Request for Information

Archive Management System

For the Israel Archives Network Project (IAN)

A cultural heritage project within the *Rehabilitation and Empowering of Cultural Heritage Infrastructure Framework of Projects* (TAMAR) of the Government of the State of Israel

Prepared by:	Chezkie Kasnett
	Project Manager, Israel Archives Network
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1 Introduction

1.1 Israel Archives Network Project

The *Israel Archives Network Project* (IAN) is a project within the *Rehabilitation and Empowering of Cultural Heritage Infrastructure Framework of Projects* (TAMAR) initiated by the Government of the State of Israel.

The objective of IAN is to preserve digitally the cultural heritage assets of archives throughout the State of Israel and to create a central access point to Israeli archival resources and digital collections through an Internet Gateway.

1.2 IAN Project Management

The IAN project is being jointly managed by the Heritage Division of the Office of the Prime Minister, the Israel State Archives and the National Library of Israel. In addition, the *Israel Archives and Information Association* is a key advisor and contributor to the project.

1.2.1 The Israel State Archives

The Israel State Archives is the national archives of the State of Israel. Founded in 1949, it is responsible for preserving and fostering the historical and organizational memory of the State of Israel and for the regulation of the Israel State Archives and all of the archives and records in government ministries, local authorities and government corporations in Israel.

The Israel State Archives is responsible for the management of the content and institutional participants of the IAN Project.

1.2.2 The National Library of Israel

The National Library of Israel (NLI) was founded in 1892 as a world center for the preservation of publications relating to Jewish thought and culture. Today, NLI serves a threefold purpose: it is the National Library of the State of Israel, the National Library of the Jewish People, and the Central Library of the Hebrew University for the Humanities.

NLI is responsible for the overall management of the IAN Project and the implementation and management of the technological solution and deployment.

1.2.3 Israeli Archives and Information Association

The Israeli Archives and Information Association (IAIA) is a non-profit organization. Founded in 1950, the IAIA aims to strengthen the public consciousness of national heritage and archival holdings, promotes professional discussion of issues and archival education, archival research, and provides guidance in records and information management and research. The IAIA represents the archive institutions participating in the IAN Project and is the professional advisory body for the IAN Project.

1.3 Background

The primary goals of the IAN Project are the *Preservation* of cultural heritage material that is in danger of being lost and providing *Access* to the rich quantity of cultural heritage material held in archives to the general public.

Many archives and their collections across the country are currently in danger of being lost as a result of degeneration of their material due to inadequate preservation, poor building conditions and inadequate funding, requiring immediate attention. Often, the material contained in these archives has never been catalogued or digitized and is essentially "locked away" from the public and the research community. The IAN Project aims to provide these archives with a complete archive management solution to catalogue their collections as well as digitization services in order to create a digital preservation copy of the archive and enable their discovery and use by the public.

In addition, on order to facilitate to the public access to this vast amount of cultural heritage material, the Project will create a centralized Cultural Heritage portal for search and discovery purposes. In the future, this portal will contain, or link to, the collections of museums as well.

The IAN Project will make accessible through the Internet a vast amount of important cultural heritage material that was previously unknown or inaccessible to researchers, students, and the public alike.

Many of the archives that will be included in the Project maintain an independent archive management system (AMS) and have performed digitization of their material in the past. In order to include the catalogues of these archives in the Project, a common metadata structure will be developed using EAD as a standard. The archives will then export their records to the IAN Project in accordance with the EAD. These records will be maintained in the AMS.

In addition to the Project AMS where the archive data will be stored and managed, NLI will maintain a preservation copy of each archive's catalog and digital repository in a national databank for long-term digital preservation.

To accomplish the stated goal of cataloging the collections and preserving the records and digital images of the archive's material, the IAN Project is seeking a software solution for the management of the archives participating in the project. The System will meet the requirements as set out in Section 4.

The project timeframe is seven years and consists of three phases.

> **Phase 1** – Will be executed during the first year of the Project. This phase includes defining and implementing the software and hardware

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infrastructure that will be necessary to achieve the Project goals. This phase will also include a pilot process of a selected number of archives that will be digitized and catalogued and a number of archives whose records and digitized images will be imported into the System.

Phase 2 – Will compromise years 2-7 of the project. During this stage, the project goal is to fully digitize and catalogue 50 archives. Additional archives will be encouraged to join the project on their own, utilizing the AMS System to catalogue their collections or to add their already catalogued collections to the Project enabling their collections to be accessible to the general public on the Project portal.

Phase 3 – Post-project maintenance. At this stage, the System will continue to be maintained and archives will be able to continue to take advantage of the AMS System and participate on their own in the IAN Project. Continued funding for digitization and cataloging will be dependent on government approval.

1.4 Solution Purpose

The IAN project is seeking a software solution from qualified vendors to provide an Archive Management System (AMS) to serve as a platform for the management of the archival material of all the archival institutions participating in the IAN project and their respective records and digital surrogates including the archival collections of NLI.

The IAN Project expects to select a software solution to be made available to all the archives participating in the IAN project.

In addition, the IAN Project may consider connecting with additional cultural heritage institutions including museums and libraries in the future to provide access to archival descriptions of records held at these institutions.

1.5 Statement of Need

The software solution will be a centralized Archive Management System (AMS) for the management of culturally important archival records located in archive collections throughout the State of Israel. A body designated by the Israel State Archives and the National Library of Israel will maintain and operate the system and its data on a day-to-day basis.

The AMS will enable small, yet culturally important archives with limited budgets to affordably manage their archive in an AMS from their physical location via an Internet connection. Large, established archives with systems of their own may

continue to manage their collections independently but will be able to export their archival records data and digital objects into the IAN AMS System and Digital Preservation System respectively.

The data contained in the AMS will be made available to the general public through a front-end Internet Gateway or Portal. While the front-end is not within the scope of this RFI, the AMS System is expected to support the discovery and access of the records and their related digital surrogates, including images and audiovisual material.

