



CollectionsIndex+ Service Definition

v2.1 – April 2024

System Simulation

<https://collectionsindex.com>

Collections management with CollectionsIndex+

CollectionsIndex+ is a mature collections management system that is in use in a wide range of public, third-sector, and commercial organisations and covers all sizes of collections from local museums and specialist corporate archives to global organisations. It will provide a sound platform for cataloguing and managing your collections. CollectionsIndex+ has a full set of supporting features including a workflow management system that can be configured to guide your users through your processes and practices, creating proper documentation and ensuring that steps are carried out correctly and by the right people. CollectionsIndex+ includes comprehensive support for non-Western character sets such as Arabic and Cyrillic, making it the ideal choice for management of international collections.

CollectionsIndex+

CollectionsIndex+ consists of a range of optional collections modules, each of which addresses a specific area of collections management need.

The CollectionsIndex+ **Objects Module** provides full-strength, standards-based, professional management of curated object collections. The CollectionsIndex+ object collections module manages collections in a wide range of organisations, and covers all sizes of collections from local museums and specialist corporate archives to global organisations such as the British Museum and Foster+Partners. The object module is fully Spectrum-compliant. The high level of detail in Spectrum is managed by using the CollectionsIndex+ *View Manager*, which allows you to control which fields are displayed and how they are organised on the screen and in search forms. The View Manager is simple to use and gives users and administrators great control over the feel of the system.

The CollectionsIndex+ **Archive Module** provides professional cataloguing and management of archives to the ISAD(G) and ISAAR(CPF) specialist archiving standards. Archives catalogues are held in hierarchies including fonds, sub-fonds, series, items, and any number of levels can be represented. Parts of the catalogue can be moved around by simple drag-and-drop operations making maintenance of the hierarchy very easy.

The CollectionsIndex+ **Books Module** provides a bibliographic cataloguing system for professional library cataloguing and management. The CollectionsIndex+ books module is based on MARC/MARC21 and AACR2 standards and is particularly suited to managing historic book collections.

The CollectionsIndex+ **Film Module** supports the management of film archive collections, following the approach of the FIAF Moving Image Cataloging Manual and drawing on the structures of EN15907, with its model of Works, Manifestations and Items. A record hierarchy is established, the Work being the parent of one or more Manifestation records, and the Manifestations being the parents of one or more Items. A Work record with type 'serial' can have multiple related works, each represented by their own Work record. It is fully integrated with the Spectrum procedures for managing the physical collection.

CollectionsIndex+ has good support for image handling. The **Image Acquisition Pipeline** is included for importing images into the system. It automatically creates a record for each image and populates it with any available metadata. It also creates an image pack of image renditions at different sizes: thumbnail, medium and full resolution versions. converting image formats, creating thumbnails and compressed renditions, etc. Images can be used in many places: attached to objects, parts of objects, specific fields, or for illustrating procedures (before/after conservation photography, or photographs of an object or painting being placed on display, for example).

The **Extended Media Option** extends CollectionsIndex+'s image handling and allows you to use a wide range of file types including video, audio and other document types, in addition to the built-in image support. Alternatively, to support the management of images and other digital assets in their own right, we offer our digital asset management system, AssetIndex+.

AssetIndex+ is a full-featured digital asset management system providing secure storage and management of your images, videos, sound files, 3D scans, documents, and any other digital assets. AssetIndex+ comes with an *efulfilment* system which manages the processes of users – internal or external – getting access to your assets in a properly controlled way. At its simplest e-fulfilment allows assets to be retrieved with a single button press. With our optional e-commerce module, the capabilities of the system are extended to support dialogues with the user about the intended use of the assets, carry out e-commerce or off-line payment, issue licences, and provide download facilities with click-through terms-and-conditions notification.

CollectionsOnline brings your collections to the web. You can use this for public access to your collection. It is also often the perfect answer for allowing wider access to the system from colleagues within your organisation. This can be of use in marketing and promotional work, visitor information, exhibition planning, and other such functions. You have complete control over which items are visible on the web site and which items are not. CollectionsOnline is designed to be styled to match your organisation's look and branding and sit within your existing intranet or internet web presence. CollectionsOnline presents all the CollectionsIndex+ catalogues in a single site and allows cross-searching of the collections through simple and advanced search facilities.

The **Office Export** module supports the production of reports in Microsoft Word, Excel and CSV formats.

CollectionsIndex+ includes a full set of **Procedures** which allow you to record what you have done with your items: moved them, lent them, repaired, conserved or modified them, exhibited them, and so on. The Spectrum standard provides a good set of procedures designed to cover all the activities of physical object collections.

The CollectionsIndex+ **Workflow Engine** provides an optional layer of automation to your use of procedures, steering users through the procedures, alerting and prompting for information at the appropriate moment, ensuring sign-off regimes are followed, and the right decisions are made and recorded at the right times and by the right people.

