

Choosing a Collections Management System

By the Collections Management Systems Task Force

A collections management system (CMS) is software designed to manage the collections of a museum or similar organization. It digitizes and stores data, images, and documents to preserve information, give more control to those managing the collections, improve communication, and provide a platform to make collections accessible to the public.

A formal CMS selection process provides a collections-based institution the opportunity to reflect on its collecting and documentation practices, map its strategy, realize new opportunities, identify emerging practices in the field, and ensure it is making the best use of its budget and resources to support this core activity. Done well, the process can have an enormous and sustaining impact on an institution's collecting capacity.

Whether you are looking to acquire your institution's first CMS or searching for a system to replace what you are using now, the process can be daunting for many organizations. Where should you start?

This technical leaflet provides information for reviewing and selecting a collections management system in three parts. Part one provides justification and data about why it is important to adopt a formal process to select or replace your CMS. Part two provides simple guidelines and tips to prepare information and organize yourself for choosing a CMS, and part three gives details and resources to accomplish the selection process.



NATIONAL PARK SERVICE

Museums exist to interpret the past through artifacts, but also to care for these artifacts behind the scenes so they are available for future education. Collections management is the process by which collections are physically and intellectually organized and cared for.

The Importance of a Formal Selection Process

Requirements for collections management have changed significantly over the last two decades. In particular, the internet has driven a more open philosophy towards collections access and discovery, not only in publishing collections on one's website, but also the sharing of collections information with broader cultural content. To meet these new needs, it is important to select a CMS using a formal method, relying on systematically collected data.

A Mellon Foundation-funded study, published in 2018 as *Museum Technology Landscape*, provides data that helps us recognize where collecting institutions are today with CMS and what we need to prepare for the next step. At the time of the study, approximately half of respondents were considering or actively pursuing a replacement for their CMS. Only one quarter of respondents referenced any form of formal process to select their CMS, instead relying on peer recommendation, prior familiarity, or other informal methods. Approximately half of respondents had used their current CMS for over fifteen years, in a landscape where two-thirds have been managing their collections digitally for more than fifteen years. The study also found that roughly half of the staff originally involved in the selection process at these institutions were no longer employed there.

Challenges for Twenty-First-Century Museum Needs

Museums in the twenty-first century are looking at their various collections in a more holistic and integrated way. Users (both staff and visitors) want to understand the relationships between collections. Yet the thought of integrating collection information from previously isolated departments (artifact, archival, natural history, oral history, library, etc.) could not be imagined twenty-five years ago, let alone be articulated or accomplished. Nevertheless, the needs of museum communities have changed and CMS development is fighting to keep up. Few off-the-shelf systems offer the ability to integrate collections information without expensive customization.

Institutions today consistently have more demands on time and production with less staff and funding. Museums need more advanced technology that integrates with other systems, including membership, financial, and operational databases. This can help an institution realize many untapped opportunities both programmatically and operationally. The right system should help increase existing and create new income streams while streamlining work processes and time management.

A diligent CMS selection process requires an institution to widen its search beyond what it is familiar

with to explore and review systems that match their requirements in terms of both price and functionality. Conservatively, there are at least thirty CMS platforms on the market that, in addition to offering core collections management functionality, offer a variety of extended functions and installation options (local, network, or cloud-based) to suit many needs.

Top Reasons to Invest in a New CMS:

- Advance institutional goals in public service, accountability, and efficiency
- Increase accessibility for all users to broaden meaningful use of the collections
- Improve collections management and care
- Greater efficiency and functionality for intellectual control
- Improve legal accountability with properly recorded, managed, and accessible records
- Advance management and use of digital assets (Digital Asset Management System/ DAMS)

Getting Started

Before jumping into the deep end, make sure you establish a project team. That team can be made up of three to ten people, depending on your organization's size and needs. Choose a project leader to oversee the work and include individuals who interact with the collections in different ways (curators, archivists, collections managers, leadership, educators, volunteers, researchers, etc.). A variety of people will bring different and valuable voices and viewpoints to the selection process. Remember that not every member needs to be at every meeting and on every task. Value your team's time.

Define the Roles of the Project Team

Ideally each function in the team will be the responsibility of one person. In many situations, several roles may be the responsibility of one person. If needed, look beyond regular/paid staff to volunteers, board members, and other community members.

Regardless of job title, assemble individuals responsible for:

- Team leadership: keeps the project on track and communicates progress to institutional leadership.
- Technical advice: knows about technology in general and preferably the institution's technical capabilities.
- Data collection: knows about how data is stored, organized, and used in the current system, and able to evaluate how a potential CMS would fit the data needs of the collection.



A dedicated project team makes choosing a CMS an easier and more comprehensive process.

- Purchasing: knows about purchasing procedures for the institution and responsible for communicating with vendors (this role is particularly important if you are a government institution with complex requirements).
- Collections knowledge: knows about the various collections and data management needs, and familiar with collections policies and procedures.
- User needs: knows about the needs of non-staff users such as researchers, students, teachers, web users, etc. (which might include creating a survey or focus group).
- Other functions if needed: if you want a CMS that provides an integrated system beyond collections including point-of-sale, membership management, and donor management, have a representative responsible for articulating the needs of these other areas to the team.

Identify the Reasons for Choosing a New System

Articulate what the needs and concerns are. This does not need to be a long list. Use this to start figuring out what you need the new system to do, and this information should also be used to communicate to stakeholders.

Identify Future Goals

Think long-term and plan for the future. Could the system be used in other areas of the institution? Could the system help with future income? What kind of online presence do you want long-term? In some cases, CMS can be upgraded or appended later to meet future needs. Hold a brainstorming session, make a survey, or attend regular department staff meetings to get ideas without making your team large and unwieldy.

Determine the Scope, Time, and Budget

Be specific and realistic about “musts” for CMS functions. Set limits for time and budget. Realize the relationship between scope, time, and budget and be ready to alter each as the project moves forward. Make sure to include installation, maintenance, and ongoing support costs in your budget.

Identify the Stakeholders

Beyond the team, who is involved with the CMS? Consider volunteers, borrowing institutions, donors, researchers, and marketing folks. What are their needs for a CMS, and what stake do they have in the project? Do you need to survey them?

Examine Your Current Collections Documentation

Document where and in what format collections documentation is currently stored. This will influence the cost and potentially your choice of CMS.

Determine Who at Your Organization Has Contracting Authority

This sounds straightforward, but can be complicated in some situations. Who can authorize a Request for Proposal (RFP), and who can sign the contract?

Establish a Project Schedule

Include planning, procurement, launch, and testing phases. Consider other upcoming projects and your cyclical busy seasons.

Establish a Communication Plan

Be prepared to inform staff, volunteers, board members, and the public of possible upcoming changes. This

may occur in different phases and could include marketing and personnel training.