1.6 Solution Scope

The complete solution will consist of the following elements:

1. A backend data system that will contain the data records of the archives for purposes of archival collections management and preservation. The system will be expected to scale to hundreds of archival institutions and millions of records along with a copy or link to their respective digital surrogates.
2. A backend management module to manage each archive individually.
3. A backend administrative module to manage the overall solution.
4. (A Digital Preservation System for the storage and preservation of digital copies of the recorded item. (Separate system from the AMS)).
5. A data system that will serve as the database for the purpose of presentation to the public. (Database for presentation purposes, virtual or the same as Item 1.)
6. A Front-end presentation system for general access to the records and their digital images held within the System.
7. An interface within the above presentation system (#6 above) and backend management module for crowdsourcing – allowing the public to enrich catalog metadata of archival records.
8. A backend system for the processing of catalog data input from the public. The System will include moderating (approval) capabilities, as well as differentiation between 'expert' and 'non-expert' metadata.

1.7 Terminology

"Accession"   The acquisition of an item, i.e. materials transferred to an archival institution in a single accessioning action.

"AMS"	**Archive Management System**
"Applicant":	Any qualified party to provide the Solution, who submits a response to this RFI.
"Archive"	1. Materials created or received by a person, family, or organization, public or private, in the conduct of their affairs and preserved because of the enduring value contained in the information they contain or as evidence of the functions and responsibilities of their creator, especially those materials maintained using the principles of provenance, original order, and collective control; permanent records. – 2. The division within an organization responsible for maintaining the organization's records of enduring value. – 3. An organization that collects the records of individuals, families, or other organizations; a collecting archives.
"Collection"	(1) An artificial accumulation of materials devoted to a single theme, person, event, or type of document acquired from a variety of sources. (2) In a manuscript repository, a body of historical materials relating to an individual, family, or organization.
"Description"	The process of analyzing, organizing, and recording details about the formal elements of a record or collection of records, such as creator, title, dates, extent, and contents, to facilitate the work's identification, management, and understanding.
"EAC"	**Encoded Archival Context** is an XML-based standard used to mark up (encode) information about the creators of archival materials and the circumstances of record creation and use. It can be used in conjunction with Encoded Archival Description (EAD) for enhancement of EAD's capabilities in encoding finding aids, but can also be used in conjunction with other standards or for standalone authority file encoding. EAC elements reflect the ISAAR(CPF) standard and the ISAD(G), two standards managed by the International Council on Archives
"EAD"	**Encoded Archival Description** is an XML-based standard used to mark up (encode) finding aids that reflects the hierarchical nature of archival records and collections and that provides a structure for describing

the whole of a record or collection, as well as its components. Based on ISAD(G).

"EAG"	**Encoded Archival Guide** is an XML-based standard used to mark up (encode)) information about the Institutions that holding archival material.
"IAN"	**Israel Archives Network**
"ICA"	**International Council on Archives**. An international organization of state, public, and private archives and individual archivists that promotes the preservation of the archival heritage in all countries and provides opportunities to share knowledge of archival and records management practices.
"ISAAR (CPF)"	A **standard** published by the ICA to establish controls for the creation and use of access points in archival descriptions and to identify the kinds of information that should be used to describe a corporate body, person, or family.
"ISAD(G)"	A **standard** published by the ICA that establishes general rules for the description of archival materials, regardless of format, to promote consistent and sufficient descriptions, and to facilitate exchange and integration of those descriptions.
"ISDF"	A **standard** published by the ICA that establishes general rules describing functions.
"ISDIAH"	The ICA's International Standard for Describing Institutions with Archival Holdings. The standard describes how to add, edit, and delete archival institutions.
"LDAP"	**Lightweight Directory Access Protocol**. An application protocol for accessing and maintaining distributed directory information services over an IP network.
"MADS"	**Metadata Authority Description Standard**. MADS is a MARC21-compatible XML format for the type of data carried in the MARC 21 Authority format.
"MARC"	**Machine-Readable Cataloging**. A data communications format that specifies a data structure

for bibliographic description, authority, classification, community information, and holdings data.

"METS" **Metadata Encoding and Transmission Standard**. An XML schema used to package digital objects, along with descriptive, administrative, and structural metadata.

"MODS" **Metadata Object Description Schema**. An XML-based bibliographic description schema designed as a compromise between the complexity of the MARC format used by libraries and the extreme simplicity of Dublin Core metadata.

"NLI" **The National Library of Israel**

"OAIS" **Open Archives Information System**
An ISO standard reference model for digital archives.

"OAIS-PMH" Protocol for metadata harvesting.

"OCR" **Optical Character Recognition**

"Record" Data or information in a fixed form that is created or received in the course of individual or institutional activity and set aside (preserved) as evidence of that activity for future reference.

"Requesting Parties" The IAN Project management as defined herein.

"RFI" **Request for Information** (**RFI**) is a standard business process whose purpose is to collect written information about the capabilities of various suppliers.

"RFP" A **request for proposal** (**RFP**) is issued during a procurement process, where an invitation is presented for suppliers, often through a bidding process, to submit a proposal on a specific commodity or service.

"Selection Procedure": The entire procedure conducted by the requesting parties to collect information about the available solutions as set out in this RFI.

"Surrogate" Copy or replacement of the original.

2   Purpose of the RFI

The IAN Project is publishing this RFI for the purpose of gathering information on the capabilities of available solutions and compiling a shortlist of prospective vendors for the provision of an AMS for the purposes listed above. The same information will be gathered from different companies and will be used to evaluate which suppliers we may follow up with in the sourcing process with an RFP. This RFI will in no way limit or otherwise bind the IAN Project to the vendors who have replied to the RFI and does not constitute any undertaking by any of the project participants referred to herein.

2.1   Language

This RFI was written and will be published in English so that a maximum number of solution providers from Israel and around the world can read and respond to the RFI.

