Considerations for selecting a collections management system

- Establish institutional <u>motivation</u> to digitize specimens
  - earnest desire could be generated by a focus group with institutional stakeholders, funding generators, users of data, people who input data, data system supporters (curators), IT,

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- Document and agree on a priority feature set that is <u>necessary</u> versus <u>desired</u>:

  a. system is extensible, customizable,

  b. responsive vendor,

  c. supports reports, auditing,

  d. generates labels,

  e. supports loans (partial returns, cataloged and uncataloged specimens),

  f. supports pest management,

  g. supports multimedia attachments (PDF loan forms, image, sound files, etc.),

  h. supports web access and privacy,

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i.   all the input/output scenarios you might envision:
   - Import/export abilities, can be taught DarwinCore
   - plan B scenario if software or the internal project becomes unfunded,

j.   affordable user license costs,

k.   has basic, and easily customizable help,

l.   Mac versus PC, perhaps an issue in your user population,

m.   has a robust security model (passwords, users, groups, permissions, input and query defaults, controlled vocabularies),

n.   supports accessibility, different character sets,

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- Proprietary, open source, hybrid, cloud-based – who does maintenance, feature development,

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- Interest in having what your peers have: economies of training, user community,

- Beware of demo-ware,

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- Shop vendors and score them on their ability to meet <u>necessary</u> features above, with extra points for <u>desired</u> ones,

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- Get a full demo copy and enter data with a <u>realistic</u> test case dataset, score on ease of learning the system,

Considerations for selecting a collections management system

- When choosing preferred system, consider <u>costs</u> derived from these sources:

1. upfront software costs,
2. software maintenance,
3. long term costs (server space, server replacement, backup),
4. where it is hosted,
5. IT support of system without being the bottleneck,
6. hidden costs of conversion, cleansing, improvements,
7. institutional bioinformatics staff support to continue development of data, ('data curator').