Making It Happen

Convince Decision Makers and Funders

Once you have a team and plans for first steps in place, prepare a case statement to serve as the core document to fundraise for this project. The statement should include the mission, vision, and a brief history of the organization, as well as a clear outline of the need for a collections management system. A case statement is the opportunity to describe the project in detail.

To prepare a compelling statement, include answers to the following:

- What is a CMS?
- How will it impact our mission?
- Why is our current method ineffective?
- What is our long-term goal?
- How can the CMS benefit other areas of the organization?
- What is our implementation plan?
- What is the cost?

Next, identify potential funders.

- Federal, state, and local grant-makers, including corporations and private foundations
- Community foundation
- Current donors

Grant-Makers

Capacity-building grants may be the best option for funding a CMS. Grants are non-repayable funds that

provide financial assistance to tax-exempt organizations. Look for a funder whose giving priorities align with your project's needs and proposed outcomes, and make sure your proposal fits their guidelines. Potential federal grant partners, such as the Institute of Museum and Library Services, the National Endowment for the Arts, and the National Endowment for the Humanities are listed on Grants.gov. Check with your state humanities council, arts council, historical society, and field services office about regional, state, and local grant options.

Community Foundations

Community foundations serve a specific geographic areas. They are grant-making public charities made up of a collection of individual charitable funds serving a variety of diverse causes. Community foundations support local nonprofits, highlighting areas of need and worthy causes and collectively connecting individual donors to support in the community as a whole. Even if your local community foundation cannot fund your project, they may know of another funder who might be interested, so it's good to make the connection.

Current Donors

Review your current database of donors to identify those with capacity and/or interest in collections care. First consider donors to the collections. Look to those who have contributed money and objects: these individuals understand the value of an organization's collections to its mission.

Once prospective funders have been identified, it's time to write a funding proposal. Take the time to research and gather information about the potential funders: this will be valuable when personalizing “the

ask” and making the connection between the funder and project. Start with an introduction, then a summary of the need and/or the case statement, and the budget. For greater impact include anecdotes, case studies, and photos of how the current CMS functions and how a new CMS will improve service, workflow, and preservation. Conclude with an explanation of benefits the organization can provide as thanks for the donors' support like recognition or a special tour of collections areas. Use this as an opportunity to be creative.

The collection is the heart of the organization. It defines the purpose, the audience, and the relevance of the organization. Fundraising for appropriate



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The more information you seek to document about your collections, the more useful you will find a formal CMS.

management, care, and conservation is essential to the success of the mission. Be sure to include this in all proposals and place the emphasis on the project and less on the organization. There is no organization without a collection.

Defining Your CMS Requirements

To figure out what requirements you have for a CMS, start by assessing what you have. Doing this will help you determine the strengths and weaknesses of your current practices and will help you see where there is room for improvement.

- List all the information you track in your current system. If you don't currently use a CMS, list the information you track on catalog sheets, accession books, or in spreadsheets. Consider different needs for art, artifacts, oral histories, books, and digital collections.
- What functions does your current CMS provide that you need in the new system? Can it make the collection searchable online? Does it track loans (including interlibrary)? Does it organize exhibition information? Does it track membership? Are both collection and monetary donors tracked and cross-referenced? Be sure to include those in your list as well.
- Consider the future needs of your institution as well as potential users of your data for both collections and other institutional functions.
- Are there any specific things you wish your current system did? For example, can you only use your CMS on specific computers, but wish you could use it on any device? Does the system need to interact with

other applications or software? Do you need a point-of-sale application?

- Take time to review and hone business processes and workflows. Document the institution's strategy with respect to collecting and collections management.
- Review and analyze how effective current operations are, including some Return on Investment (ROI) calculations. An ROI and/or Total Cost of Ownership (TCO) of a current and new CMS should include the actual cost to the institution and the potential in terms of revenue and productivity.

Choosing the Right Type of Product

After the needs of your organization and users have been determined, there are several approaches you can consider for acquiring a CMS (see table below).

Local, Network, and Cloud-Based Systems

There are many options for data storage, and most of those options fall into three broad categories: local, network, and internet (cloud) storage. Each has its advantages and disadvantages. The option you choose will largely depend on existing infrastructure and access needs. There are pros and cons to each choice and knowing what best suits the institution's needs is a big step in choosing a CMS.

Local installation is a stand-alone computer with CMS software installed on it. **Network** installation is a CMS on a server attached to multiple computers. **Cloud**-based installation is a CMS installed online and accessible through the network to any computer any-

Purchase "off-the-shelf"	Purchase a system that is pre-built to perform all or most of your required functions, hosted either by your organization or by the software provider. PROS: This option is usually the most economical. CONS: Will likely compromise some of your requirements or items on your wish list.
Purchase a commercial product and have it customized	PROS: This option will help avoid some compromises. Like the off-the-shelf option, it has a maintenance and support structure behind the product. CONS: Usually entails additional costs, and heavy customization may adversely affect future system upgrades by the provider.
Acquire an open-source solution and contract for development	This method may allow you to acquire a product that is more customizable. Hiring an outside contractor to customize the product for you will include additional costs, but does not require you to have the in-house expertise needed to complete the customization.
Acquire an open-source solution and develop in-house	Because open-source software can be free to acquire, this option can be very economical if you have the skills and knowledge on hand. It should only be chosen if you have considerable information technology expertise on-staff to install, test, customize, maintain, and support the software. You should also be sure that this IT support will remain an integral part of your organization's staff in the future.
Create a custom system from scratch	Creating your own system allows you to have greater control over the end product and can ensure that you meet all of your needs and wishes. This approach requires a great deal of time and specialized expertise to design, develop, and maintain the system. It is rarely a timely or cost-effective solution.

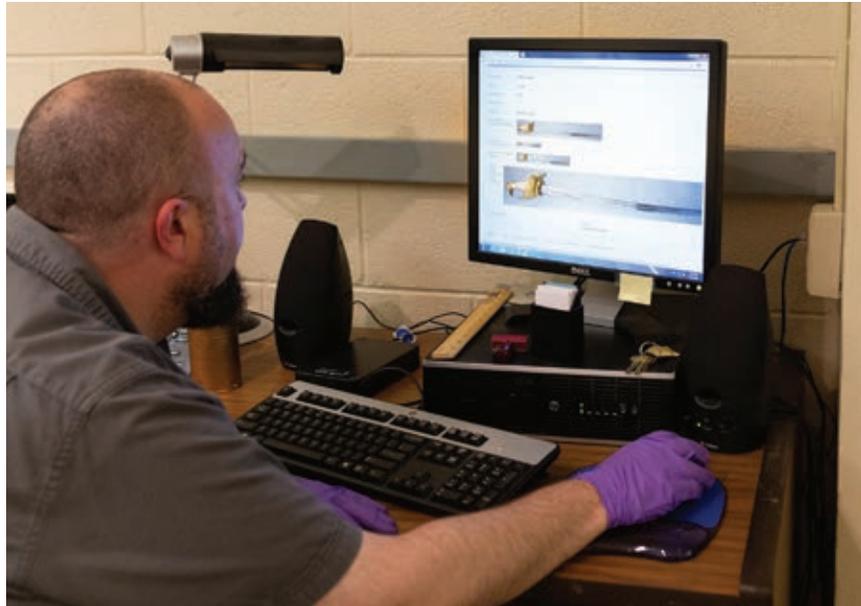
where. These options can also be combined. Think of these options as a sliding scale. The more local the installation of the CMS software the more responsibility the manager has to maintain, update, and back up the system and data. Cloud systems give more access points to data, but offer less control.

There are three types of security regarding these choices: physical, data loss, and access. Local systems have the highest security against someone accessing data, but less security for data loss and even less for physical security. Network systems have medium security overall. Cloud systems have high security for physical and data loss. Access security for cloud systems has so far proven safe but, for some, trusting the cloud is still difficult. Some CMS providers combine the strengths for these systems. You can as well by creating an off-site backup for a local system, for example.

How to Write an RFP

Develop a vendor-request process known as a Request for Proposal (RFP). An RFP is accepted best-practice for selecting any significant software application. An RFP is a structured document, often a spreadsheet, drafted by an institution that details the scope and functionality that it would like from a CMS. Document exactly what data will be entered in the system and what will be done with it. The requirements can be broad, (“Does your CMS have a web publishing module?”) or highly specific (“Can I use wildcards and search only the object title field?”).

The Canadian Heritage Information Network (CHIN) has made two invaluable tools available



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No matter what type of system you use, the goal of collections management is the same: to be able to easily access and organize information about artifacts while ensuring their long-term preservation.

through its website (www.canada.ca/en/heritage-information-network.html) which help guide the RFP and CMS selection process. The first is a detailed RFP guide to help you prepare an RFP specifically for a CMS. The second is a robust checklist that will help you define your specific requirements and select the program that best suits your needs. As you move forward in your own CMS selection process, these resources should be consulted thoroughly and often. They will help you navigate the process and take you step-by-step through the crucial detail work of finding the product that is best for your institution. CHIN’s CMS criteria checklist will help you think about the vast array of requirements you will want to consider.

Whether your RFP is very broad or very specific, it is most important that you are clear in laying out your requirements. This document will form the basis for a bidding process from CMS vendors who will respond in detail about their product and how it meets your

	<i>Pros</i>	<i>Cons</i>
Local	<ul style="list-style-type: none"> • Most secure data • Quickest access to data 	<ul style="list-style-type: none"> • High maintenance responsibility • Backup’s protocol falls on the user • Limited access to data
Network	<ul style="list-style-type: none"> • Low maintenance responsibility • Backups handled by network administration • Data accessible to network users 	<ul style="list-style-type: none"> • Busy networks can slow data access • Data security defined by network administration • Access to data for reporting can be limited
Cloud	<ul style="list-style-type: none"> • Maintenance responsibility falls on the company • Backups are ensured by the company • Access to data is virtually unlimited 	<ul style="list-style-type: none"> • Security of data is largely out of the user’s control • Data access can be slow (dependent on connection) • Access to data for report is limited

requirements. You should be sure to submit your RFP to at least three different systems for review (you may want to include your current system). You may also elect to post your RFP on a relevant listserv or on your museum’s website to allow vendors you may not be

familiar with to respond. This variety will enable you to make good judgments about the products. Once you have received responses, the project team should review them to determine which product most closely matches your needs.

When putting together the RFP, make sure to include the following things:

Cover Page	Include the name of your organization, the budget for the project, a short description of the RFP goal, and a general timeline for RFP submission, project start-up, and project completion.
Background	Describe your organization, collection size and type, current state of digitized materials, online content, and plans for future growth.
Technical Environment	Describe in detail your current CMS as well as your network if you have one, operating systems, computer equipment, and internet browsers. Try to be as detailed about your current and future CMS as possible, including information such as how many records are in your systems, how many users have accounts, and what each user has permission to do within the system.
Contact Information	Provide contact information for your contracting authority and any individuals that vendors can contact if they have questions.
Timeline	Outline the dates of the RFP, including deadlines for submitting proposals, timeline for evaluation, and timeline for project start-up and completion.
Scope of Work	The scope of work will form the core of the RFP. It should outline in detail what the organization is seeking and should be based on your preliminary internal research. The scope of work should include, but not be limited to, major project goals; the necessary functions the CMS should provide; any functions that are not necessary, but highly desired; required training and documentation; data migration; expectations about backup of data and ongoing support after installation.
Limitations	Describe the parameters of the project. Will ongoing support be required or will support be on a case-by-case basis? Are there limitations to the length of contract? Be sure to note the maximum budget.
Collections Management Requirements	Spell out the procedures that the system must handle. These are the primary functions you plan to use most of the time and are crucial to doing your work. Ex: object entry, acquisition and accessioning, location and movement, condition reporting, loaning in and out, deaccessioning, and disposal.
Submission Requirements	Outline for bidders what they should include in their submission. Tell them where to submit and when, how many copies, and in what format.
Contractual Details	Be sure to include general legal information, such as details about specific lines of communication, the right to cancel the RFP, and issues related to subcontracting.
Evaluation Criteria	Describe for the vendors how you will be evaluating their proposals. If you will be looking at clarity of proposal, the total cost of the project, their understanding of your needs, or their track record based on references, tell them up front. They will put together a better proposal if they understand what you want.
System Demonstration	You should always request a demonstration of each product, so you can be sure that you have seen what it can do. Make sure you let the vendors know what type of demonstration you would like. Would you like them to offer a live virtual demonstration? Would you prefer a downloaded version? What features need to be included in the demonstration? Use your mandatory requirements list to determine the features to be demonstrated and make sure you have key personnel available for the demonstration.

Calculate Real Costs

As you create your RFP, you want to have a general understanding of real costs, which encompass all expenses related to the system: not just the software itself, but the costs of maintaining and managing it. Be sure to include questions regarding warranty, registration, and ongoing support costs in your RFP process so that you receive quotes from each vendor. You will want to ask about any equipment purchases and/or upgrades each vendor recommends along with the CMS, such as a new computer, server, or hard drive. While a vendor may not provide such materials, they are often necessary to ensure the system functions optimally.

The IT member of your project team should be able to help you estimate the amount of time it will take to provide operational oversight of the system. If, for example, an employee will invest ten hours per week to manage the system integration, multiply his/her hourly rate by ten and consider that a regular expense. Together, the costs of purchase, maintenance, associated equipment needs, and system management will equal your real costs. This figure will be instrumental as you compare the offerings of each CMS vendor, and as you prepare your CMS-related components of your budget moving forward. Also figure out the life expectancy of the product: when should you be prepared to replace or upgrade it? Find out if upgrades are optional, mandatory, and/or included in the purchase price of the product or the maintenance contract. Found out what upgrades cost and budget appropriately.

List of CMS Companies

Archive Tech <https://architech.net>
ArtsystemsPro www.artsystems.com
Axiell Collections <https://alm.axiell.com>
Collection Harbor <https://collectionharbor.com>
CollectiveAccess www.collectiveaccess.org
Collector Systems www.collectorsystems.com
Gallery Systems www.gallerysystems.com
HistoryIT <https://platform.historyit.com>
Keepthinking www.keepthinking.it
Lucidea <https://lucidea.com/argus>
LYRISIS www.collectionspace.org
Minisis Inc. www.minisisinc.com
Mukurtu <http://mukurtu.org>
PastPerfect Software Inc. www.museumsoftware.com
Re:discovery Software <https://rediscoverysoftware.com>
SKINsoft www.skinsoft.org
Vernon Systems Ltd. <http://vernonsystems.com>
Zetcom www.zetcom.com/en

Identify CMS Companies

Now you are ready to find the right company to provide the CMS system you need (finally!). One resource to help narrow the field is the CMS Company List below. This is a brief overview of a large number of companies with a wide variety of capacity. The second resource is the Canadian Heritage Information Network (CHIN) CMS Vendor Profiles.

Do not make decisions from these lists alone. You want a strong business relationship with the company you choose. Start with contacting the companies on your short list and have the conversation of where you are, what you want, and where you want to be. Be sure not to over or understate your situation. Check out each company's list of who already uses their system. Call institutions similar to yours and ask questions. Most people are happy to help colleagues.

Conclusion

Whether you are looking for a CMS to replace a current system or acquiring one for the first time, it is important that you are very thoughtful and thorough during the selection process. While informal selection methods may seem easier, a formalized process will provide the opportunity to make certain that you have considered all angles and taken all needs into consideration. Preparing an RFP will bring the necessary people to the table to ensure that your organization understands and clearly defines its collections management and technical needs. While it may seem like a lot of time and energy to invest, the benefits of reflecting on collections practices, mapping strategies, thinking about the future, and aligning budget and resources with core museum activities will be an ample return on your investment.

View the full CMS report, including a glossary of terms, more detailed information about each company, and further resources at www.aaslb.org.

The Collections Management Systems Task Force works to provide collecting history organizations with practical how-to information and resources to use when searching for a new CMS. Task force members are: Paul Bourcier, Sheila Carey, Julia Gray, Nik Honeysett, Jessica Jenkins, Julie Kemper, Jennifer Landry, Aimee Newell, Katrina Ojaste, Erin Richardson, and Laura Hartz Stanton. Contact Julie Kemper at julie.kemper@ky.gov.



AASLH TECHNICAL LEAFLET 286: CHOOSING A COLLECTIONS MANAGEMENT SYSTEM (SPRING 2019)

To access the full leaflet, please visit the AASLH Online Store at aaslh.org.

APPENDIX

APPENDIX I: TERMINOLOGY AND DEFINITIONS

API (Application Programming Interface) – a set of routines, protocols, and tools for building software applications. An API specifies how software components should interact. They are used when programming graphical user interface components.

CMS (Collections Management System) – software used by collecting institutions to manage information about a museum’s collections, avoid record duplication, and improve communication between departments. At the core of every CMS is a cataloging system that contains record surrogates of the museum’s objects and images to illustrate them. Systems range from very basic to highly complex and may include the ability to track information relating to provenance, history, exhibition, conservation, loans, publications, and other details related to objects in the collection. In many cases, a CMS also plays a vital role in supporting a museum’s goals of making collections available to the public electronically.

DAMS (Digital Asset Management System) – a content management system that centrally stores and manages all digital files produced by an institution, department, or entity. It allows an organization to control and centralize management of digital content or data that is accessed or shared by staff members or other users.

OPAC (Online Public Access Catalog) – an online database of materials held by a library, or group of libraries, that is available to the public. An OPAC is an electronic version of a card catalog, serving as an entry point to collections for the public. It is accessed through a computer or other electronic device and helps users locate the resources they seek.

RAM (Random Access Memory) – the physical hardware inside a device that temporarily stores data, serving as the device’s “working” memory. Additional RAM allows a computer to work with more information at the same time, which usually improves total system performance. RAM is found in servers, PCs, tablets, smartphones, and other devices.

RFID (Radio Frequency Identification) – RFID tags are intelligent bar codes that can talk to a networked system to track objects. Unlike traditional bar codes that can be cumbersome and



time consuming, RFID tags can allow a museum to track and manage items without unnecessary handling. The tag needs to pass near a reader, but does not need to be in sight, meaning the

object does not need to be moved. Information such as object name, accession number, photo, description, and location can be quickly accessed.

RFP (Request for Proposal) – a document issued by a business or organization to request vendor bids for products, solutions, and services. It outlines the project or program in question, as well as the bidding process and contract terms. An RFP provides guidance to vendors on how the bid should be formatted and presented.

ROI (Return on Investment) – a performance measure used to evaluate the efficiency of an investment or compare the efficiency of a number of different investments. ROI tries to directly measure the amount of return on a particular investment, relative to the cost. To calculate ROI, the benefit (or return) of an investment is divided by the cost of the investment.

ROM (Read-Only Memory) – a type of storage medium that permanently stores data on PCs and other electronic devices. It contains the programming needed to start a computer, which is essential for boot-up. ROM performs major input-output tasks and holds programs or software instruction. It is read-only, and cannot be changed.

SEO (Search Engine Optimization) – the practice of increasing the quantity and quality of traffic to your website through search engine results.

TCO (Total Cost of Ownership) – an estimation of the expenses associated with purchasing, deploying, using, and retiring a product. The TCO not only takes into consideration the purchase price of an asset, but also the costs of operation.

UGC (User Generated Content) – any form of content such as video, blogs, discussion form posts, digital images, audio files, and other forms of media created by consumers or end-users of an online system or service that is publicly available to other consumers and end-users.

APPENDIX II: ROI AND TOC

Anytime you purchase new equipment or establish new systems, you will want to consider the return on investment (ROI), meaning, quite literally, what you are getting in return for the initial investment. In terms of a CMS, you will want to return to the original calculation of real costs, as well as your operating budget, to best understand the original costs of the CMS purchase and expenses with its ongoing maintenance. Together, these figures constitute the total cost of ownership of your CMS system, or TCO. In order to calculate an ROI, a museum should consider all the ways in which the organization has benefited from the CMS. This can include collections data, such as the number of objects catalogued and digitized, and can also include financial benefits, such as the reduction of staff hours needed to oversee outdated or redundant files, or



lowered maintenance needs because your systems are more current. Other figures, such as increased traffic to your website or visits to your site for research purposes, can prove useful. It is

important to keep in mind that an ROI can, in most cases (such as reduced expenses and increased efficiencies and visitor traffic/attendance), equal a monetary value; in others, like an enhanced professional climate and behaviors, the benefit is not data-reliant but equally important.

APPENDIX III: CHIN RESOURCE LINKS

CHIN – RFP Guidelines

www.canada.ca/en/heritage-information-network/services/collections-management-systems/request-proposals-collections-management.html

CHIN – CMS Criteria Checklist

www.canada.ca/en/heritage-information-network/services/collections-management-systems/software-criteria-checklist.html

CHIN – CMS Vendor Profiles

www.canada.ca/en/heritage-information-network/services/collections-management-systems/collections-management-software-vendor-profiles.html

APPENDIX IV: POTENTIAL QUESTIONS TO ASK A CMS COMPANY

SYSTEM

- Is the CMS hosted on site or cloud based?
- Is the vendor actively developing updates/new modules?
 - also indicates longevity of product
- If the vendor's product is open source, what is its support model? Consortium?
- Is the CMS compatible with PC and/or Mac?
- Is the CMS tablet (mobile) friendly?
- Does the CMS have the capability to work offline, or is an internet connection required?
- How many users does the CMS allow?
- Is the CMS designed for cultural institutions (history, art, science, zoo, etc.)?
- What kind of API does the CMS have for interaction with other applications or software?

USER END

- What training options are available?
- Are there varied data fields for museum, library, and archival collections?
- Can the product be customized?



- What are the capabilities of the front end? How is information displayed?
- Can users reclaim their data from the CMS if they decide to stop using it or switch to another system or you go out of business? How easy is it to do?
- Is there an online component for researchers? What does it look like and how customizable is it?

COST

- What are start-up and long-term maintenance costs?
- Are there add-ons that have additional costs?
- Is the cost scalable to the number of users or collection size?

OTHER

- How large is the vendor's customer base? (may speak to company longevity)
- What kinds of people/ institutions use the vendor's product? Who makes up the bulk of the vendor's user profile? What kinds of users does the vendor target?
- How long has the vendor's product been on the market?

APPENDIX V: CMS COMPANY RESPONSES TO TASK FORCE QUESTIONNAIRE (AS RECEIVED)

Archivetech

<https://archivetech.net/>

- Open or closed source: Partly open
- Cloud based or server: Cloud based since 2001
- PC or Mac or both: ALL; Using browser, and in stand-alone version: using local browser
- # of users (unlimited, scalable): unlimited
- Collection types supported: (Yes or no)
 - Archive: YES
 - Art: YES
 - Artifact: YES
 - Library: YES
 - Natural history: Made to measure (like imports of thesauri)
 - Oral history: YES
- Add-ons available:
- Reporting:
- Loan management: YES
- Exhibition management: YES
- Contact management: YES
- Digital image & media: YES



- Tablet/smart phone friendly:
- Customization available: YES
- Training available: YES
- Organizations currently using the product(s):
 - see some at <https://archivetech.net/page/10/clients> and
 - users as supported by the Cultural Heritage foundation <https://culturalheritage.cc/engine?app=md&service=classmanager:7293&cmd=open&id=136>

ArtsystemsPro

www.artsystems.com/product/art-gallery-software-art-collection-management-software/

- Open or closed source: Closed
- Cloud based or server: Either (we have two versions -- cross-platform Pro on desktop and web-based Artsystem5, launched soon).
- PC or Mac or both: Both
- # of users (unlimited, scalable): unlimited -- licensed by seat or login
- Collection types supported: (Yes or no)
 - Archive: Yes
 - Art: Yes
 - Artifact: Yes
 - Library: Yes
 - Natural history: Perhaps
 - Oral history: Perhaps
- Add-ons available: Yes
- Reporting: Yes
- Loan management: Yes
- Exhibition management: Yes
- Contact management: Yes
- Digital image & media: Yes
- Tablet/smart phone friendly: Yes (new web version)
- Customization available: Yes (limited)
- Training available: Yes
- Organizations currently using the product(s):
 - See <https://www.artsystems.com/company/clients/collection-software-clients/>



Axiell Collections

<https://alm.axiell.com/>

- Open or closed source: EMu operates on a proprietary software called Texpress.
- Cloud based or server: currently only server based for North American customers.
- PC or Mac or both: PC, but can connect from Mac with the use of Citrix client.
- # of users (unlimited, scalable): All Axiell products operate on a concurrent user license model which is charged per license and is scalable in nature. Site licenses are available – these are charged at a premium
- Collection types supported: (Yes or no)
 - Archive: yes
 - Art: yes
 - Artifact: yes
 - Library: yes – non-circulating.
 - Natural history: yes
 - Oral history: yes – full multimedia support
- Add-ons available: yes
- Reporting: yes
- Loan management: yes
- Exhibition management: yes
- Contact management: yes
- Digital image & media: yes
- Tablet/smart phone friendly: in conjunction with add on product
- Customization available: yes
- Training available: yes
- Organizations currently using the product(s):
 - You can view a list of our customers on our website here:
<https://alm.axiell.com/customers/customer-list/>

Collection Harbor

<https://collectionharbor.com/>

- Open or closed source: Closed
- Cloud based or server: Cloud based
- PC or Mac or both: Both
- # of users (unlimited, scalable): Unlimited, Scalable
- Collection types supported: (Yes or no)
 - Archive - Yes



- Art - Yes
- Artifact - Yes
- Library - Yes
- Natural history - Yes
- Oral history - Yes
- Add-ons available: Yes, custom features available at custom pricing, including web-based publishing.
- Reporting: Yes, custom reports available as standard feature
- Loan management: Yes, available as standard feature
- Exhibition management: Yes, available as standard feature
- Contact management: Yes, available as standard feature
- Digital image & media: Yes, available as standard feature
- Tablet/smart phone friendly: Yes
- Customization available: Yes
- Training available: Yes, included in all plans.
- Organizations who are currently using your product(s):
 - New to market as of February 2019.

CollectiveAccess

www.collectiveaccess.org/

- Open or closed source: CollectiveAccess is open-source collections management and presentation software designed for museums, archives, and special collections also increasingly used by libraries, corporations and non-profits. It is designed to handle large, heterogeneous collections that have complex cataloguing requirements and require support for a variety of metadata standards and media formats. CollectiveAccess is a collaboration between Whirl-i-Gig and partner institutions in North America and Europe with projects in 5 continents. The software is freely available under the open source GNU Public License, meaning it's not only free to download and use but that users are encouraged to share and distribute code.
- Cloud based or server: CollectiveAccess can be run locally, on your institution's intranet. Or it can be hosted in the cloud, either through Whirl-i-Gig, or with a third party hosting provider that can accommodate the server requirements of the software. Details regarding Whirl-i-Gig's hosting options can be found here:
<https://collectiveaccess.org/hosting>
If you're hosting on your local server or with another hosting provider, you'll need to bear the following in mind. The basic requirements for Providence include at least 1gig of memory for typical uses and small media, adequate data storage to accommodate your media, and any modern CPU. Linux, Windows (Server 2003, Server 2008, Windows XP



and Windows 7 verified to work), Solaris 9+, and Mac OS X 10.5+ are all acceptable operating systems

- PC or Mac or both: Both
- # of users (unlimited, scalable): CollectiveAccess was built to accommodate collections at arbitrarily large sizes and has been successfully deployed for collections containing well over 300,000 files and/or records. Speed and performance is entirely dependent on the adequate provisioning of server infrastructure and the quality of available networks. It is crucial that the chosen server is configured with adequate CPU, memory and storage. The same applies with regards to the number of users. The only limitation to the number of users is server performance; as long as your servers are appropriately specced, there is no limit to the number of users. And of course, being open source and free, there are no related licensing fees to worry about!
- Collection types supported: The flexibility of CollectiveAccess makes it a great choice for a variety of organizations, particularly those wishing to illustrate relationships between different types of records. In addition to supporting different metadata standards, it also accommodates an array of external data sources and services such as the Library of Congress Subject Headings, the Getty Art and Architecture Thesaurus, Google Maps, and other descriptive and geospatial services. It can also handle a broad spectrum of digital media formats. As a result, it can accommodate traditional library collections as well as more idiosyncratic collections. The focus of a collection need not be objects - CollectiveAccess could center on exhibitions, collections, entities, etc. depending on your project's needs. It also supports a wide variety of metadata standards (or a custom combination of your choosing). Examples of organizations that have benefitted from CollectiveAccess include art museums, historical societies and museums, institutional archives, mixed collections, film archives, natural history archives, fine art collections, and more. Because it is a web-based system, CollectiveAccess is also useful for projects that need to be accessed remotely by multiple users. Furthermore, because it includes an optional front-end application, CollectiveAccess is an excellent choice for organizations wishing to offer public access to collections.
- Add-ons available: The two main components of CollectiveAccess are Providence, the core cataloguing and data management application, and Pawtucket, an optional "front-end" publication and discovery platform. Providence provides a relational approach to cataloguing that allows users to create and describe relationships between different record types, and construct hierarchical relationships for complex collections. Nuanced search and browse tools, advanced display and reporting tools, batch edit and import capabilities, superior media-handling and more enable users to catalogue almost anything. For publicly accessible collections, Pawtucket offers the web presentation tools that can bring an archive to light. Highlights of the many features available to CollectiveAccess users can be found here: <https://collectiveaccess.org/features>
- Reporting – Yes



- Loan management - Yes
- Exhibition management - Yes
- Contact management – Please note: CollectiveAccess does not have a specific module for membership records. However, as a general database for all sorts of people and organizations, it could include contact management, too. But it's not designed specifically as a membership database.
- Digital image & media - Yes
- Tablet/smart phone friendly: For the front end (Pawtucket), CollectiveAccess is tablet and smart phone friendly. Because of the nature of our users' work, the back end (Providence) is not tablet and smart phone friendly. Given the complexity typically associated with cataloging, our users don't usually catalog "on the fly".
- Customization available - see above re configuration
- Training available: yes
- Organizations currently using the product(s):
 - Examples of organizations that have benefitted from CollectiveAccess include art museums, historical societies and museums, institutional archives, mixed collections, film archives, natural history archives, fine art collections, and more. Because it is a web-based system, CollectiveAccess is also useful for projects that need to be accessed remotely by multiple users. Furthermore, because it includes an optional front-end application, CollectiveAccess is an excellent choice for organizations wishing to offer public access to collections.
 - For specific examples, please see <https://collectiveaccess.org/projects>
<https://collectiveaccess.org/clients>
https://docs.collectiveaccess.org/wiki/Public_sites_using_CollectiveAccess

Collector Systems

www.collectorsystems.com/index.html

- Open or closed source: Collector Systems (CS) is a propriety closed source software as a service application.
- Cloud-based or server: CS is a fully cloud-based system
- PC or Mac or both: CS will work on any browser and therefore works on all platforms including PC and MAC.
- # of users (unlimited, scalable): CS can handle unlimited users and has infinite scalability
- Collection types supported: (Yes or no)
 - Archive - Yes
 - Art - Yes
 - Artifact - Yes
 - Library - Yes



- Natural history - Yes
 - Oral history - No
- Add-ons available: Yes
- Reporting: Yes
- Loan management: Yes
- Exhibition management: Yes
- Contact management: Yes
- Digital image & media: Yes
- Tablet/smartphone friendly: Yes
- Customization available: Yes
- Training available: Yes
- Organizations who are currently using your product(s):
 - South Street Seaport Museum, New York
 - Stearns History Museum, Minnesota
 - Riverside Art Museum, California
 - Nodaway Valley Historical Museum
 - Masterworks Museum of Bermuda Art
 - City of Tacoma, Washington
 - University of New Hampshire
 - University of Hartford, Connecticut
 - University of Texas, San Antonio
 - Eastern Connecticut State University
 - Fullerton Museum of Art, California State University

Gallery Systems

www.gallerysystems.com/

- Open or closed source: Gallery Systems operates on an Open Access policy. All users of our solutions can freely and openly access/export their data on command. We have a larger community which openly shares report generations, data models, system configurations, all encourages through our company and the cultural community.
- Cloud based or server: Gallery systems offers both cloud bases and server-based solutions.
- PC or Mac or both: Gallery Systems application is supported on both MAC and PC.
- # of users (unlimited, scalable): Gallery Systems supports a concurrent user level and well as an unlimited user level model.
- Gallery Systems supports collection type:
 - Archive: YES



- Art: YES
- Artifact: YES
- Library: YES
- Natural history: YES
- Oral history: YES
- Add-ons available: YES
- Reporting: YES, both SSRS and Crystal reporting functions
- Loan management: YES
- Exhibition management: YES
- Contact management: YES
- Digital image & media: YES
- Tablet/smart phone friendly: YES
- Customization available: YES
- Training available: YES
- Organizations currently using the product(s):
 - Gallery Systems supports over 800 clients worldwide. Among our list of clients there are over 200 institutions willing to share their names.
 - The Smithsonian
 - New York Historical Society
 - Chicago History Museum
 - City of Tempe History Museum

History IT

<https://platform.historyit.com/>

- Open or closed source: Proprietary based on open source software
- Cloud based or server: Cloud based
- PC or Mac or both: Platform agnostic
- # of users (unlimited, scalable): Basic (5), Standard (10), Advanced (15), Pro (Unlimited)
- Collection types supported: (Yes or no)
 - Archive: Yes
 - Art: Yes
 - Artifact: Yes
 - Library: Yes
 - Natural history: Yes
 - Oral history: Yes
- Add-ons available: Yes
- Reporting: Yes
- Loan management: Coming very soon



- Exhibition management: Coming very soon
- Contact management: No, coming
- Digital image & media: Yes
- Tablet/smart phone friendly: Yes
- Customization available: Yes
- Training available: Yes
- Organizations currently using the product(s):
This is a representative sample.
 - University of Indianapolis
 - Osher Map Library and Smith Center for Cartographic Education
 - New Albany Floyd County Public Library
 - Historical Society of Washington, D.C.
 - Historic Annapolis
 - Evanston History Center
 - Pro Rodeo Hall of Fame
 - Great American Songbook Foundation
 - Kappa Kappa Gamma
 - Sigma Alpha Epsilon
 - University Presbyterian Church of Austin
 - First United Methodist Church of Evanston