3   Administrative Requirements

3.1   Legal Provisions

By agreeing to receive and/or by responding to this RFI, each Applicant accepts and undertakes to comply with the following terms and conditions:

3.1.1   Non-Committal

Nothing in this RFI, nor any communication made by the IAN Project, State Archives, or National Library of Israel, or the agents, employees or advisers thereof shall constitute an offer of a contract or a binding contract between the requesting parties and any prospective Applicant, nor shall it be taken as constituting any representation that rights or licenses will be granted in accordance with this RFI. The RFI may form the basis for a future and separate RFP tendering process between the IAN Project and the Applicant for the supply and implementation of the AMS System as set out in the RFI document.

3.1.2   Confidentiality

All information received in this RFI will be kept confidential and only for the knowledge of the requesting parties and purposes of this RFI.

3.1.3   Liability for Errors

While the IAN Project has made considerable effort to ensure an accurate representation of information in this Request for Information, the information contained in this Request for Information is supplied solely as a guideline for Proponents. The information is not guaranteed or warranted to be accurate by the requesting parties, nor is it necessarily comprehensive or exhaustive.

3.1.4   Modification of Terms

The requesting parties reserve the right to modify the terms of this Request for Information any time at its sole discretion. This includes the right to cancel this Request for Information at any time. Updates to the RFI will be published on the IAN Project website, the National Library of Israel Website – www.nli.org.il under "news", and on the website of the Israel State Archives - http://archives.gov.il/ArchiveGov.

3.1.5   Ownership of Proposal

All documents, including responses and proposals, submitted to the requesting parties become the property of the requesting parties. They will be received and held in confidence by the requesting parties.

3.2   RFI Response Instructions

To answer this RFI please fill in the attached form (Section 4.2, "Evaluation Criteria"). The contact person listed below is available for assistance if necessary.
An evaluation committee comprising representatives from the managing bodies of the Israel Archives Network Project will evaluate the answers to this RFI.

For each requirement, you are requested to fill out the Response and Explanation columns. Each requirement is followed by a detailed explanation in smaller print.

Response Column:
Answer **"Fully Supported"** if your solution FULLY meets the requirement "out of the box" with no further development and/or customization necessary.

Answer **"Partially Supported"** if your solution PARTIALLY meets the requirement and/or some further development and/or customization may be necessary to meet the requirement. Please state how many man days of work are required in order to fully complete this feature. (See Appendix 1 below).

Answer **"Not Supported"** if your solution DOES NOT currently meet the requirement and/or it must be fully developed. Please state how many man days of work are required in order to fully complete this feature if you intend or are otherwise considering adding this feature. (See Appendix 1 below).

Answer **"3ʳᵈ Party Supported"** if your solution DOES NOT currently meet the requirement however a 3ʳᵈ party has successfully developed and implemented a solution for the requirement and it works successfully with your solution.

NOTE: The responses must reflect the <u>current status</u> and features of your product. If your solution does not currently meet the requirement but will do so in the future, please describe the future planned development in the response field.

Details Column: For each requirement, please provide a FULL and DETAILED explanation on how your solution meets or exceeds the requirement. You may include charts and illustrations where necessary.

A requirement left blank will be evaluated as "NOT SUPPORTED".

At the end of each section there are two blank fields "Additional Features" and "Additional Comments". Any additional features or comments that the solution provider may wish to describe should be entered here.

3.2.1   Response Submittal
Send the attached form in word-format (format unchanged) by email to chezkiek@nli.org.il by the last date for submission (see)

3.2.2   Contacts
For questions regarding this RFI, you are welcome to contact:

> Chezkie Kasnett
> Project Manager - Israel Archive Network
> Information Technology Division
> The National Library of Israel
> Tel: +9722-658-5022
> Cell: +972-54-882-0991
> e-Mail: chezkiek@nli.org.il

3.2.3   Qualifications
This RFI has been designed to gather information from companies with: (a) extensive proven experience in providing the software solution and working with archival organizations; (b) extensive knowledge and understanding of archival standards and practices; (c) a strong financial background; (d) sufficient financial and human resources to provide the solution; (e) solid experience and a state-of-the-art information technology infrastructure.

3.3   Project Process
The evaluation committee will check RFI responses against the mandatory criteria. A short list of vendors will be compiled based on a score determined by the RFI response. Proposals not meeting all mandatory criteria will be rejected without further consideration. Proposals that do meet all the mandatory criteria will then be

assessed and scored against the desirable criteria. Notification of acceptance or rejection will be sent to each vendor separately. The IAN Project reserves the right to send the RFP to selected vendors in its sole and full discretion which may include vendors that did not participate in the RFI process.

3.3.1 Timeframe

The following timetable outlines the anticipated schedule for the RFI and Contract process. The timing and the sequence of events resulting from this RFI may vary and shall be determined by the requesting parties and the IAN Project.

EVENT	ANTICIPATED DATE (dd/mm/yyyy)
RFI Published	27/11/2011
Last date for submission of answer	29/12/2011
Vendor shortlist compiled	01/02/2012
Notification to vendors	15/02/2012
RFP	15/03/2012
Last date for submission of Proposal	16/04/2012
Vendor Selection	03/06/2012
Project Start	18/06/2012

4 Requirements for the Israel Archives Network Project

4.1 General Solution Requirements

The requirements listed in this section outline the basic requirements that the solution will be expected to meet. A more detailed list of the individual requirements with a response form appears in Section 4.2 of this RFI.

- Conform with OAIS

- Multi-lingual

- Support the management of many archives in a hosted environment by the technical management team of the project. The project is expected to potentially host up to 500 archival institutions.

- Support the ability to create and maintain an accessible preservation or "backup" data source of the data of all the archives in the System. This data source must be accessible directly without the need for proprietary software.

