



Collections Management Systems & Databases

Presented by Rachael Cristine Woody,
Rachael Cristine Consulting LLC



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Nice to Meet You!

- Business Owner, Author, Speaker, Educator, Advocate, and Consultant.
- 15 years in archives, museums, and cultural heritage organizations.
- Expert in collections management, digital collections, and collections management systems.



Today's Webinar

- The role of a museum Collections Management System (CMS)
- Standards to follow when using a museum CMS
- A proposed process when working with a Museum CMS
- The steps involved for procuring a museum CMS
- Examples of CMS platforms and their cost
- Resources required for effective collections management
- Closing resources and time for questions



Questions?



Please place your questions in the chat. They will be read out loud by the host at the end of each section and during the question period at the end.



The Role of a CMS

The Collections Management System (CMS) is the digital version of a card catalog or acquisition book. The CMS has evolved to effectively capture the initial and evolving item information; as well as take on the heavier lifting of exhibition planning and management, condition and conservation treatment reporting, item inventory and auditing, tracking incoming and outgoing loans, etc.



The Role of a CMS

The CMS is a tool that supports both the physical as well as intellectual management of collection items.



The Role of a CMS



Item Information Capture

- Acquisition
- Appraisal or valuation
- Basic catalog data
- Condition
- Description
- History and provenance
- Insurance
- Location
- Reference information
- Rights

The Role of a CMS



Item Management

- Accession
- Conservation
- Exhibition planning
- Loan management
- Inventory and auditing
- Movement and tracking
- Reproductions
- Reporting
- Deaccessioning

The Role of a CMS

Before item management is possible, item information must be known and documented. This is the role of the CMS, but can also be achieved with alternative methods of documentation. For example, using an excel spreadsheet to track object information.





Questions & Discussion



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Standards to Consult with CMS Work



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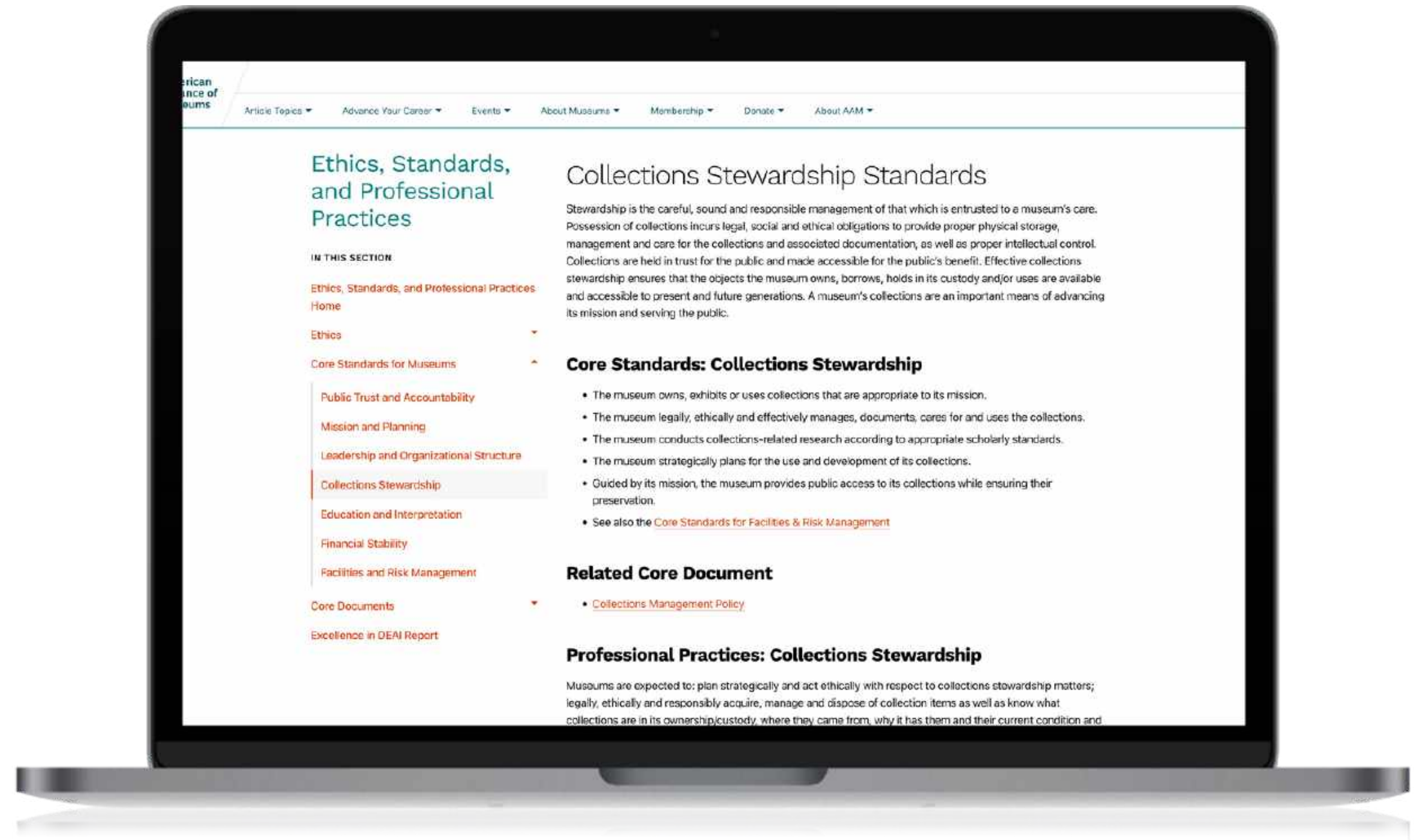
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Standards to Follow

- American Alliance of Museums' Collection Stewardship Standards
- Collection Trust's Spectrum
- National Park Service's Museum Handbook



Standards to Follow: American Alliance of Museums



Link: <https://www.aam-us.org/programs/ethics-standards-and-professional-practices/collections-stewardship-standards/>

Standards to Follow: American Alliance of Museums

Collections Stewardship

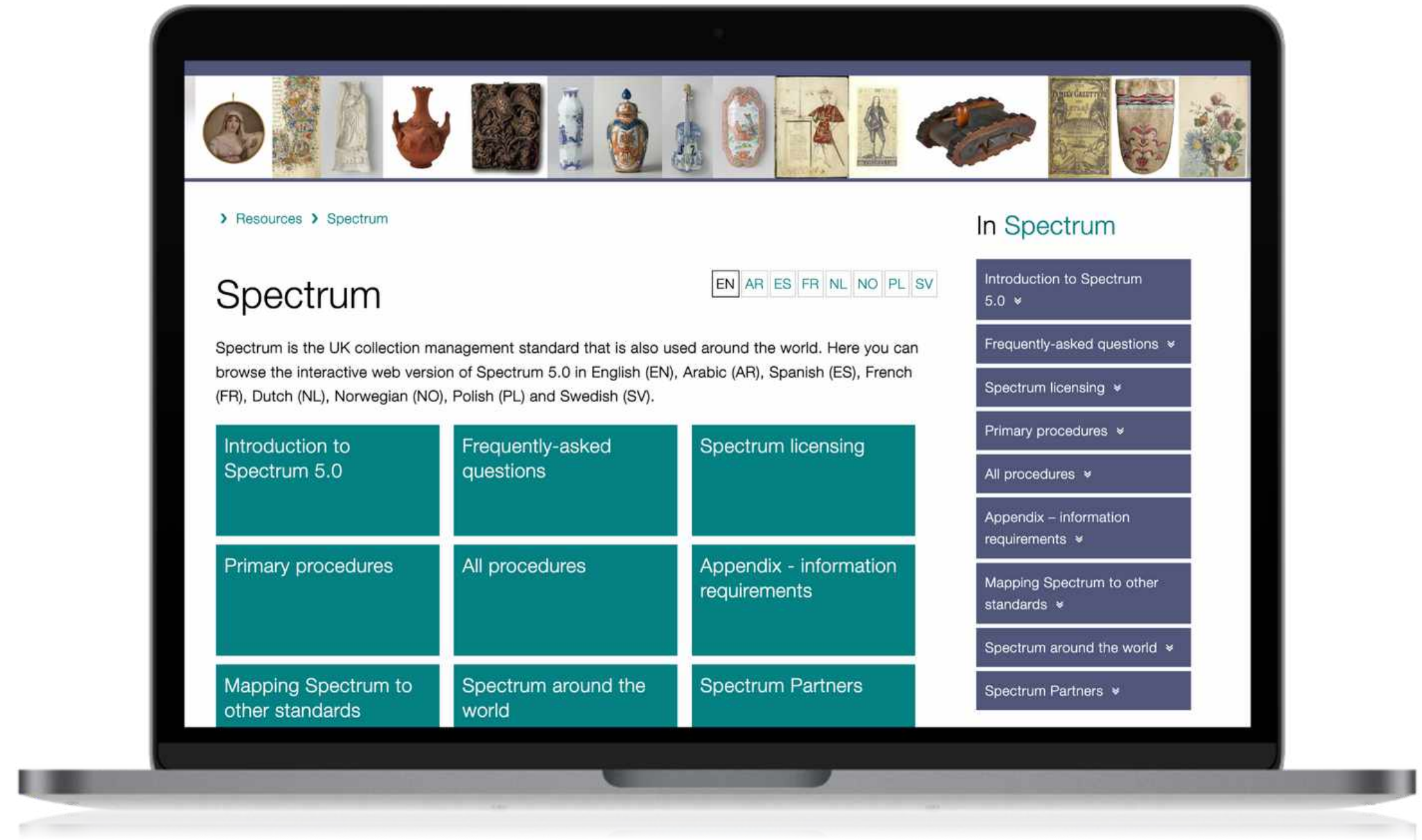
- Know what stuff you have
- Know what stuff you need
- Know where it is
- Take good care of it
- Make sure someone gets some good out of it
- Especially people you care about
- And your neighbors



To meet these a museum must have:

- A current, approved, comprehensive collections management policy is in effect and actively used to guide the museum's stewardship of its collections.
- The sufficient human resources and staff with the appropriate education, training and experience to fulfill the museum's stewardship responsibilities and the needs of the collections.
- Staff delegated with responsibility to carry out the collections management policy.
- A system of documentation, records management and inventory is in effect to describe each object and its acquisition (permanent or temporary), current condition and location and movement into, out of and within the museum.
- Processes that regularly monitor environmental conditions and have proactive measures to mitigate the effects of ultraviolet light, fluctuations in temperature and humidity, air pollution, damage, pests and natural disasters on collections.
- An appropriate method for identifying needs and determining priorities for conservation/care is in place.
- Safety and security procedures and plans for collections in the museum's custody are documented, practiced and addressed in the museum's emergency/disaster preparedness plan.
- Regular assessment of, and planning for, collection needs (development, conservation, risk management, etc.) takes place and sufficient financial and human resources are allocated for collections stewardship.
- Collections care policies and procedures for collections on exhibition, in storage, on loan and during travel are appropriate, adequate and documented.
- Both the physical and intellectual control of its property.
- Appropriate museum policies and procedures that incorporate ethical considerations of collections stewardship.
- Considerations regarding future collecting activities are incorporated into institutional plans and other appropriate policy documents.

Standards to Follow: Collections Trust's Spectrum



Link: <https://collectionstrust.org.uk/spectrum/>

Standards to Follow: National Park Service

The NPS Museum Handbook, Part II, Museum Records

It provides guidance on documentation and accountability for the

- Archeology
- Ethnography
- History
- Archival and manuscript collections
- Biology
- Geology
- Paleontology

It addresses the following topics:

- Accessioning
- Cataloging
- Inventorying
- Marking objects
- Record photography
- Incoming and outgoing loans
- Deaccessioning



Link: <https://www.nps.gov/museum/publications/handbook.html>

Required Fields to use in the CMS

(per NPS Museum Handbook)

- Accession Number (object number)
- Catalog Number (usually auto-assigned)
- Cataloger (usually assigned per login)
- Classification
- Condition
- Description
- Item Count
- Location
- Object Name
- Object Status



Common Vocabularies to Use

- Library of Congress Authority Headings
- Art and Architecture Thesaurus (AAT) from Getty Research Institute
- Cultural Objects Name Authority (CONA) from Getty Research Institute
- Nomenclature for Museum Cataloging created by Robert Chenhall





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The Proposed Process When Working with a CMS



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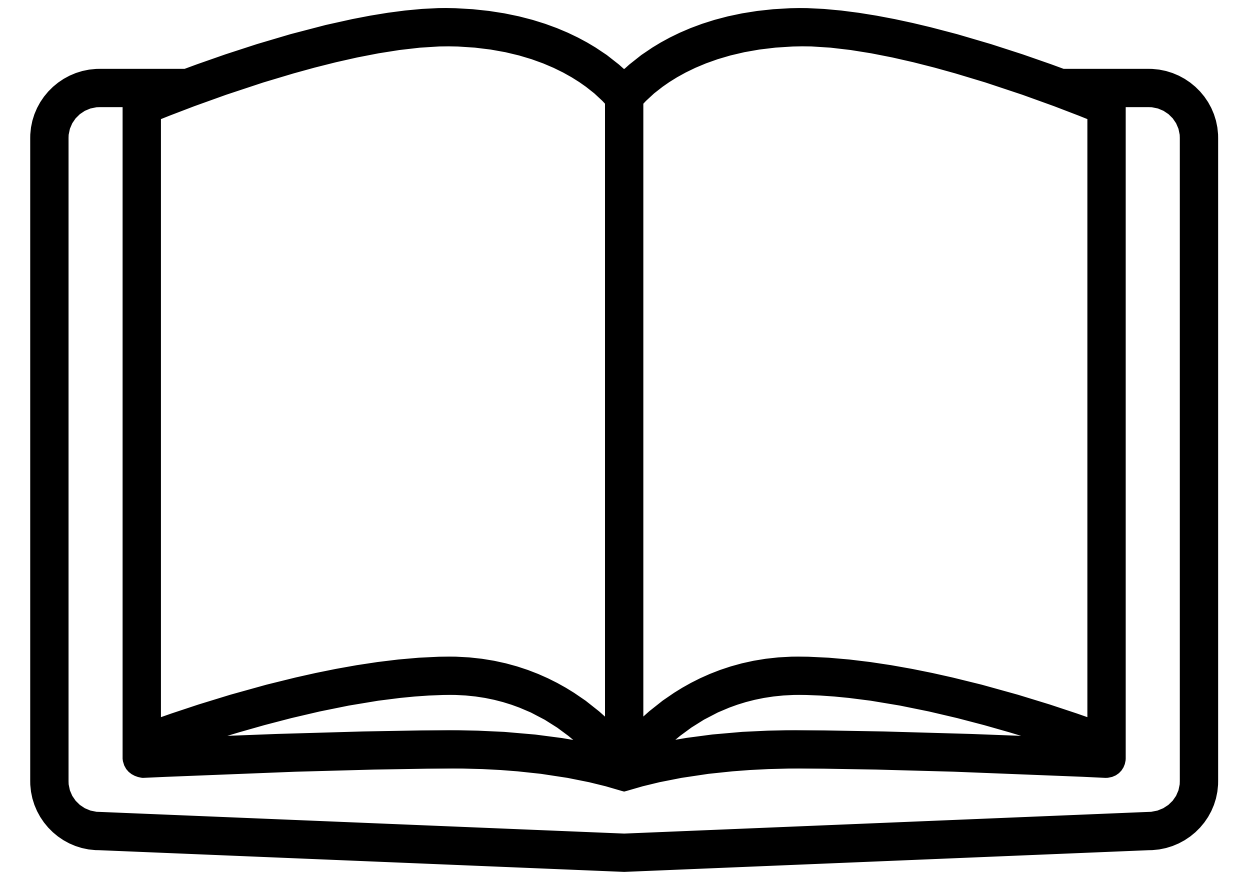
Workflow for Item Entry

1. **Select** the items you intend to catalog. Focusing on one area of the collection is more efficient as the information for records will be similar, if not the same.
2. **Research** and gather information about the selected items either from the items themselves or related resources.
3. **Fill out** catalog template (or spreadsheet) providing information in each field.
4. **Follow** descriptive standards and examples to help construct an item description that meets best practices.
5. **Review** the work completed and check for spelling errors, typos, or incorrect information.