Keepthinking

www.keepthinking.it/qi-the-universal-content-management-solution

- Open or closed source: Closed
- Cloud based or server: Cloud based
- PC or Mac or both: Both
- # of users (unlimited, scalable): Unlimited
- Collection types supported:
 - Archive: Yes
 - Art: Yes
 - Artifact: Yes
 - Library: Yes
 - Natural history: Yes
 - Oral history: Yes
- Add-ons available: Yes
- Reporting: Yes
- Loan management: Yes
- Exhibition management: Yes



- Contact management: Yes
- Digital image & media: Yes
- Tablet/smart phone friendly: Yes (we also have a movement control app).
- Customization available: Yes
- Training available: Yes
- Organizations currently using the product(s):
 - USA/Canada**
 - Dia Art Foundation: Collections management, website, shop
 - Shaker Museum: Collections, archive and library management
 - Asia Society: Collections management, online collections website
 - Kramlich Collection: Collections management
 - Clyfford Still Museum: Archive and Collections Management
 - University of St Thomas: Collections Management, Website
 - Arizona State Museum: Collections Management, Website
 - City of New York: Collections Management, Website
 - Confederacy of Mainland Mi'kmaq (Canada): Collections Management
 - UK**
 - Lloyds Register: Collections management, website
 - Fleming Collection: Collections management, website
 - Sainsbury Archive: Archive management, website
 - British Council: Website, Collection, Archive, Library
 - Shakespeare Birthplace Trust: Archive, library, collection, event management, website
 - White Cube Gallery: Collections management, website
 - Courtauld Institute of Art: Archive management, website
 - Ashmolean Museum: Multiple website management, collections online
 - Horniman Museum: Website, Collections Online, Intranet, Tickets, Membership
 - William Morris Gallery: Website, Collections Management
 - Wedgwood Museum: Website, Collections Management, Archive Management
 - The Burlington Magazine: Website, Library management, Archive management, Shop
 - Art UK: Collections management and multiple websites
 - Paul Mellon Centre: Collections management and multiple websites
 - House of Illustration: Website, Shop, Collections Management
 - Mucha Foundation: Website, Collections Management
 - Pallant House Gallery: Collections Management
 - GlaxoSmithKline: Archive Management and website
 - Private collections (under NDA): Collections Management
 - Burg House Museum: Collections Management and website
 - De Lazlo Archive Trust: Collections Management and website



- Holkham Hall: Collections Management
- University of Oxford: Collections Management and website with crowdsourcing
- Fitzwilliam Museum: Website
- Artist Collecting Society: Collections Management
- Contemporary Art Society: Collections Management
- Sephardi Collection: Collections Management

Hong Kong

- Asia Art Archive: Archive and website management - multilingual
- West Kowloon Cultural District: Website management - multilingual
- K11 Art Foundation: Collections Management System

Rest of the world

- Media Majlis (Qatar): Collections management, website
- Diva Museum (Belgium): Collections Management and website
- Charlie Chaplin Archive (Italy): Archive Management, Website
- Flander Region (Belgium): Collection and Archive Management
- Olafur Eliasson (Germany): Collections Management
- Dubai Expo 2020 (UAE): Collections and Archive Management

Lucidea

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

- Open or closed source: Closed source
- Cloud based or server: Cloud based
- PC or Mac or both: Both
- # of users (unlimited, scalable): Unlimited (limited administrators)
- Collection types supported: (Yes or no)
 - Archive: yes
 - Art: yes
 - Artifact: yes
 - Library: yes
 - Natural history: yes
 - Oral history: yes
- Add-ons available: Out of the box solution, all modules will be included.
- Reporting: yes
- Loan management: yes
- Exhibition management: yes
- Contact management: yes
- Digital image & media: yes



- Tablet/smart phone friendly: yes (web-based, works on all devices with browser/internet connection)
- Customization available: yes
- Training available: yes
- Organizations currently using the product(s):
 - History Colorado
 - Denver Art Museum
 - TriMet
 - For an extended list, speak to a product specialist.

Lyrasis

www.collectionspace.org/

- Open or closed source: Open source
- Cloud based or server: Either, depending on institutional preference. CollectionSpace can be installed on in-house servers, on cloud-servers controlled by the implementing institution, or on cloud servers controlled by a third-party hosting service.
- PC or Mac or both: Both
- # of users (unlimited, scalable): Unlimited
- Collection types supported: (Yes or no)
 - Archive - Partial
 - Art: Yes
 - Artifact: Yes
 - Library: Partial
 - Natural history: Yes
 - Oral history: Yes
- Add-ons available: Yes
- Reporting: Yes
- Loan management: Yes
- Exhibition management: Yes
- Contact management: Yes
- Digital image & media: Yes
- Tablet/smart phone friendly: Tablet yes, Available but not optimized for smart phones
- Customization available: Yes
- Training available: Yes
- Organizations currently using the product(s):
 - Ohio History Connection
 - Oakland Museum of California
 - Hearst Museum of Anthropology



- Litchfield Historical Society
- Birthplace of Country Music
- Plimoth Plantation
- Longer list available online: <http://www.collectionspace.org/who-we-are/>

Minisis Inc.

<http://www.minisisinc.com/index.html>

- Open or closed source: We were the first open source software in 1972 and that model continued until 1999. So we have clients that have some open source versions, but we don't track that nor care that much about those versions any more. We are officially now, proprietary. We would not use the term closed as (yes, we have implemented an impenetrable shell around our software but...) users can use APIs, DCOM, SOAP, etc. for integration and manipulation with our products and other 3rd party products. The Software comes with a DBMS included, an application (e.g.: M3 our CMS) and a web interface.
- Cloud based or server: Both are possible.
- PC or Mac or both: Depends on whether it's on-premise or hosted configuration... and it depends which versions (web or desktop). The DBMS and CMS are designed for PC/Windows. The client can use parallels or citrix...on the Mac. Web version is o/s agnostic and is functional on every major browser (e.g.: Safari, Chrome, FireFox, IE/EDGE).
- # of users (unlimited, scalable): Our largest user has 200 unique user profiles. Over a 100,000 registered 'patrons' with their own accounts and open access online to guests. As well that client has over 9,000,000 catalogue/descriptive records. Honestly, we cannot say what the limit is as we have never hit a client maxing out the limits. It is difficult to know as not all records have the same data or amount of data, some have media files and so on. Therefore to say "here's the limit" is practically impossible to tell. And even if the databases hit a limit, the client can link databases together in a daisy chain or networked format so that any limit can be negated. It should be mentioned that the web or OPACs are scalable and only as good as your IT/ISP/Network/Internet bandwidth.
- Collection types supported: (Yes or no)
 - Archive: Yes
 - Art: Yes
 - Artifact: Yes
 - Library: Yes
 - Natural history: Yes
 - Oral history: Yes
- Add-ons available: Yes



- Reporting: Yes
- Loan management: Yes
- Exhibition management: Yes
- Contact management: Yes
- Digital image & media: Yes
- Tablet/smart phone friendly: Yes
- Customization available: Yes
- Training available: Yes
- Organizations currently using the product(s):
 - Historic New Orleans Collection
 - City of Ottawa
 - Rhode Island Historical Society
 - Adler Planetarium
 - City of Toronto Museums
 - National Centre for Truth and Reconciliation
 - Otago University

Mukurtu

<http://mukurtu.org/>

- Mukurtu is a mobile, open source platform built with Indigenous communities to manage and share digital cultural heritage.
- Mukurtu was not asked to answer the questions posed to other companies because it is unique in the cultural focus and is not easily comparable.

