Thought Leadership Whitepaper

ADDRESSING THE CHALLENGES OF CHOOSING AN ARCHIVE MANAGEMENT SYSTEM WHILE KEEPING YOUR MENTAL HEALTH

Soutron
GLOBAL

INTRODUCTION

Kitty But, Board Member and Chairlady of the Hong Kong Archives Society, is an information specialist with twenty years of experience establishing and managing diverse collections. During her career, she found herself creating policies and functional activities from ground zero for diverse collection types, including libraries, museums, and archives. These archives contain the rich history and legacy of Hong Kong.

The Soutron Archive Management System, a secure cloud-based solution, is used for collection management needs for one of the oldest property developers in Hong Kong.

DIGGING IN TO ADDRESS UNIQUE COLLECTION MANAGEMENT CHALLENGES

Each collection she has organized has had its own set of unique requirements and challenges. As Kitty dug in to meet the challenges of organizing these diverse collections, she learned the technical specifications to look for in a Collection Management System (CMS), vendor selection criteria, along with taking into consideration the needs and expectations of users. It was clear that a flexible and modern archive management system would be needed to cater to these various aspects, once defined.

Early in her career, technology limitations at the resource center of a private maritime museum where Kitty worked pushed the search for a new solution. They had been using a Windows-based museum software to collect accession records and catalog museum objects and publications. At that point in time, the staff did not realize that the museum had rich archival material in its collection. The software could not support the recording of the context of the archival materials. In addition, she knew that with a collection management system (CMS) she would be better able to record, organize, and display collection materials to the public. The software was not Unicode compliant which meant multilingual inputs and displays were not supported, and worst of all, it did not have an online search portal module for record searching, so no one could find anything, leading to visitor frustration.

To find a new solution, Kitty made a list of products that would meet the museum's needs. She initially selected one and negotiated a 50% discount with the vendor in return for providing a Chinese translation to the interface, which was an excellent deal. However, due to funding limitations, the museum decided not to pursue that vendor proposal. Kitty subsequently built a search portal using web technologies, extracting metadata from the museum software that allowed for public access to the collection. It was the first maritime museum in the Asia region to provide online access to its library and archival collection.

Her second hunt for a new solution was at a well-known family-run food manufacturer. The collection was not solely papers from the family members since the family has a strong connection with the business. She recommended implementing a collection management system to catalogue materials such as product samples, advertisements, packaging, over 20,000 black and white photographs, along with artifacts relating to the family's regional activities that could reflect the social economy and community of the old Hong Kong. Objects such as restaurant menus, utility receipts, and purchase invoices, that illustrate how the community worked at that time could be properly archived. Kitty needed a system that could handle not only paper-based items, but objects and digital assets as well.

This time around, funding was not an issue, and she had the freedom to choose whatever solution she wanted. Kitty selected five vendors to investigate for her new collection management system, and quickly narrowed her search to two vendors that could meet her customized metadata field requirements.

"I learned a lot about how to select the right system and how to negotiate with vendors," stated Kitty when reflecting on the challenges she faced in her search for a new archive solution. She eventually formed a checklist of what she required in a collection management solution, including the standout items below:

- Support for international standards such as ISAD(G) etc.
- The overall implementation cost and annual maintenance cost must be within budget
- A flexible, customizable, user-friendly interface that accommodates a variety of non-standard materials
- Multi-lingual and easy to navigate by a layperson
- Sincere sales communications from the vendor
- Good customer service in the right time zone

After Kitty ended her employment with the family archives, she moved on to her next challenge for one of the oldest property developers in Hong Kong.

She had spoken with Soutron previously and the experience had left a positive impression which remained in her mind. Kitty maintained contact because she had been impressed with the customer portals she had visited previously.

Kitty had a Soutron product demonstration, when the product was new to the market, and remembered the sincerity which the Soutron representative had employed. She, therefore, reached out to Soutron again when she joined this new organization. Her predecessor had been trying to select a system for 2 years, and Kitty picked up where she had left off.

When Kitty contacted Soutron, she "was impressed by the improvement in Soutron's handling of archival materials in such a short period of time. