How to prepare for a collection management system

If you think your organisation would benefit from adopting a collection management system, there are a number of things you need to assess.

1. Check all your existing collection documentation

Your existing collection documentation will be what you input into your new system. You need to make sure it is comprehensive and to an adequate and consistent standard before you put it into your system.

To check your existing documentation you could ask the following questions:

- What listings do you currently have?
- What listings do you not have?
- Are your lists legible, accurate and understandable?
- Do all your digital images have good titles?
- Do all records have date ranges?
- Is there adequate information about who created and managed your records?
- Are there any types of information missing that you will need to research or develop before the lists can be input into the system?

2. Think about your collection management information

Collection management information will need to be input as rules or explanatory information into your database.

To assess whether your management information is adequate and able to be loaded into an archival control system you could ask questions like:

- Do know how and where your all your records are stored?
- Do know what all your access and security rules are?
- Do you have information about any relevant disposal authorities that you need to apply?
- Do you know where to find all relevant preservation or maintenance information?
- Do you know where any loan or exhibition information is?

3. Think about how you want your information to be arranged (structured) and used

You need to have a good idea about how you want your system to operate. Exactly what do you want the system to contain and describe? Do you want it to just list all your items, or contain information about series or people too?

You could ask yourself questions like:

- do you use record series?
- do you use record groups?
- do you arrange your archives based on who created them?
- do you arrange your archives based on who donated them?
- how do you want to connect your collections – through people, through dates, through organisations, through business activities?
- do you want to connect to other related archives and collections

All of these types of issues will determine how your system will be structured, what information you will put in, what information your users will be able to get out, and what system functionality you will and won't use.

4. Think about how you think your users would like to access your collection

Again, these types of issues will help to determine the type of system you should implement. You could ask questions like:

- what are users' current search strategies like?
- what would you like to improve?
- what would you like to maintain?
- what collections or parts of collections would you like to improve access to?
- do you want to create indexes to geographic areas or prominent people and link your holdings to these?

Thinking about questions like these will help you to design a system that is as user-friendly and as appropriate as possible.

5. Talk technicalities

Look at the systems you are considering and see how they might operate with your current systems and technical environments.

- Are there any technical limitations that might affect the type of system you can choose?
- Do you have an implementation budget?
- Who can provide you with basic technical support? Remember, that with open source software there is generally good help available online

The best technical advice however is to start playing with your chosen software and see how you go!

6. Plan for the future

To plan for the future make sure you:

- Develop backup facilities – you don't want to lose all your hard work!
- Keep records of how you have designed and set up the system as this will help you to manage any migrations you might need to undertake in the future
- Monitor and assess the system to see how it can be improved
- Develop procedures around how new information should be input into the system to ensure continuity and consistency
- Run regular reports as content is updated to ensure your finding aids are up to date
- Liaise with other related bodies to share tools and tips

Dr Kate Cumming
State Records NSW