- Support a huge amount of data consisting of archive records. The System will include data (and possibly the digital collections) from approximately 500 heritage archives nationwide, including archives that will manage

their archive and collections within the System and archives with their own systems who will submit their records to the IAN System.

▪ Support "active" archives. Many of the archives are live which means they continually accept new material and update their catalogues. The System will support the ability to constantly add, edit, and maintain records as well as receive EAD data imports of new and updated records.

▪ The System will be highly scalable to allow for the easy addition of new archives to the project without compromising performance and cost.

▪ Support the management of, or integrate with a 3rd party digital preservation system, that will contain all of the digital surrogates of the records in the Archive Management System.

▪ Each participating archive institution will be able to manage its archive and collections within the System. The system will support the creation and management of records on an item level with full hierarchical inheritance.

▪ Allow each individual archive to fully manage its collections and records as detailed in the RFI requirements below remotely.

▪ Allow archives that already have an AMS to export their records to the IAN System. The System will import this data seamlessly in an automatic or semi-automatic fashion. The data export will be in an XML format in accordance with a pre-defined EAD or EAG. The System will import the EAD in an XML format.

▪ The System will support mechanisms for restricting selected records and digital images from public access according to accepted standards.

▪ The AMS system will conform to internationally accepted standards of archival management including, but not limited to, ISAD(G), ISAAR(CPF), ISDF, and ISDIAH.

▪ The IAN project will serve academics, researchers, and the general public in Israel and abroad. The collections data held within the system will be made wholly or partially available to the public via a Web interface. The System will support a front-end Internet Gateway that will allow the end-user to search for information within a specific archive or across all of the archives in the System (federated search). The System will be able to display multiple results that meet the search criteria from across all the

archives collections and display them in an organized, user-friendly fashion to the end user, showing clearly the record source and the existence and location of duplicate search results.

▪ Support "crowdsourcing". The System will allow individuals ("contributors") (volunteers, and hired help) to participate in cataloging the archive material. Contributors will be able to access the digital images of items held within an archive's collections and add descriptive metadata to the record. The System will support contributor management including user management and access rights (including existing LDAP), approval and rejection and publishing of their content, and updating the AMS database.

▪ Support Web 2.0 functionality. The front-end Internet portal will be a forward-looking interface meant to serve a large cross section of global society. The System will be required to interact with social media platforms and is intended to incorporate semantic web and/or advanced linguistic tools.

▪ The System will support backup and restore functionality of the system and its data via a built-in or third party application.

▪ Reporting – The system will provide reports:
   o On the individual archive level for use by each archive
   o On the system administrator level providing data regarding the number of archives in the system, the number of objects, users, use of the system by each archive.

Figure 1 provides a high-level schematic showing the general scope of the IAN project.

NOTE: (The below schematic represents a basic architecture of the desired overall solution. The schematic is subject to change. Feel free to suggest improvements and alternative solutions).
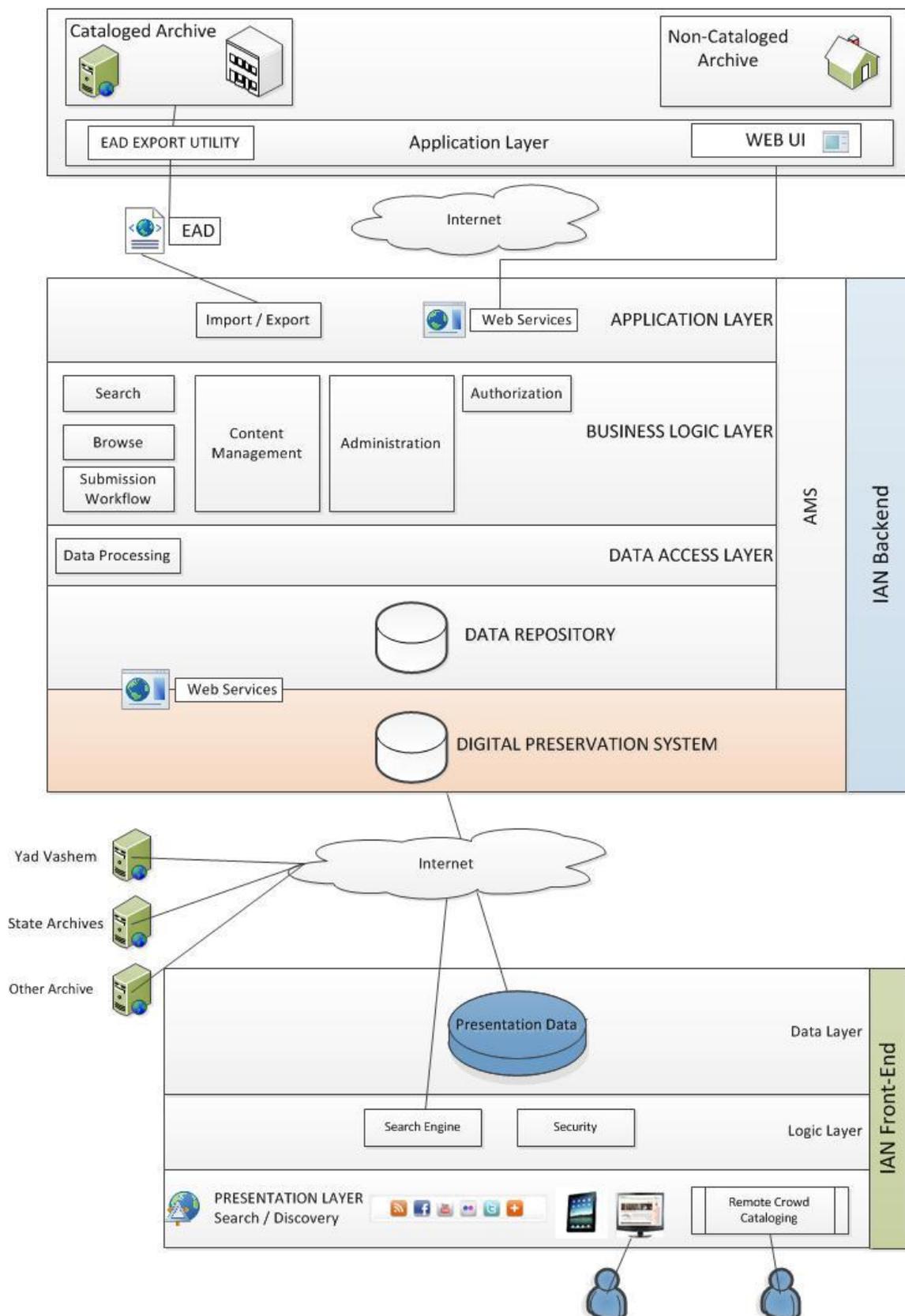
Figure 1