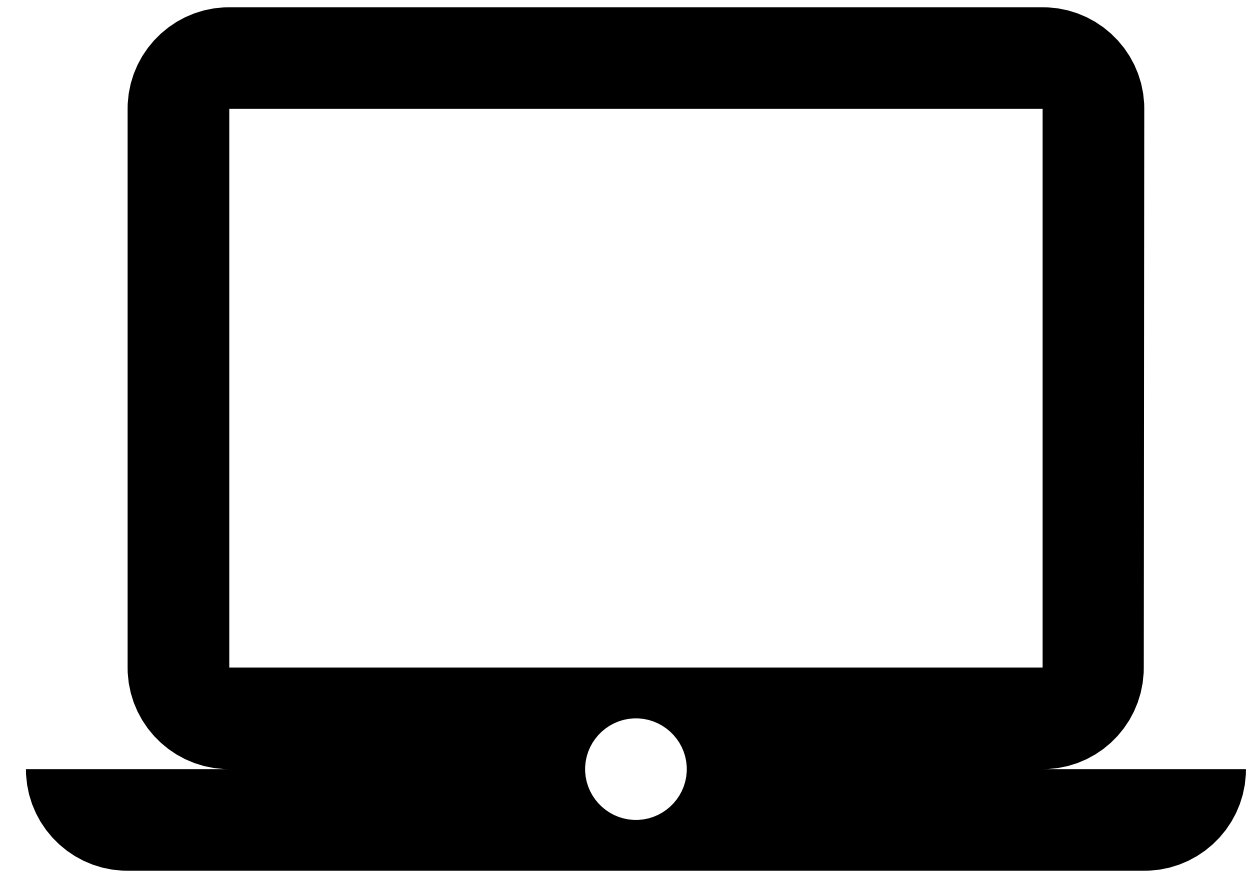
Gather & Research

- Speak with long-tenured personnel and members of the community.
- Review the items surrounding it.
- Consult the paperwork in the accession file.
- Perform quick subject deep-dives with reference material and available resources.



Begin with a Spreadsheet

- Can import into a CMS.
- Can copy/Paste identical information.
- Can view information for related items without switching between records.
- Can review all items together for editing purposes.



How to Use the Spreadsheet

	A	B	C	D	E	F	G	H	I	J	K	L
1	Record Type	Object Number	Object Title	Artist/Creator	Date	Subjects	Classification	Materials	Technique	Inscription	Description	Location
2	Object	A1999.09	Teacup	Grace Kwon	1967	teacups	vessels	ceramic			A hand-painted ceramic tea cup painted with a willow motif wiith gold flecks.	Warehouse 12, column 5, row 1
3												



A Catalog Record Example

	A	B
1	Field	Example Text
2	Record Type	Object
3	Object Number	A1999.09
4	Object Title	Teacup
5	Artist/Creator	Grace Kwon
6	Date	1967
7	Subjects	teacups
8	Classification	vessels
9	Materials	ceramic
10	Technique	
11	Inscription	
12	Description	A hand-painted ceramic tea cup painted with a willow motif wiith gold flecks.
13	Location	Warehouse 12, column 5, row 1
14		
15		





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BREAK (5 Minutes)





The CMS Procurement Process



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Scenarios that lead to a new CMS

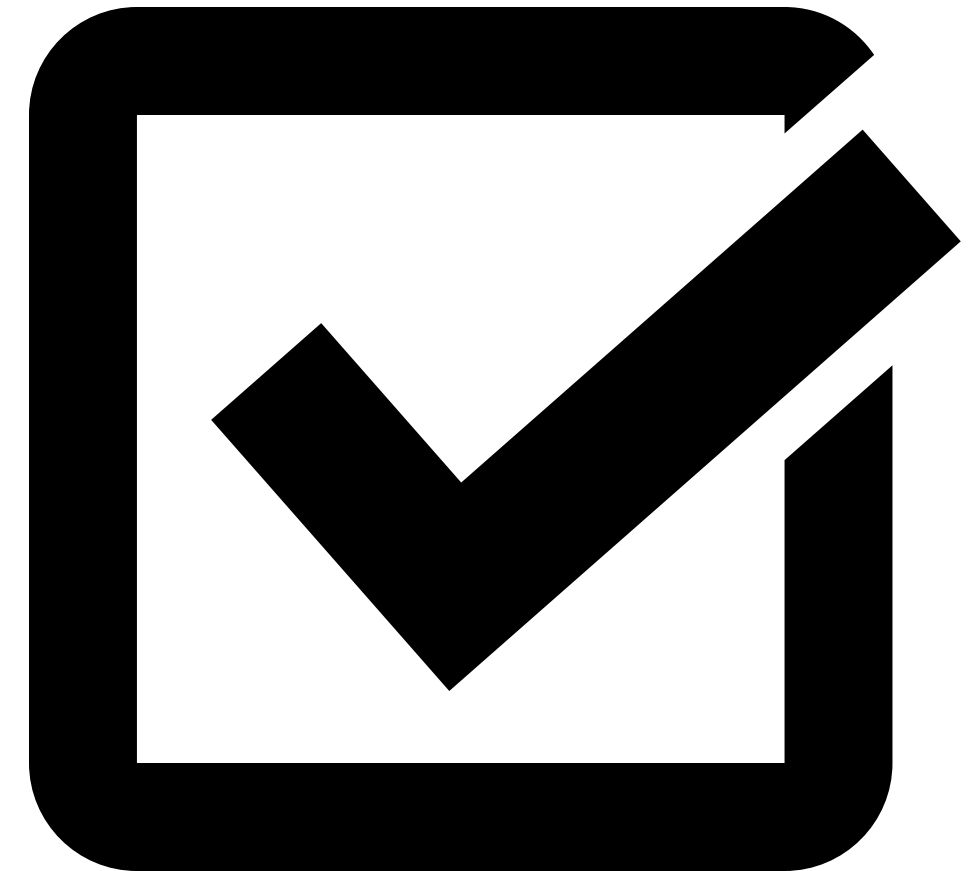
- An increase or decrease in the CMS budget.
- The staff interest or ability to use the CMS changes.
- There's a shift in how technology is used.
- There's a change in operating system requirements.
- The CMS dies, becomes outdated, or is acquired and merged with a different company product.



Procurement

Procurement is the act of acquiring something. It is the aggregate of steps taken to inform the search and selection process.

