A GUIDE TO CHOOSING A CMS

Documentary Heritage and Preservation Services for New York

WHAT IS A COLLECTIONS MANAGEMENT SYSTEM (CMS)?

A **collections management system (CMS)** is software that helps archives, museums, and similar organizations manage both the physical items in their collections and the information about them. A CMS organizes documentation, tracks the location and condition of items, supports staff communication, and can provide a platform for public access. Some systems also include a **digital asset management system (DAMS)** for handling digital files, though a DAMS alone is not designed to support broader collections management needs.

1. PREPARE

- **Determine goals, objectives, and requirements**
  - Define a project team and roles
  - Be realistic about what the CMS "must" do; prioritize your wish list

- **Understand and know your collections**
  - Consider the needs of the collection(s), as well as the people who use it

- **Clarify what you need your CMS to accomplish**
  - How will you use the data it stores — for reporting, tracking, or public access? Consider who needs to access it, both staff and the public, on-site and remotely?

- **Determine your technology needs and abilities**
  - Will the system be local, networked, or cloud-based? What are your back-up storage options? Who will maintain this system (and how much training do they need)?

2. DO THE LEG WORK

- **Identify potential CMS companies**
  - Use others' experiences to guide your questions, not to make your overall decision; focus on your most important needs

- **Download or ask for demonstration versions to test**
  - Check usability, reporting features, and compatibility with your institution's workflows

- **Interview the CMS vendors on your short list**
  - Ask about system requirements, user options, and total costs, including software, hardware, training, setup support, and annual maintenance

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3. MAKE IT HAPPEN

- **Choose the CMS software**
    - Assign a project leader from your organization

- **Prepare to transfer your data**
    - Decide what information goes in each CMS field and what's visible to the public
    - Ensure the type of information entered in each field is consistent

- **Transfer process**
    - Develop a cataloging manual to guide consistent data entry
    - Update related policies and procedures to reflect the new system

- **Set up workflows**
    - Train users, gather feedback, and assess staff and patron usability

- **Maintain the system**
    - Ensure maintenance and backup responsibilities are clearly assigned
    - Schedule regular system updates and data backups
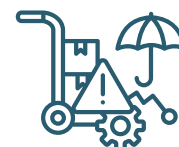
Remember: This is an investment you will live with for years to come. It should increase access to collections information for all. People are crucial and the technology must support them (not the other way around). Put the work in now to save work time later.

Additional Resources

- DHPSNY webinar: **Collections, Catalogs, and Clouds: How to Choose a Collections Management System**
- Margot Note, *The Archivists' Advantage: Choosing the Right Collections Management System*. LucideaPress, 2020.
- AASLH, Technical Leaflet 286: Choosing a Collections Management System, 2019. (Accessible to AASLH members only.) **Appendix** with "Questions to ask a CMS Company" and "CMS Company Responses to Task Force Questionnaire."

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