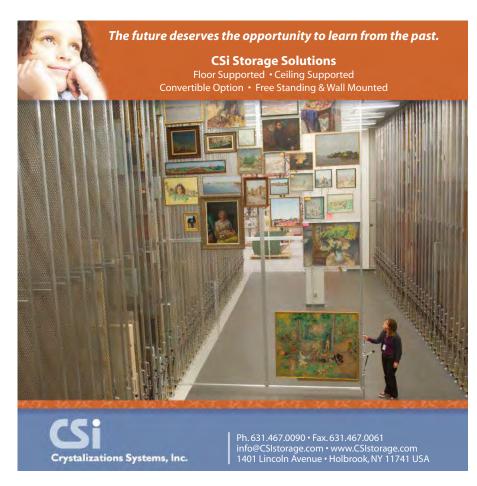ur users, data and system remain compatible. ●