PastPerfect Software Inc.

www.museumsoftware.com/pp5.html

- Open or closed source: closed
- Cloud based or server: server
- PC or Mac or both: PC
- # of users (unlimited, scalable): scalable
- Collection types supported: (Yes or no)
 - Archive: yes
 - Art: yes
 - Artifact: yes
 - Library: yes
 - Natural history: yes



- Oral history: yes
- Add-ons available: yes, they currently have Multimedia, Networking, Barcode Printing, PastPerfect Online, Nomenclature 4.0, Virtual Exhibit, and Annual Support.
- Reporting: yes
- Loan management: yes
- Exhibition management: yes
- Contact management: yes
- Digital image & media: yes, as an optional feature
- Tablet/smart phone friendly: PastPerfect 5.0 is not designed to work on tablets or smartphones since it requires a Windows operation system and wired network connection, but PastPerfect Online (the optional research tool they use) is.
- Customization available: custom fields and reports are available
- Training available: yes
- Organizations currently using the product(s):
 - Our client list can be found here: www.museumsoftware.com/clientlist.html (please note this is an opt-in list)

Re:discovery Software

<https://rediscoverysoftware.com/>

- Open or closed source: Proficio and Proficio Elements are traditional licensed software. Our internal developers take feedback from clients and our team internally to make updates.
- Cloud based or server: Both and you can move between as your budget allows.
- PC or Mac or both: Both in the Cloud
- # of users (unlimited, scalable): Proficio is unlimited and Proficio Elements is up to five
- Collection types supported: (Yes or no)
 - Archive: Yes
 - Art: Yes
 - Artifact: Yes
 - Library: Yes
 - Natural history: Yes
 - Oral history: Yes
- Add-ons available:
- Reporting: Included
- Loan management: Included
- Exhibition management: Included
- Contact management: Included
- Digital image & media: Included



- Tablet/smart phone friendly: Yes
- Customization available: Yes
- Training available: Yes - We provide a basic webinar, a rotating topic training webinar and then record them for a training video library our clients can access. We have a support team available by phone and email to answer technical and how to questions. There is also an extensive manual in the CMS itself. One of the Re:discovery team members can come on site at an additional cost.
- Organizations currently using the product(s):
 - U.S. Department of the Interior
 - Museum of History & Industry
 - Museum of Flight
 - Concord Museum
 - North Carolina Museum of History
 - Monticello
 - Mary Baker Eddy Library
 - The Bruce Museum
 - The Mariners' Museum
 - Muscarelle Museum of Art
 - Museum of Indian Arts & Culture
 - Casemate Museum
 - Daughters of the American Revolution
 - Chickasaw Cultural Center
 - National Archives (Exhibit Programs)
 - American Medical Association
 - Bostonian Society
 - Science Museum of Minnesota
 - The Johnson Collection
 - U.S. Diplomacy Center
 - Museum of Russian Icons
 - Rotch-Jones-Duff House
 - The Mob Museum
 - Episcopal Diocese of Olympia

SKINsoft

www.skinsoft.org/

- Open or closed source: Closed source
- Cloud based or server: Cloud based
- PC or Mac or both: Both



- # of users (unlimited, scalable): the number of users can be extended with no limits depending on the needs (our solution can support an unlimited number of users)
- Collection types supported: (Yes or no)
- Archive: YES
- Art: YES
- Artifact: YES
- Library: YES
- Natural history: YES
- Oral history: YES
- Add-ons available: YES
- Reporting: YES
- Loan management: YES
- Exhibition management: YES
- Contact management: YES
- Digital image & media: YES
- Tablet/smart phone friendly: YES
- Customization available: YES
- Training available: YES
- Organizations currently using the product(s):
 - Over 150 institutions including:
 - the Louvre-Lens
 - the Luma Foundation
 - the Fenimore Art Museum
 - the Farmers' Museum
 - the British Council
 - the Cinematheque Suisse (Swiss Film Archive)
 - the Rodin Museum
 - the Musee des Arts Decoratifs
 - the French Ministry of Foreign Affairs
 - the French Ministry of Armed Forces

Vernon Systems Ltd

<http://vernonsystems.com/products/vernon-cms/>

- Open or closed source: closed
- Cloud based or server: server
- PC or Mac or both: PC
- # of users (unlimited, scalable): scalable



- Collection types supported: (More than 60% of our users manage more than one collection type)
 - Archive: Yes
 - Art: Yes
 - Artifact: Yes
 - Library: Yes
 - Natural history: Yes
 - Oral history: Yes
- Add-ons available: Yes
- Reporting: Yes
- Loan management: Yes
- Exhibition management: Yes
- Contact management: Yes
- Digital image & media: Yes
- Tablet/smart phone friendly: No. Access via remote desktop. Not customized for Tablet/smart phone
- Customization available: Yes
- Training available: Yes
- Organizations currently using the product(s):
 - [Vernon CMS Client List](#)

Zetcom

www.zetcom.com/en/

- Open or closed source: MuseumPlus software is comprised of many open source components, but is a proprietary software package.
- Cloud based or server: Either hosted SAAS or on-premises is possible
- PC or Mac or both: As a true web-based product, MuseumPlus may be accessed 24/7 via any browser, on either a PC or a Mac.
- # of users (unlimited, scalable): unlimited
- Collection types supported: (Yes or no)
 - Archive: Yes
 - Art: Yes
 - Artifact: Yes
 - Library Special Collections: we do not handle circulation though cataloguing collection-related library materials is supported
 - Natural history: Yes



- Oral history: Yes
- Add-ons available: Clients may use our API to integrate with third party software.
- Reporting: this is standard, no Add-on required.
- Loan management: yes
- Exhibition management: yes
- Contact management: yes
- Digital image & media: Yes
- Tablet/smart phone friendly: HTML5, yes
- Customization available: yes
- Training available: yes
- Organizations currently using the product(s):
 - We have 950 clients worldwide, please contact us for more information.

To access the full leaflet, please visit the AASLH Online Store at aaslh.org.