4.2 Technical Requirements - Evaluation Criteria

4.2.1 Part 1 – Company Information

Item	Details
Company name	Click here to enter text.
Company address	Click here to enter text.
Company website	Click here to enter text.
Main products/services	Click here to enter text.
Main market/customers	Click here to enter text.
Ownership structure with ownership status in percentage	Click here to enter text.
Structure of mother corporation, joint ventures, subsidiaries, partnerships or other relevant relations	Click here to enter text.
Number of years on the market	Click here to enter text.
Company location(s)	Click here to enter text.
Describe your business continuity management	Click here to enter text.
Employees	Click here to enter text.
Professional Services	Click here to enter text.
R&D	Click here to enter text.
Marketing and sales	Click here to enter text.
Technical Support	Click here to enter text.
Financial information	Click here to enter text.
Previous year turnover	Click here to enter text.
Previous year gross margin	Click here to enter text.
Previous year profit	Click here to enter text.
Contact person and responsible for answering this RFI	Click here to enter text.
Position of contact person	Click here to enter text.
Telephone	Click here to enter text.

Email	Click here to enter text.
Cellphone	Click here to enter text.

4.2.2   Part 2 – Hardware and Software Requirements

Item	Response
Name of Solution/Product that pertains to the RFI	Click here to enter text.
Product/Solution Description	Click here to enter text.
Number of customers using the solution	Click here to enter text.
Solution developed by	Click here to enter text.
License Type	Click here to enter text.
Purchasing cost model	Click here to enter text.
System Requirements (OS, Software, Hardware)	Click here to enter text.
What technologies does the solution use?	Click here to enter text.
Database (default/ supported)	Click here to enter text.
Technical Architecture	Click here to enter text.
64-bit OS support	Click here to enter text.
Windows 2008 Server support	Click here to enter text.
VM Support	Click here to enter text.
Solution Hosting	Click here to enter text.
Demo/Sandbox Available?	Click here to enter text.
Is the software is designed specifically for Archives?	Click here to enter text.
Please include a list of current customer references (including contact information)	Click here to enter text.
In what encoding is input text stored (such as UTF-8)	Click here to enter text.
Is the software multilingual (including support for right-to-left languages i.e. Hebrew, Arabic)	Click here to enter text.
Is the software available in Israel	Click here to enter text.
Frequency of major version releases	Click here to enter text.

Frequency of minor releases (bug fixes)	Click here to enter text.
Are bug fixes and feature developments included for all customers in each version of the software?	Click here to enter text.
Customization flexibility – how customizable is the solution. (Please describe)	Click here to enter text.
Solution Scalability How scalable is the solution? (in terms of hardware, software, how many records and institutions can be added)	Click here to enter text.
Source code escrow (Is your company willing to commit the software source code to an escrow)	Click here to enter text.
Customer Support and Training	
Support in Hebrew is available in Israel	Click here to enter text.
Customer support forum	Click here to enter text.
Help manual in Hebrew, English	Click here to enter text.
SLA – Please describe your levels of SLA	Click here to enter text.
Technical Documentation	Click here to enter text.
Customer support methods and availability (phone hotline, web chat, email, remote support access, etc…)	Click here to enter text.

4.2.3 Part 3 – General Requirements

Requirement	Response	Details
Support the ability to create and maintain an accessible preservation or "backup" data source of the data of all the archives in the System. This data source must be accessible directly without the need for proprietary software.	Choose an item.	Click here to enter text.
Support a huge amount of data The system will support the records of (and possibly the digital collections) potentially 500 archives	Choose an item.	Click here to enter text.
Support "active" archives Archives that continue to accept new material	Choose an item.	Click here to enter text.
Highly scalable to allow for the easy addition of new archives to the project without compromising performance and cost.	Choose an item.	Click here to enter text.
Includes a digital preservation / records management system or supports integration with	Choose an item.	Click here to enter text.

a 3rd party system.		
Allow each individual archive to fully manage its collections and records as detailed in the RFI requirements below <u>remotely.</u>	Choose an item.	Click here to enter text.
Allow archives that already have an AMS to export their records to the IAN System. The System will import this data seamlessly in an automatic or semi-automatic fashion.	Choose an item.	Click here to enter text.
Support mechanisms for restricting selected records and digital images from public access according to accepted standards.	Choose an item.	Click here to enter text.
Does the system include a Front-End Web interface for use by the public for accessing the content? If not, how does the system integrate with a front-end system?	Choose an item.	Click here to enter text.
Support "crowdsourcing". The System will allow individuals from the general public("contributors") (volunteers, and hired help) to participate in cataloging the archive material.	Choose an item.	Click here to enter text.
Web 2.0 / Web 3.0 support. (Semantic Web, Social media platofrms)	Choose an item.	Click here to enter text.
Built-in backup and restore capability	Choose an item.	Click here to enter text.
Administrator reports – on 2 levels 1. Top level – reports on all archives , users in the system 2. Administrator reports on the individual archive level	Choose an item.	Click here to enter text.

