

## iDigBio Collection Management System (CMS) Information Gathering

Thank you for taking the time to consider and respond to the following questions. iDigBio will make your responses available to the natural history collections community, both as an online resource available to anyone, and as a reference specifically for participants in our “Introduction to Biodiversity Specimen Digitization” course. This resource will serve as an update to a similar survey we did in 2012: <https://www.idigbio.org/content/biological-collections-databases>.

Please return your completed survey to Erica Krimmel ([ekrimmel@fsu.edu](mailto:ekrimmel@fsu.edu)).

### BASIC QUESTIONS

1. **Name and email of person responding to this survey:** Seth Kaufman
2. **Name of Collection Management System (CMS):** CollectiveAccess
3. **Website:** <https://collectiveaccess.org>
4. **Company or group responsible for maintaining CMS:** Whirl-i-Gig
5. **Long-term funding structure for maintaining CMS (e.g., grants, membership, private):** grants, user-funded projects
6. **Brief summary highlighting the market niche for this CMS:** CollectiveAccess is a highly configurable collections management system suitable for use in a wide range of disciplines, from anthropology to art history to paleontology to corporate archives. CollectiveAccess includes a range of preconfigured “profiles” for various use cases and standards, including DarwinCore, SPECTRUM and VRA.

### USABILITY QUESTIONS

7. **Restrictions on types of collection objects and/or disciplines (e.g., cannot handle anthropology):** None discovered so far
8. **Capacity for handling complex information related to taxonomic names (e.g. taxon concept mapping, recording annotations):** Has capability to record taxonomy, annotation and more. Integration with external web services such as Getty Vocabularies, Library of Congress Subject Headings, Encyclopedia of Life and GlobalNames Resolver also allows “outsourcing” or taxonomy and ontologies if desired.
9. **Capacity for handling complex information related to geographic places and for facilitating tasks such as georeferencing:** Built in georeferencing support using user selectable tileservers and OpenStreetMaps geocoder; also has support for GeoNames and in-software place hierarchies.
10. **Capacity for handling complex information related to people (e.g. collectors, identifiers, loan agents):** Has fully configurable facility for recording detailed information about people and organizations.

11. **Capacity for handling complex information related to extended data facets such as traits of (e.g. morphometrics) and interactions between (e.g. parent-child) collection objects:** An data object in CollectiveAccess can be related to any other, and relationships can contain information of their own, including text, dates, georeferencing, media files and more. This flexibility allows for extended data facets and hierarchies.
12. **Capacity for facilitating linkages between collection objects and extended data stored elsewhere, such as a genetic data repository:** CollectiveAccess provides a plug-in interface for interactions with external services. Support for Encyclopedia of Life, GlobalNames, Getty Vocabularies, WorldCat, Nomisma, VIAF and other services have been implemented, and it is usually straightforward to add new ones.
13. **Capacity for facilitating collection management transactions, such as loans, accessions, and transfers:** A variety of collections management workflows are supported, including accessioning, transfer, deaccession, and incoming and outgoing loans.
14. **Capacity for facilitating physical collections care including tracking storage locations and condition reporting:** A variety of collections care workflows are supported, including inventories, location tracking and more.
15. **Capacity to manage media (e.g., 2D images, 3D images, audio, video), and/or to work in sync with a dedicated Digital Asset Management System:** CollectiveAccess supports a wide range of file formats, including many image formats, document formats (PDF, Multipage TIFF, Microsoft Word, Powerpoint and Excel), video formats and audio formats. 3d formats include OBJ, PLY and STL.
16. **Capacity for mobilizing collection object data (e.g., publish directly to an IPT, or export custom text files):** An full-featured export framework is included. With appropriate crosswalks CollectiveAccess-hosted data can be exported to XML, JSON, delimited (CSV, TAB), Excel and MARC formats. Plugins are available to publish data via IPT and OAI.
17. **Capacity for mobilizing collection object media (e.g., serve publicly online via a stable URI):** A full-featured web publishing framework is available.
18. **Ability for users to customize the CMS:** CollectiveAccess is distributed under the open source GNU Public License v3. All source code is accessible and users are free to make their own customizations.

#### IMPLEMENTATION QUESTIONS

19. **Computer infrastructure (hardware, software) required:** CollectiveAccess requires a Linux, Mac or Windows server. Linux and Mac are recommended.
20. **In-house IT expertise required:** Because it is server-based some in-house IT capacity is recommended.

21. **Estimated costs for initial set up:** Varies.
22. **Estimated costs for ongoing expenses such as membership or upgrades:** Freely available under an open source license. No recurring fees.
23. **Migration or other new user services offered:** Whirl-i-Gig offers a range of data migration, system design, hosting and consulting services.
24. **Example institutions/collections using your CMS:** American Museum of Natural History, NY; National Gallery of Art, Washington, DC; Sternberg Museum of Paleontology, Ft Hays, KS; National September 11<sup>th</sup> Memorial and Museum, NY
25. **Representative for potential users to contact:** Seth Kaufman  
(seth@collectiveaccess.org)
26. **Best resources to point potential users to (e.g., presentations, brochures, recorded webinars):** Project web site (<https://collectiveaccess.org>) and support forum (<https://support.collectiveaccess.org>)