Our services

Consultancy

We can undertake a business analysis or **Discovery** activity where we work with you to define the solution in more detail and set out and define the limits of the project providing a measure against which completion and success can be measured. The discovery phase enables unknowns and open-ended issues to be considered and resolved and allows account to be taken of the inter-dependencies between the different contributors to the project and the amount of time and resource that will be needed from all parties.

We offer a **Data migration** service, where we take your existing data, work in consultation with you to map it to the standards-based CollectionsIndex+ data structures, and load the data. This process can also provide opportunities to clean the data – we can carry out automated cleaning and work with you (or others such as volunteers) to get manual cleaning done as part of the migration.

We can work with you to capture your current procedures into the system, adapting existing CollectionsIndex+ procedures or creating new ones for specific tasks. We offer **Workflow Consultancy** to help define your workflows and tailor the workflow engine to understand the way you manage your collections.

We can carry out additional **Configuration** of the system to adapt it to your existing work practices and data standards. At its simplest, we can add a few fields or load up standard term-lists or thesauri. We are also pleased to undertake more substantial client-specific enhancements. We are proud of the long-term collaborative relationships that we have with many of our clients.

We also offer Web site design. The CollectionsOnline website is designed to be configured to take on your look and brand – making sure the basic colour scheme, font, menus, logos, page footer and so on look right for you. We include this work in our standard price and we can pick up the various design elements from your existing web site or any other reference you want to point us at. Beyond that, you may wish to carry out more extensive design work on the web site. We can work with your designers, in-house or external, or we can suggest designers who we've worked with in the past. The site can also be delivered through in-gallery kiosks, and these generally warrant specific design input.

More broadly, we can offer general collections consultancy services, to assist with collections management planning or tasks such as accreditation.

Training

We will deliver **Training** so that you can get going efficiently and make the best use of the system. We can train you at your site, remotely, or at our offices in London. Additional training is available at any time if you need a refresher or if you have new staff starting to use the system.

Support

Most customers choose to take our **Support** service. We'll be here to answer your questions and help you get the most out of the system. Our help desk is available between 09:30 and 17:30 UK time on all working days to provide advice and assistance on the operation of the software. We'll also be on hand when something goes wrong. Support is provided online and by email and telephone. If you take out a support contract, you'll also be entitled to software updates.

Hosting

We offer a **Managed Hosting** service: you can run all the software on your own computers, or we can run it for you on our managed hosting platform. Alternatively, you are welcome to select a third-party hosting service. Many organisations choose to host their collections management system and digital asset management on their own servers, and put any public-facing web sites on externally-hosted servers either with us or with a third party. Whatever you choose, you can change your mind in the future: you are welcome to host the software wherever suits you best.

The hosting platform provides the following service level:

- at least 99.9% network up-time
- local electricity generators in case of extended power failure
- at least 10Mbits/second internet connection
- un-metered traffic
- permanently staffed location
- multiple tier-1 internet connections
- resilient storage through monitored redundant RAID discs
- regular monitoring of the machine, web sites, applications and services

The server is configured with RAID storage. This provides redundant storage across multiple hard drives so that, in the event of any one drive failing, data is not lost and service can continue with minimal interruption while the failed drive is replaced.

The system is configured to receive regular automatic security updates to its operating system and software. A firewall is in place.

The health of the system is monitored by System Simulation via an alerting system.

System Simulation provides a backup service as part of the hosting arrangement. Incremental and full backups of the system are taken at regular intervals and stored online at a physically and administratively separate site.

Content will normally be backed up approximately every 24 hours. Backups are normally kept for a maximum of three months after which they are automatically removed.

Back-up and maintenance copies of the system software and configuration are held at System Simulation's offices.

System Simulation

System Simulation have had a long engagement with collections and document management, providing systems for leading institutions in the public, private, and third sectors for over 30 years. Our software has been under continual refinement and development throughout that period, culminating with the release of our latest generation, CollectionsIndex+, with a new workflow engine.

We have worked on major systems for clients of all sizes and capabilities including organisations such as The Victoria & Albert Museum, The British Museum, UK police forces, National Museums Northern Ireland, the BBC, BSkyB, RTÉ, The Royal Academy, The Royal Society, the Government Art Collection, the British Academy and National Galleries of Scotland. Our international clients include Islamic Arts Museum (Malaysia), the Chopin Museum (Poland), the Rock Art Research Institute (South Africa), Old Sturbridge Village (USA), Nova Scotia Museum (Canada) and major private collections in Europe and Asia. We have a record of long relationships with our customers, in some cases dating from the 1980s and 1990s.

System Simulation specialises in the heritage and memory systems, supplying standards-compliant products for museum documentation, archives cataloguing, bibliographic cataloguing, and document, image, and digital asset management. Our experience at all levels of the system stack gives us unique experience to integrate our components in with those of other suppliers where necessary.

We provide a full range of implementation services including system architecture design, data architecture, system configuration, implementation, integration, data migration and ingest, and user interface design and customization. We offer a full set of professional support and hosting services to help you get the most from our software systems.

System Simulation is a founding member of the Collections Trust's Spectrum Partners scheme.