4.2.4   Part 4 –Archive Level Backend - Catalog/Data

Requirement	Response	Details
Collection Management/Accession Features		
Accessions Acquiring collections or parts of collections and documenting the transfer of material. Basic information about the collection, such as: date of receipt, accession number, donor information, collection size, monetary value, method of accession (transfer, donation, loan, or purchase)	Choose an item.	Click here to enter text.
Record or generate deed of gift Documents legal transfer of title of the collection to the recipient. Usually a letter or document	Choose an item.	Click here to enter text.

Prioritize Processing Order (of recording accessions)	Choose an item.	Click here to enter text.
Create description record (from accession record and automatically populate fields)	Choose an item.	Click here to enter text.
Link accession and description records	Choose an item.	Click here to enter text.
Link accession record to multiple description records	Choose an item.	Click here to enter text.
Link description record to multiple accession records	Choose an item.	Click here to enter text.
Record Physical Condition of collection / item	Choose an item.	Click here to enter text.
Record Conservation/Restoration Treatment on collection/item level	Choose an item.	Click here to enter text.
Manage Physical Locations (storage facility, shelf, cabinet, drawer)	Choose an item.	Click here to enter text.
Integration with Archive Storage (warehouse) software	Choose an item.	Click here to enter text.
Manage Access Rights / Copyright Access to Restricted Materials Define if material can be publicly viewed (on both collection, group, and record level)	Choose an item.	Click here to enter text.
De-Accessioning (Manage removing, selling, trading of collections or parts of collections from the archive)	Choose an item.	Click here to enter text.
Support management of non-archive collections	Choose an item.	Click here to enter text.
Loans and Exhibits		
Module to manage Loans & Exhibits	Choose an item.	Click here to enter text.
Prevent double orders (prevent an order for an item that is presently on loan or unavailable)	Choose an item.	Click here to enter text.
View history of loans and exhibits of a collection/item (on any level of the hierarchy)	Choose an item.	Click here to enter text.
Alerts for upcoming events (such as an item due for return)	Choose an item.	Click here to enter text.
Resource Description		
Authority Control In accordance with archival standards: ISAAR(CPF)	Choose an item.	Click here to enter text.
Archival Description In accordance with archival standards: ISAD(G)	Choose an item.	Click here to enter text.
Controlled vocabulary predefined list of words and phrases, which are used to tag units of information so that they may be more easily retrieved by a search or browsing.	Choose an item.	Click here to enter text.

Data Validation	Choose an item.	Click here to enter text.
Templating/ Default Fields	Choose an item.	Click here to enter text.
Multi language capability of data entry Hebrew (inc. right-to-left screen and field orientation) English Arabic (inc. right-to-left screen and field orientation) French Russian German/Yiddish	Choose an item.	Click here to enter text.
Ability to input multiple languages in a single field	Choose an item.	Click here to enter text.
Spell check In all languages listed above	Choose an item.	Click here to enter text.
Support for various types of date formats	Choose an item.	Click here to enter text.
Support date ranges	Choose an item.	Click here to enter text.
Item-level Description Supports unique description data on lowest level of hierarchy	Choose an item.	Click here to enter text.

Supports Hierarchical Cataloging
 	
Of <u>at least</u> 10 levels:
 	
(example hierarchy)
Institution
    Archive
        Fonds/Collection/Record Group
          Sub-Fonds
            Series
              Sub-Series
                Folder
                  Document/item
 	
Is the depth of hierarchy limitless and if not until what hierarchy depth does the software support?
	Choose an item.	Click here to enter text.

Customizable Hierarchy Ability to add/delete fields on each hierarchy level and name them as desired	Choose an item.	Click here to enter text.
Ability to reorganize hierarchies	Choose an item.	Click here to enter text.
Support different hierarchy depths across different archives or different fonds within the archive	Choose an item.	Click here to enter text.
Control of field properties on each hierarchy level	Choose an item.	Click here to enter text.
Automatic inheritance to child levels on record creation	Choose an item.	Click here to enter text.
Change on parent level automatically updates all child levels	Choose an item.	Click here to enter text.

Allow text fields of unlimited length	Choose an item.	Click here to enter text.
Dynamically generate EAD	Choose an item.	Click here to enter text.
Batch modify records	Choose an item.	Click here to enter text.
Batch delete records	Choose an item.	Click here to enter text.
Publish finding aids online	Choose an item.	Click here to enter text.
Barcode Support	Choose an item.	Click here to enter text.
Digital Material		
Support for Digital Media information/metadata on record	Choose an item.	Click here to enter text.
Support "born digital" material in various formats	Choose an item.	Click here to enter text.
Support digitization workflows (automated linking of records to digital surrogates, barcode)	Choose an item.	Click here to enter text.
Link /Save digital surrogates to record	Choose an item.	Click here to enter text.
Support multiple digital surrogates for each record	Choose an item.	Click here to enter text.
Add digital signatures and watermarks	Choose an item.	Click here to enter text.
Integration/Interoperability		
Integration with other platforms	Choose an item.	Click here to enter text.
Interoperability with Digital Repository Systems	Choose an item.	Click here to enter text.
Interoperability with Exlibris Rosetta	Choose an item.	Click here to enter text.
Interoperability with Exlibris Digitool	Choose an item.	Click here to enter text.
Interoperability with Exlibris Aleph	Choose an item.	Click here to enter text.
Interoperability with Exlibris Primo	Choose an item.	Click here to enter text.
Integration with lexicons, vocabularies and thesauri	Choose an item.	Click here to enter text.
Compliance with Archival Standards		
ISDIAH	Choose an item.	Click here to enter text.
ISAD(G)	Choose an item.	Click here to enter text.
EAD	Choose an item.	Click here to enter text.
EAC	Choose an item.	Click here to enter text.
EAG	Choose an item.	Click here to enter text.

