



Considerations for selecting a collections management system

J. McCaffrey
iDigBio Biodiversity Informatics Manager

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Considerations for selecting a collections management system

- Establish institutional motivation 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,



Considerations for selecting a collections management system

- Document and **agree** on a priority feature set that is necessary versus desired:
 - 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,



Considerations for selecting a collections management system

- i. all the input/output scenarios you might envision:
 - Import/export abilities, can it support DarwinCore field mappings
 - plan B scenario if software or the internal project becomes unfunded,
- j. affordable user license costs: per seat, pool,
- 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,



Considerations for selecting a collections management system

- Proprietary, open source, hybrid, cloud-based
 - Who decides what features to develop?
 - Who does maintenance?



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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 necessary features above, with extra points for desired ones,



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



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When choosing preferred system, consider costs 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').

<https://www.idigbio.org/content/biological-collections-databases>