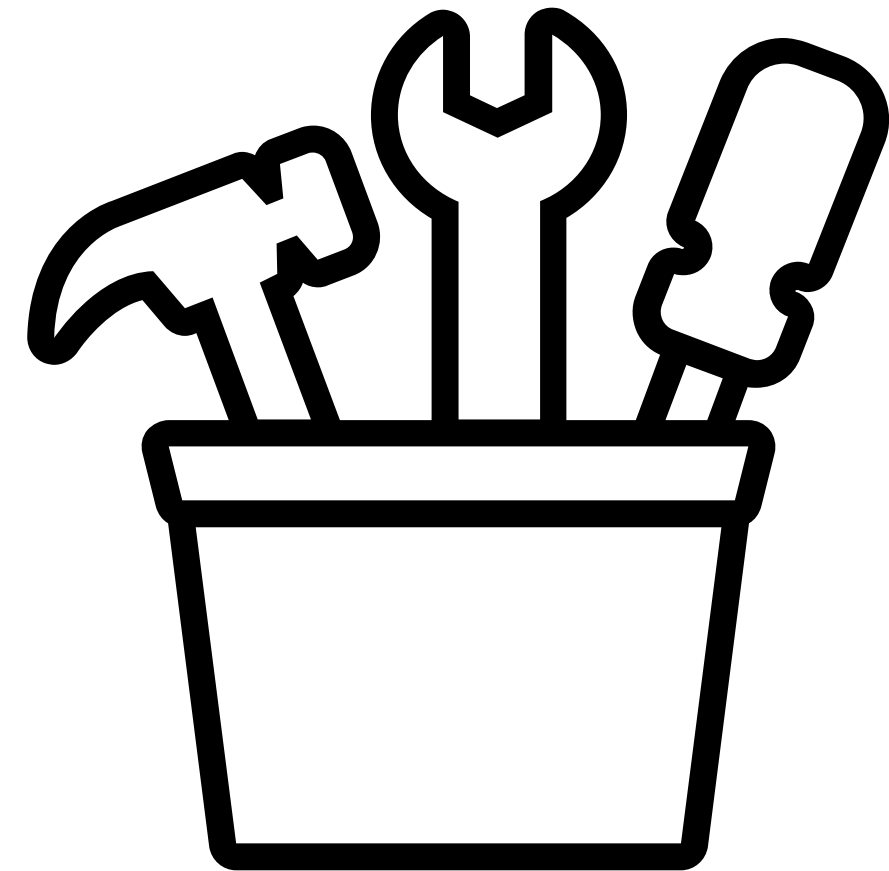
Note: Whether a "purchase" is being made or not, the CMS procurement process is one that museum staff should thoughtfully engage in when selecting their CMS.



Creating Specifications

Questions for Staff to Consider:

1. What tools do I currently use that are required to do my job?
2. What tools do I not have that would make my job easier?
3. What tools do I consider as mandatory versus recommended?
4. What tools are so important that it's a deal breaker if the CMS doesn't offer that tool?



Creating Specifications

Questions for Specific to Organization Operations:

1. What data about the collection do we need to capture?
2. What collection management functions are the most critical to our work?
3. What administrative control levels do we need?
4. What customization is needed (on both the front and back-end) and can the CMS accommodate those needs?
5. What reports or other automation tools are desirable to support museum staff?
6. Do we need the CMS to also publish our collection publicly?



Creating Specifications

Questions Specific to Decision-makers:

1. What is the one-time budget to cover one-time costs?
2. What is the annual CMS budget and is there a plan to increase it year upon year?
3. Do I have the staff in place necessary to make full use of the CMS?
4. Do the staff who need the CMS want additional training or support in order to maximize their utilization of the CMS?



Creating Specifications

A Simplified Specification Rubric:

CMS:	Required: Cloud-based	Required: Customizable Catalog	Required: Report Creation	Recommended: Streaming Media	Recommended: Curation of Content (Digital Exhibit)	Within Budget
#1	Y	Y	Y	N	Y	Y
#2	Y	Y	Y	Y	Y	N
#3	N	Y	Y	N	N	Y





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CMS Options & Costs



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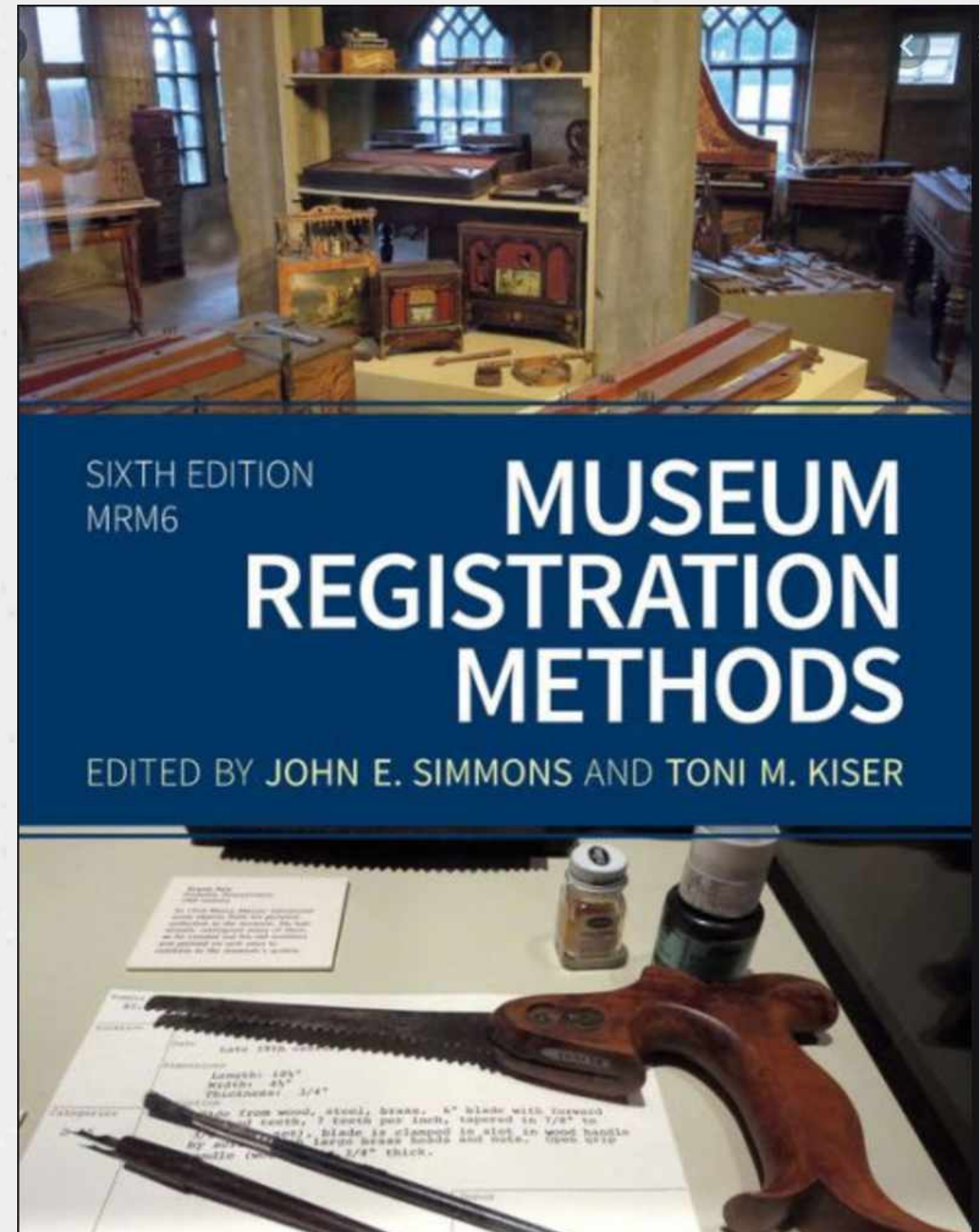


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A couple correction notes on the reading...



A Note About Microsoft Access, FileMaker Pro, Etc.



- Requires extensive database building and maintenance knowledge.
- Rarely built to accommodate collection growth.
- Usually dies or becomes outdated when original creator leaves.
- Is never set up intuitively enough to easily migrate and increases migration time and cost.
- Not user friendly.
- Doesn't provide a public point of access.

A Note About Open Source Tools



- Open source products are like free kittens. They may be free, but the upkeep requires a committed investment.
- Staff expertise or a consultant on retainer *must* be present and accounted for in order to properly implement and maintain the CMS.
- Open Source products are only as healthy as their user community. No updates, customizations, or troubleshooting is available unless it can be sourced from a responsive and knowledgeable community.
- Is never set up intuitively enough to easily migrate and increases migration time and cost.

**All robust
products are now
built to be cloud-
based.**



Where



To Find CMS Options Listed:



- **AASLH's Choosing a Collections Management System:**
<https://drive.google.com/file/d/14FWcHjgrHu2Hu1wLjj47TmlB6z-gGjgb/view>
- **Canadian Heritage Information Network CMS Vendor List:**
<https://www.canada.ca/en/heritage-information-network/services/collections-management-systems/collections-management-software-vendor-profiles.html>
- **Collections Trust (UK):**
<https://collectionstrust.org.uk/software/>
- **Software Comparison Sites such as Capterra and G2**

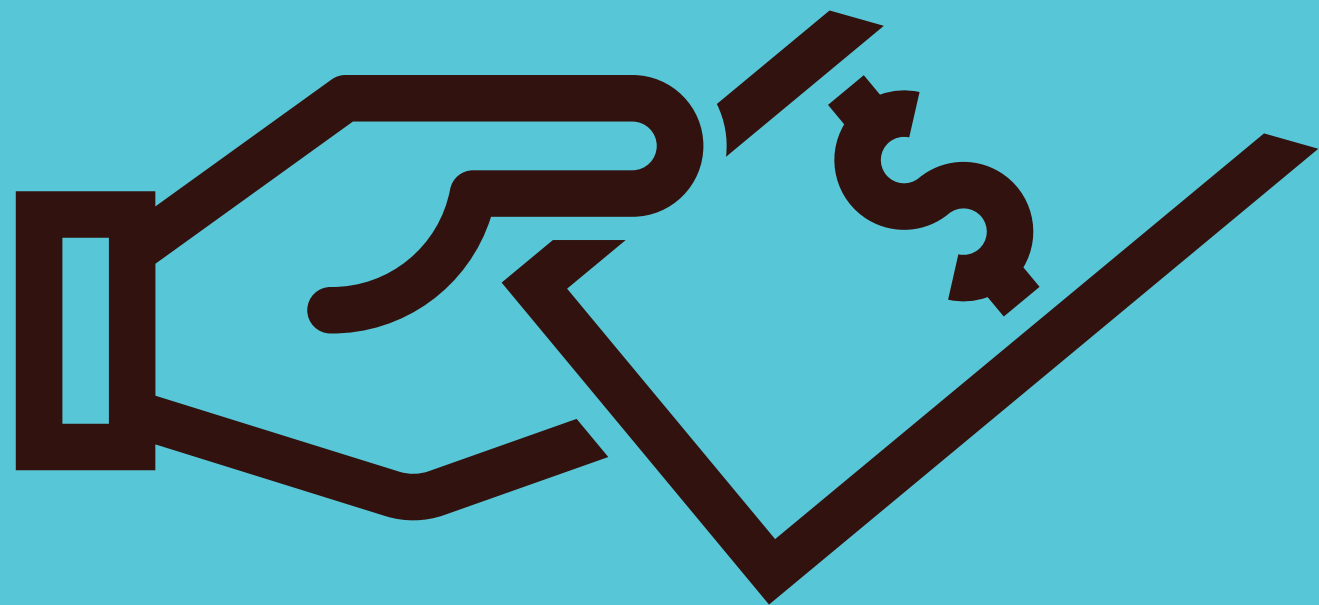
Costs



- License to use
- Per user, per item, per gigabytes
- Setup and implementation
- Transfer and migration of data and files
- Customization on backend and/or frontend



Free to Low-Cost Examples



- Omeka: Free (open source)
- CollectionsSpace: Free (open source)
- Collectify, Artwork Archive, etc.



Free to Low-Cost Examples

<https://libraryhost.com/pricing/>



Omeka

Omeka is a free, flexible, and open source web-publishing platform for libraries, museums, archives, and scholarly collections and exhibitions.

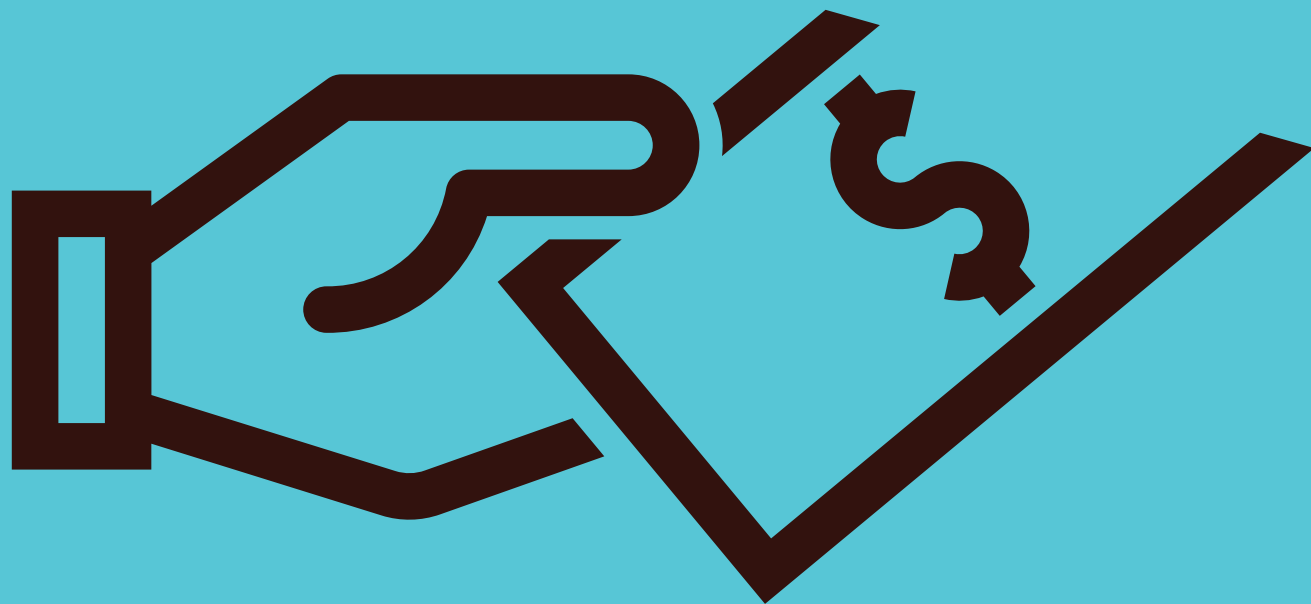
Omeka Light	Most popular Omeka Standard	Omeka Plus	Omeka Premium
<i>For solo users</i>	<i>For small teams</i>	<i>For medium teams</i>	<i>For large teams, or large data</i>
\$299/yr. or \$29/mo.	\$599/yr. or \$54/mo.	\$999/yr. or \$94/mo.	\$1549+/yr. or \$149+/mo.
5 GB Cloud Storage	15 GB Cloud Storage	30 GB Cloud Storage	50 GB+ Cloud Storage
∞ Collections	∞ Collections	∞ Collections	∞ Collections
✓ Plugins	✓ Plugins	✓ Plugins	✓ Plugins
✓ Basic support	✓ Basic support	✓ Basic support	✓ Basic support
•	3 hrs Advanced support	6 hrs Advanced support	10 hrs Advanced support
•	✓ Intro Training	✓ Intro Training	✓ Intro Training
•	✓ Custom Theme	✓ Custom Theme	✓ Custom Theme
•	•	✓ Faster Server	✓ Fastest Server
•	•	•	✓ Dedicated Server
Purchase Light free trial	Purchase Standard	Purchase Plus	Purchase Premium

[Start a free trial of Omeka Light](#)

Free to Low-Cost Examples

Past Perfect:

<https://museumsoftware.com/web-edition.html#public-access>



Packages

Starter

1 User
5,000 Records
100 GB Storage
Public Access optional

Full

10 Users
Unlimited Records
100 GB Storage
Public Access optional

XL

20 Users
Unlimited Records
1,000 GB Storage
Public Access optional

2XL

40 Users
Unlimited Records
3,000 GB Storage
Public Access optional

Pricing

Institutional Members of the American Association for State and Local History (AASLH) receive a 20% discount on the majority of PastPerfect products and services.