ISDF	Choose an item.	Click here to enter text.
ISAAR(CPF)	Choose an item.	Click here to enter text.
Compliance with Meta Data Standards		
MARC	Choose an item.	Click here to enter text.
METS	Choose an item.	Click here to enter text.
MODS	Choose an item.	Click here to enter text.
ALTO	Choose an item.	Click here to enter text.
Dublin Core	Choose an item.	Click here to enter text.
Metadata Import/Export (in terms of ability to import/export on archive and collection level)		
Exports MARC	Choose an item.	Click here to enter text.
Exports EAD	Choose an item.	Click here to enter text.
Exports Dublin Core	Choose an item.	Click here to enter text.
Exports MODS	Choose an item.	Click here to enter text.
Exports METS	Choose an item.	Click here to enter text.
Exports MADS	Choose an item.	Click here to enter text.
Export in XML	Choose an item.	Click here to enter text.
Export CSV	Choose an item.	Click here to enter text.
Export Excel	Choose an item.	Click here to enter text.
Batch Exports EAD	Choose an item.	Click here to enter text.
Batch Exports MARC	Choose an item.	Click here to enter text.
Batch Export in XML	Choose an item.	Click here to enter text.
Batch Export Tab Delimited Files/CSV	Choose an item.	Click here to enter text.
Batch Export Excel	Choose an item.	Click here to enter text.
Imports XML	Choose an item.	Click here to enter text.
Imports EAD	Choose an item.	Click here to enter text.
Imports EAG	Choose an item.	Click here to enter text.
Imports EAC	Choose an item.	Click here to enter text.

Imports MARC	Choose an item.	Click here to enter text.
Imports Tab Delimited Files/ CSV	Choose an item.	Click here to enter text.
Import Excel	Choose an item.	Click here to enter text.
Imports Digital Image Files	Choose an item.	Click here to enter text.
Import Accession Data	Choose an item.	Click here to enter text.
Batch import of XML	Choose an item.	Click here to enter text.
Batch Import EAD	Choose an item.	Click here to enter text.
Batch Import EAG	Choose an item.	Click here to enter text.
Batch Import EAC	Choose an item.	Click here to enter text.
Batch Import MARC	Choose an item.	Click here to enter text.
Batch Import CSV	Choose an item.	Click here to enter text.
Batch Import Excel	Choose an item.	Click here to enter text.
DATA PRESERVATION		
Active Preservation How is the system designed to handle the long-term preservation of data, dealing with changes in technology, formats, workflows.	Choose an item.	Click here to enter text.
Other		
Additional features	Click here to enter text.	
Additional comments	Click here to enter text.	

4.2.5 Part 5 –Archive Level Administration

Individual Archive Level Administrative Functions		
Administration Interface	Choose an item.	Click here to enter text.
User Permissions – for users (such as internal users, archivists, external users)	Choose an item.	Click here to enter text.
Control access permissions to records with user profiles	Choose an item.	Click here to enter text.
Record and maintain usage data of archival users	Choose an item.	Click here to enter text.
Record and maintain usage data of archive material access history.	Choose an item.	Click here to enter text.
Ability to link between archive users and archive material access history	Choose an item.	Click here to enter text.
Ability to define (on/off) fields as searchable by the search engine	Choose an item.	Click here to enter text.
Support for Harvesting	Choose an item.	Click here to enter text.
Support for Syndication Data from the system is made available to other sites via web feed or individual subscribers (for harvesting by others)	Choose an item.	Click here to enter text.
Synchronization with other cataloging systems (support for OAIS-PMH)	Choose an item.	Click here to enter text.
Customization/ Configuration of the user interfaces, fields, functionality	Choose an item.	Click here to enter text.
Audit trail of data changes	Choose an item.	Click here to enter text.
Bug Reporting	Choose an item.	Click here to enter text.
Logs – bugs, warnings, (does the system support clean/deleting logs?)	Choose an item.	Click here to enter text.
Reports		
Reports and usage statistics Print/save/email	Choose an item.	Click here to enter text.
Reports: List all built-in reports available	Choose an item.	Click here to enter text.
Produce list of all or partial archive holdings based on numerous selectable criteria, with ability to select the fields to be displayed in the report. (Please note any limitations such as number of fields or reported items)	Choose an item.	Click here to enter text.
Customizable reports Can user-defined/customized reports be created ?	Choose an item.	Click here to enter text.
Can customized reports be created by the user or IT staff or do they require the supplier to create them?	Choose an item.	Click here to enter text.

Other	
Additional features	Click here to enter text.
Additional comments	Click here to enter text.

4.2.6   Part 6 – Archive Level - Archivist Front-End

User Access		
Allow offline data entry	Choose an item.	Click here to enter text.
Authorization levels for system access	Choose an item.	Click here to enter text.
Remote Data Entry		
Allows for external users to connect to backend system and insert/retrieve records information	Choose an item.	Click here to enter text.
Data Entry Approval Process Allow for proofing /approval /publish/reject of new records from external users	Choose an item.	Click here to enter text.
User Interface		
User interface is: Web Interface / Client / Application. (Please describe the UI technology)	Choose an item.	Click here to enter text.
Built-in Help (user manual, online help, field and functionality help lookup)	Choose an item.	Click here to enter text.
Customizable UI	Choose an item.	Click here to enter text.
Multi-Language – Individual user can select desired interface language (Hebrew, English, Arabic, French, German, Russian). The interface switches to right-to-left for right-to-left languages.	Choose an item.	Click here to enter text.
Reports		
Reports Usage reports, usage statistics – of the user	Choose an item.	Click here to enter text.
Print reports	Choose an item.	Click here to enter text.
Save Reports	Choose an item.	Click here to enter text.
Email reports	Choose an item.	Click here to enter text.
Print Records	Choose an item.	Click here to enter text.
Other		

Additional features	Click here to enter text.
Additional comments	Click here to enter text.

