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# INTRODUCTION TO DIGITAL CULTURAL HERITAGE MANAGEMENT PLATFORMS

## INTRODUCTION

This resource introduces the common types of software used by cultural heritage institutions to manage and provide access to content and collections and provides questions to ask when evaluating a platform. Evaluating potential platforms for use in a cultural heritage institution ensures that the selected system(s) will meet the specific needs of the organization. This document provides a context for understanding different types of systems available, and provides a starting point for evaluating your options.

Cultural heritage institutions implement a wide range of software to streamline the management of, and access to, their materials, whether those are individual items, or entire collections, and whether they need to be shared widely or not. There are platforms that meet the needs of libraries, archives, museums, and other institutions, each with their own requirements, features, considerations and uses. While terminology and usage varies, these platforms are often classified as collections management systems, content management systems, digital asset management systems, and more. Some of these platforms are very specialized to specific materials needs, while others find more widespread use across a range of fields.

In addition to access and management of materials it is important to ensure that digital resources are not only tracked and accessible (internally or with permissions as the case may be), but also preserved long term. The term “digital preservation” encompasses strategies, actions, and tools to keep digital files usable over time. This can include the use of digital preservation systems, including some of the platforms referred to here, but will require more planning and resources than the use of a single software or platform.

For more information and related resources, see the “[Databases and GIS](#)”, “[Technology and Tools](#)”, and “[Digital Preservation](#)” categories on the Sustainable Heritage Network.

- 2016 Post-ATALM Sustainable Heritage Network Workshop
- 2016 Post-ATALM SHN Workshop Part 4: Digital Preservation

## TYPES OF DIGITAL CULTURAL HERITAGE MANAGEMENT PLATFORMS

Different platforms emphasize different needs and uses. While some are focused on streamlining internal workflows for accessioning collections, they may also offer some degree of user access to materials. Similarly, while some platforms focus on the user experience and providing access to individual materials, they may include some internal tracking functionality. There are also some providers that offer complementary platforms that will work together seamlessly to deliver on multiple fronts.

In most cases, there is not one single platform that will meet all of your collections needs. Instead it is helpful to think of different tools needed to manage and maintain different aspects of your collections, from preservation to access. It is not unusual for an institution to implement a collections management system to process and internally track new collections and acquisitions, and then provide online access to some or all of those resources through a content management system that is more focused on the user or patron's needs. Ideally, these systems will work together, so take stock of all your collections needs, from acquisition to distribution, before committing to one single platform.

### **Collections Management Systems**

Collections management systems are most commonly used in archives and museums to manage the lifecycle of physical and digital materials within the institution, including managing unprocessed accessions, tracking processing workflows, and providing access to collections (often through finding aids).

Examples: [PastPerfect](#), [ArchivesSpace](#), [AtoM](#)

### **Content Management Systems**

Content management systems are used in a wider range of cultural heritage institutions, including libraries, and focus more on management, description, access, and use of digital materials and resources.

Note that the broad definition of content management systems is also applied to applications that are the basis for websites (eg: Wordpress).

Examples: [Mukurtu CMS](#), [Omeka](#), [Collective Access](#)

## Digital Asset Management Systems

Digital asset management systems are largely focused on organizing, storing, and delivering media assets. These platforms are often used to feed media into other systems, sites, or platforms, and may or may not include user-facing tools and resources.

Examples: [ContentDM](#), [ResourceSpace](#)

## EVALUATING PLATFORMS

As with any software equipment purchase, there are many factors that will influence your decision-making, including: cost, availability, features, technical support, and necessary functionality. Most institutions will use more than one platform to meet their collections, access and preservation needs. In order to make the best decision for your institution, contacting the developers and support services for platforms under consideration is one way to get more information about their specific features and functions. Institutions using these platforms are also often to share their experiences and decision making factors, reaching out to current or past users, either directly, or through professional organizations or listservs, can return valuable information as well.

Consider the sample questions below when assessing your needs and how each system meets them.

### Implementation and Cost

Cost is reflected in different ways for different systems. Cost to a software provider can include purchase cost, licensing fees, and support/training. Hosting costs may be paid to third parties, or could be borne internally using your own staff and resources.

- Purchase Cost and Licensing
  - Is there a one-time purchase charge? Does this include future version updates?
  - Are there ongoing (usual monthly or annual) licensing fees for continued use?
  - Is the software open source? If so, do you have the internal resources to support that? (see below for more)
- Training and Support
  - Is there free user support? How extensive is it?
  - Is there paid user support? How much does it cost?

- Is there a large user community? Do they provide any support?
- Are other related services offered? Eg: site customization, data migration, data recovery.
- System Requirements and Infrastructure
  - Do you have sufficient system resources and infrastructure to install and maintain the software? Most platforms require a server-level installation.
  - Do you have IT or system administrators on staff who can support the required installation?
  - If you are contracting hosting to a third party, budget for their installation and ongoing maintenance costs.
- Staff Resources
  - If you are self-hosting a platform, do you have IT or system administrators on staff who can support the required ongoing maintenance?
  - Do you have staff with the time needed to maintain and develop the content within the system, and provide user or patron support when needed?

## Features

The features provided by a platform help determine whether it meets your needs or not. This is also where most platforms distinguish themselves, and where specializations often surface. For example, most of the “project management” and “tasking” features below are common in archives-oriented collections management systems, but less common in patron-focused content management systems. Assess the features of each platform, don’t assume that for example, a collections management branded system will meet your specific collection needs.

- Technical and Administrative
  - Which metadata standard(s) are supported?
  - Is the metadata scheme customizable?
  - What kinds of import/export formats and workflows are supported?
    - Can they be automated?
  - Are feeds or API integration with other systems supported?
  - Is batch edit of records supported?
  - Which authority records or controlled vocabularies are supported?
  - Is the staff and administrator interface customizable?
  - Is differential access and permissions for administrators and staff supported?
- User Experience

- Is web publishing supported, or is it designed for internal use only?
- Is the user interface customizable?
- In the user interface easy to use? Appealing?
- Do users need specific hardware or software requirements to access?
- Is the web platform responsive or mobile friendly?
- Are multiple languages supported?
- Is differential access for users supported?
- Does the user interface comply with accessibility standards?
- Digital Preservation
  - Are any digital preservation tools included?
    - Creation and/or integration of checksums
    - Data validation
    - Version control
    - Automatic backups
  - Does the platform integrate with other digital preservation tools or workflows you already use?
- Project Management and Tasking
  - Can tasks be assigned to staff members?
  - Is there additional project management integration? Examples of common project management tasks include:
    - Loan or request management
    - Appraisals
    - Accessions
    - Deeds of Gift
    - Archival Processing
    - Donor Tracking
    - Reporting

## ADDITIONAL RESOURCES

- “The Collection Management System Collection”:  
<http://bits.ashleyblewer.com/blog/2017/08/09/collection-management-system-collection/>