One-Time Setup	Standard	AASLH
New User - Starter Package	\$375	\$300
New User - Full/XL/2XL Package	\$1245	\$996
Version 5.0 Upgrader - Starter Package	Free	Free
Version 5.0 Upgrader - Full/XL/2XL Package	\$375	\$300

Annual Hosting, Licensing, Maintenance, and Support	Standard	AASLH
Starter Package	\$745	\$596
Full Package	\$870	\$696
XL Package	\$1245	\$996
2XL Package	\$2245	\$1796

Public Access Annual Hosting	Standard	AASLH
Public Access for Starter Package	\$250	\$200
Public Access for Full Package	\$375	\$300
Public Access for XL Package	\$750	\$600
Public Access for 2XL Package	\$1500	\$1200

Please contact our sales staff to order Web Edition by calling 1-800-562-6080 or emailing sales@museumsoftware.com.

Additional Resources

[Information Sheet \(PDF\)](#)

[Web Edition & Version 5.0 Comparison](#)

[Frequently Asked Questions](#)

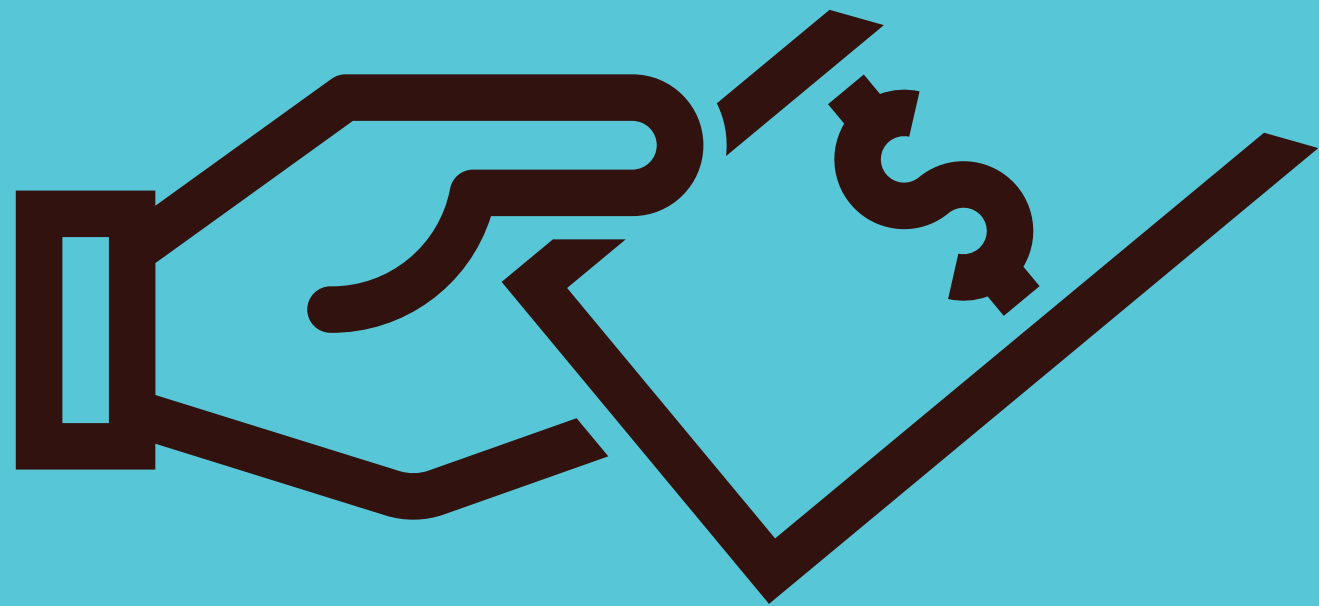
[Web Edition User Guide](#)

[Web Edition Login Page](#)

[Web Edition Knowledge Base Articles](#)

Free to Low-Cost Examples

<https://www.catalogit.app/museum>




Pricing


ANNUAL (SAVE 20%) ☒ MONTHLY ☐

BASIC Free 50 Entries 1 User 5 GB SIGN UP FREE	SMALL \$37.50 /mo 25,000 Entries 8 Users 100 GB SUBSCRIBE	MEDIUM \$50.00 /mo 50,000 Entries 8 Users 150 GB SUBSCRIBE	LARGE \$66.67 /mo 100,000 Entries 8 Users 200 GB SUBSCRIBE
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Add Ons




API, WordPress Plugin & iframe integration
\$20/mo



Additional Users
\$5/mo
PER USER



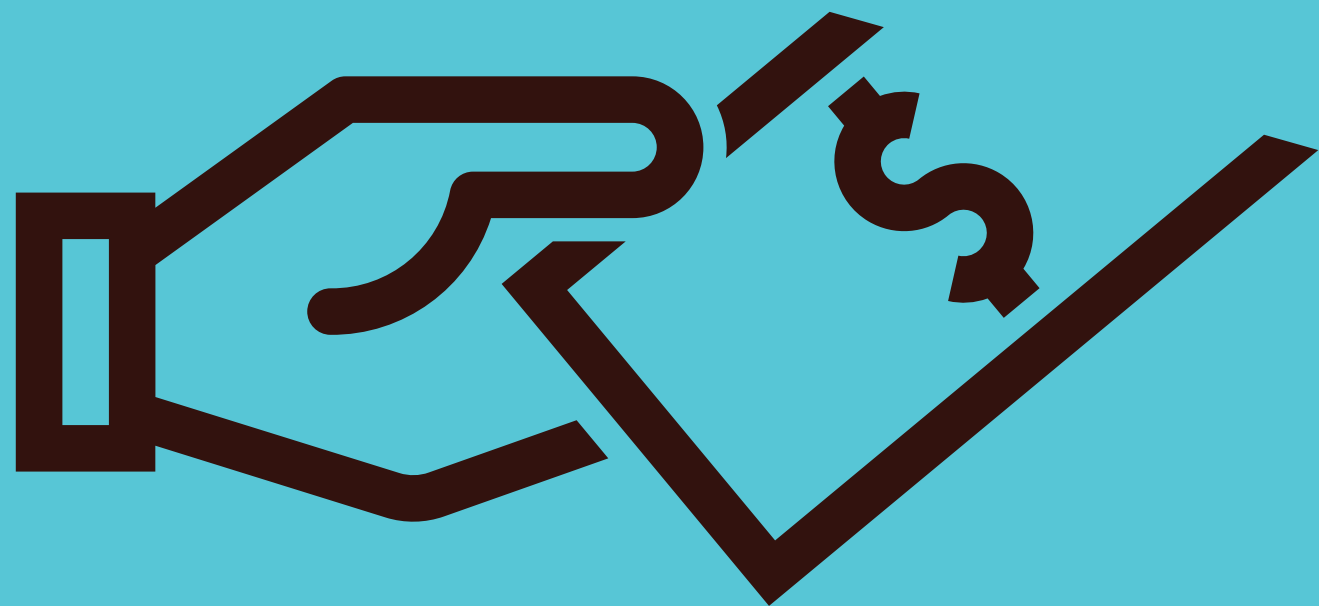
Additional Storage
\$6.67/mo
PER EACH ADDITIONAL 100GB



Every subscription includes web publishing through the CatalogIt HUB.
[LEARN MORE](#)