4.2.7   Part 7 – Project/Solution Level System Administration

System Administration		
Module for the management of many archives in a hosted environment by the technical management team of the project	Choose an item.	Click here to enter text.
Administration Interface Does the solution have an administration interface for management of hosted archives. Add/edit/delete an archive	Choose an item.	Click here to enter text.
User administration Manage system administrators, (add, edit, remove)	Choose an item.	Click here to enter text.
Web Interface / Client / Application / Mobile Devices of administration interface	Choose an item.	Click here to enter text.
Define system-wide workflows A single workflow for many archives	Choose an item.	Click here to enter text.
Ability to customize workflows – without requiring additional development or vendor support. Required on a per-archive basis. However different workflows can be defined for different archives in the system, and a workflow can be defined and then used for a number of different archives in the system.	Choose an item.	Click here to enter text.
Audit trail of data changes	Choose an item.	Click here to enter text.
System checks for data corruption and damaged or missing files	Choose an item.	Click here to enter text.
Reports		
Reports Usage Statistics, activity reports, system logs If out-of-the-box, please define	Choose an item.	Click here to enter text.
Customized Reports Ability to custom create reports	Choose an item.	Click here to enter text.
Customized reports by the project staff or the supplier?	Choose an item.	Click here to enter text.
Print Reports	Choose an item.	Click here to enter text.
Save Reports	Choose an item.	Click here to enter text.
E-mail Reports	Choose an item.	Click here to enter text.

Other	
Additional features	Click here to enter text.
Additional comments	Click here to enter text.

4.2.8   Part 8 – Front-End Infrastructure for Accessibility

Does your system have a Front-end Web interface for presentation of the archive material to the public?	Choose an item.	Click here to enter text.
How does your solution integrate with a 3rd party developed front-end?	Choose an item.	Click here to enter text.
Discoverable by external (commercial) search providers (Google, etc…)	Choose an item.	Click here to enter text.
Do you supply an API?	Choose an item.	Click here to enter text.
Do you supply an SDK?	Choose an item.	Click here to enter text.
Supported Browsers and versions	Choose an item.	Click here to enter text.
Support 3rd party digital viewers and players without the need to install on the client side (MP3,WAV,JPEG,TIFF,JPEG2K,PDF)	Choose an item.	Click here to enter text.
Multimedia support	Choose an item.	Click here to enter text.
Integration with social media platforms	Choose an item.	Click here to enter text.
Support and manage interaction with public users including feedback, orders, questions, requests.	Choose an item.	Click here to enter text.
Ability to order an item(s) from the catalog	Choose an item.	Click here to enter text.
Ability to create, edit, e-mail, share, and save a search list of items.	Choose an item.	Click here to enter text.
Display thumbnail images and larger high-resolution images	Choose an item.	Click here to enter text.
Prevent unauthorized copying/downloading of digital material	Choose an item.	Click here to enter text.
Search / Information Retrieval		
Search Engine - Does the solution include a search engine? Which search engine does the system use? (in-house or 3rd party?)	Choose an item.	Click here to enter text.
Search types /interface Basic/advanced search – describe the search options and	Choose an item.	Click here to enter text.

depth of search		
Search on date ranges (from year to year)	Choose an item.	Click here to enter text.
Browse feature	Choose an item.	Click here to enter text.
Search on fields and/or keywords –globally on all fields and levels of hierarchy	Choose an item.	Click here to enter text.
Refine search based on hierarchy, type of item, collection, archive	Choose an item.	Click here to enter text.
Create search query from keywords and phrases from keywords table	Choose an item.	Click here to enter text.
Search results clearly indicate hierarchical relationships of records	Choose an item.	Click here to enter text.
Search result clearly indicates location of record within hierarchy	Choose an item.	Click here to enter text.
Ability to move up or down in the hierarchy without having to perform new search	Choose an item.	Click here to enter text.
Advanced Search Capability: Boolean operators, Fuzzy search, stemming, morphology, Phrase search, proximity search, phonetic search, wildcard search Across fields and values	Choose an item.	Click here to enter text.
Federated Search	Choose an item.	Click here to enter text.
Support search on OCR of digital images	Choose an item.	Click here to enter text.
Keywords / stop-words lists	Choose an item.	Click here to enter text.
Multi language thesaurus / keywords tables	Choose an item.	Click here to enter text.
Search Results		
Ability for user to sort search results based on selectable parameters (date, name, size, relevancy, collection, archive)	Choose an item.	Click here to enter text.
Search Result ranking by relevancy, date, record type, can the ranking be set by the user according to customizable parameters?	Choose an item.	Click here to enter text.
Display search query with search results	Choose an item.	Click here to enter text.
Highlight search query in search results	Choose an item.	Click here to enter text.
Print, export, save, email search results	Choose an item.	Click here to enter text.
Search results can link to images & other files	Choose an item.	Click here to enter text.
Easy navigation between search results, search items and back to search results	Choose an item.	Click here to enter text.
Other		

Additional features	Click here to enter text.
Additional comments	Click here to enter text.

4.2.9 Part 9 – Cost Structure

Please provide a price list or pricing structure of your solution. (You may include this as a separate attachment to this RFI)	Click here to enter text.

4.2.10 Part 10 – Past Projects and References

Please describe at least three previous successful projects.	Click here to enter text.
Please describe at least one previous successful project that is similar in scope and requirements to the stated project.	Click here to enter text.
Please list at least three references (name, organization, and contact information) that we may contact about your product and/or about previous projects.	Click here to enter text.

4.3 Appendices

4.3.1 Appendix 1 – Partially Supported or Non-Supported Requirements

For each requirement that is either "Not Supported" or "Partially Supported" Please state how many man days of work are required in order to fully complete this feature if you intend or are otherwise considering adding this feature. You may add any additional comments as necessary.

Feature	Work Required
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Click here to enter text.	Click here to enter text.
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4.3.2   Additional Comments

Please add any additional comments or notes that you wish to bring to the attention of the requesting parties here.

Click here to enter text.