Low to Moderate Cost Examples

<https://lucidea.com/>

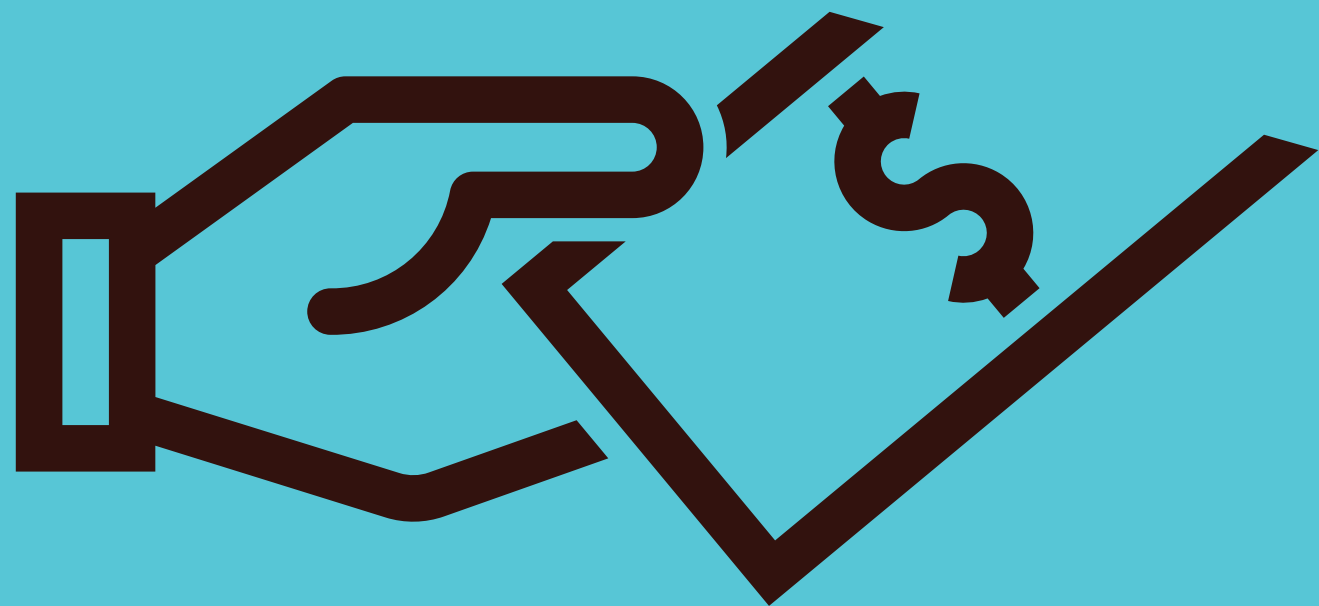


- Lucidea's products (Argus and ArchivEra) are approximately \$7,500* or \$625/month
- Lucidea's Essentia program offers a "right-sized" approach to each product that runs approximately \$3,500* or \$291.66/month

*These are great prices because they usually require a multi-year contract.

Low to Moderate Cost Examples

<https://collectorsystems.com/pricing.html>



Choose the right plan for your collection.

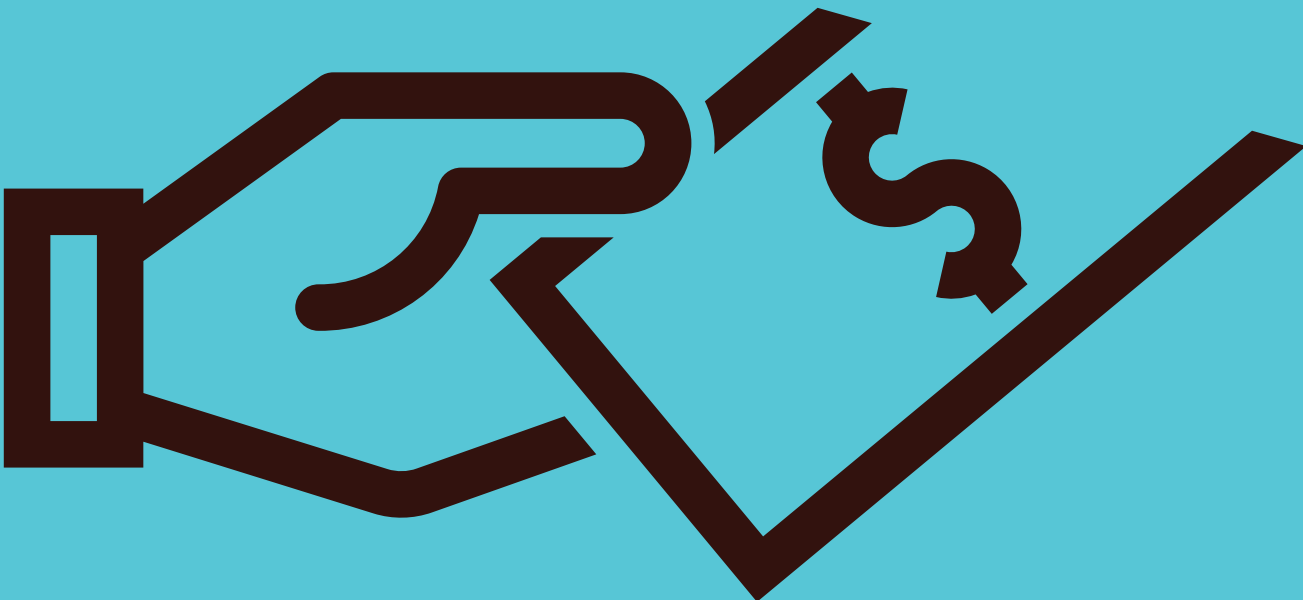
Most popular	
\$85	\$150
per user per month	per user per month
CS Collector + CS Museum	CS Advisor CS Appraiser CS Family Office CS Corporate CS Shipper
Get in touch	Get in touch

All prices shown in USD (\$)
These prices do not include taxes and fees where applicable.

All accounts include free support,
automatic updates, and no setup fees.

Low to Moderate Cost Examples

<https://collectorsystems.com/pricing.html>



Additional Pricing Information

Extra Storage

All Collector Systems accounts come with an initial 10 GB of available storage. Additional storage is available for an additional amount per month.

Up to 10 GB	Included with subscription
10-100 GB	\$20/month
100-250 GB	\$40/month
250-500 GB	\$85/month
500-1,000 GB	\$125/month

Data Conversion

\$165/hour

Collector Systems offers “white glove” data conversion services for the initial upload of data and files into a Collector Systems account. Pricing for data conversion is detailed in a custom proposal document for each project. Each proposal is prepared following a close review of all data and files to be migrated into Collector Systems, along with a personalized consultation and mapping with our team.

Ongoing Registrarial Services

\$165/hour

Our Registrarial team can be engaged for additional project-based work beyond the initial data migration. These services are billed hourly.

Additional Subscriptions

\$50 per subscription per month

What do you do when you can't afford a CMS?

Creatively leverage what you've got.

Item Information and Management:

- Content Management Software (the "other" CMS)
- Spreadsheets, simple databases, etc

Collection Sharing:

- File hosting services
- WordPress or other simple (with free to low cost) options
- Social platforms, such as: Flickr, Pinterest, etc.

Other:

- Project Management Software





Questions & Discussion



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Resources Required for Effective Collections Management



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Know What it Takes



It's important to keep in mind that any collection work takes resources (time + money).

- People (time)
- Training
- Equipment (digitization equipment and computer)
- Software (CMS, likely others)
- Storage: digital (server/cloud storage)
- Utilities: electricity, internet



Sustainability



When choosing a CMS and making related collections management decisions, consider the following sustainability prompts:

- Does our staff possess the knowledge necessary to use and manage the CMS?
- Does our staff have the time to use the CMS to its full capacity? Is this requirement reflected in their job descriptions?
- Does our museum have the annual budget available to comfortably cover annual costs of the CMS?
- Succession point -- easy to pickup



Where Best Practice and Pragmatism Meet



Done is better than perfect, especially if perfection is keeping you from providing care, management, and access to collections.

- Employ best practices where you can.
- Consistency is key.
- Prioritize the elements that are most important for your collection and organization.
- Getting things "done" such as putting things online with basic data, is better than little to no collections items online.



FREE

Resources



Lucidea's Think Clearly Blog:

https://lucidea.com/author/rachael_woody/

Lucidea's Webinar Suite (Resources>Argus>Recorded Webinars>Museums):

<https://lucidea.com/argus/resources/>

YouTube Channel:

<https://www.youtube.com/c/RachaelCristineConsulting>

Newsletter:

<https://rachaelcristine.mykajabi.com/signup>

Free e-book

How to Select, Buy, and Use a Museum CMS:

<https://lucidea.com/blog/ready-to-read-how-to-select-buy-and-use-a-museum-cms/>



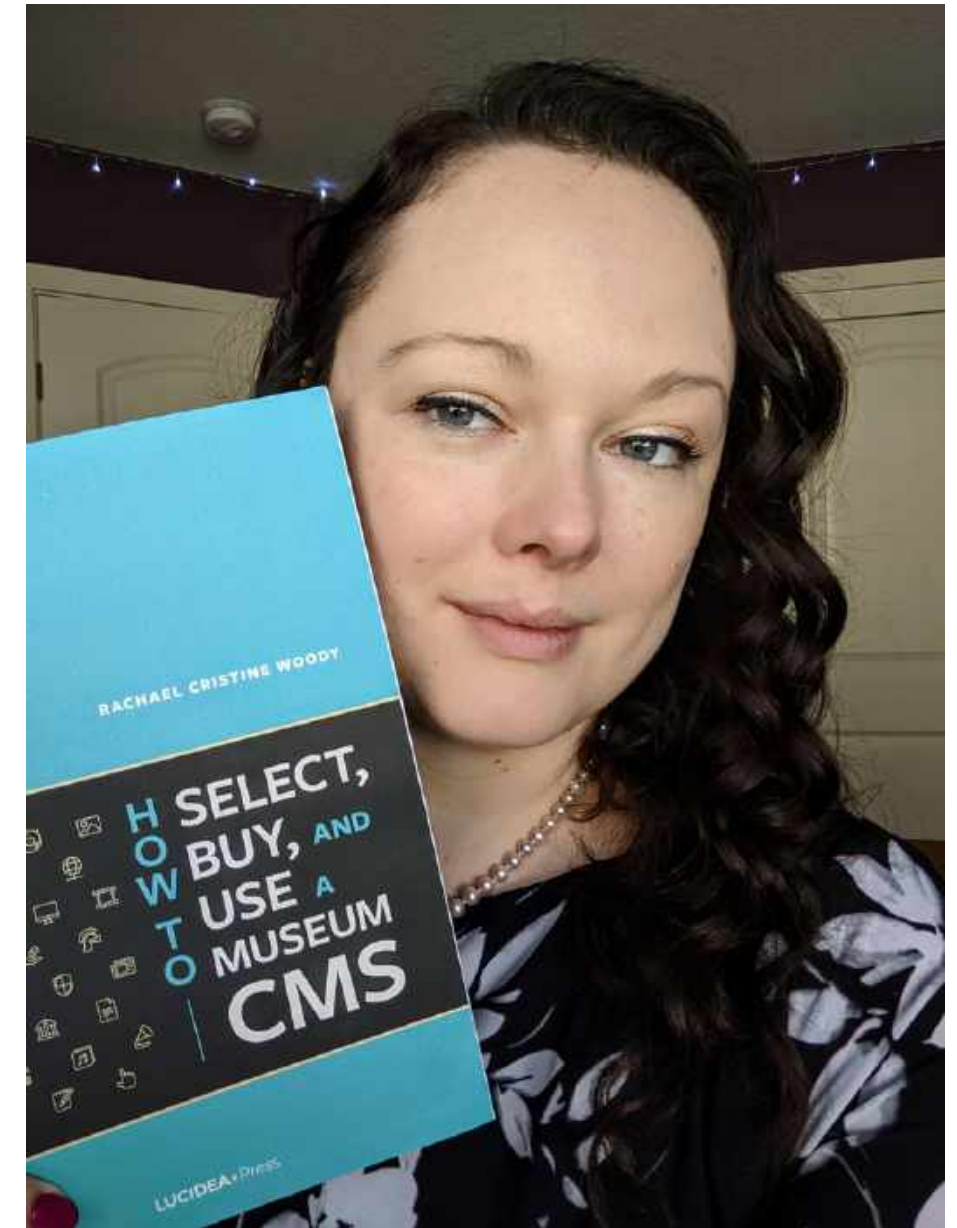
FOR A LIMITED TIME GET YOUR FREE DIGITAL COPY!

How to Select, Buy, and Use a Museum CMS

A CMS is a long-term investment; a museum must be confident in its choice. Rachael Cristine Woody explains how to compare, select, buy, implement, and maximize the value of your museum collections management system.

GET YOUR COPY!

The graphic features a teal and black color scheme. On the left, a tablet and a book are shown, both displaying the book's cover. The cover has a teal top and bottom section with a black middle section containing the title and author's name. The title is in white and teal, and the author's name is in white. The book is titled 'HOW TO SELECT, BUY, AND USE A MUSEUM CMS' by RACHAEL CRISTINE WOODY. The publisher is LUCIDEA Press.



Free e-book

A Survivor's Guide to Museum Grant Writing:
<https://lucidea.com/blog/ready-to-read-a-survivors-guide-to-museum-grant-writing/>



FOR A LIMITED TIME, GET YOUR FREE COPY!




A SURVIVOR'S GUIDE TO MUSEUM GRANT
Writing

Museum expert Rachael Cristine Woody offers advice for museum professionals electing to learn and attempt grant writing, with a systematic, common sense approach to securing valuable financial sustenance.

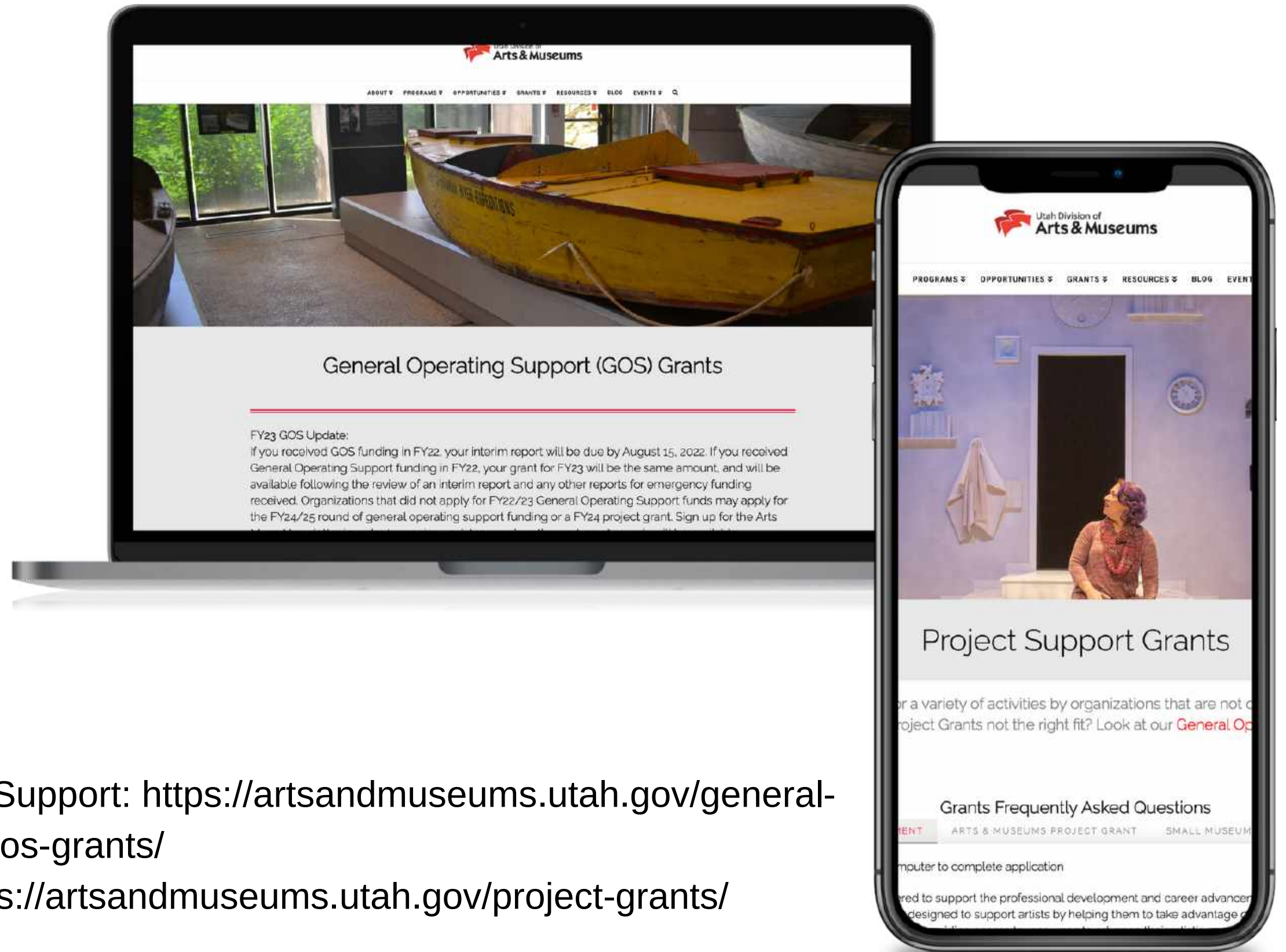
GET YOUR COPY NOW!



Grants



- General Operating Support: <https://artsandmuseums.utah.gov/general-operating-support-gos-grants/>
- Project Grants: <https://artsandmuseums.utah.gov/project-grants/>



Questions?



Please place your questions in the chat. They will be read out loud by the host.





Rachael Cristine Woody

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This project was made possible in part by the National Endowment for the Humanities.

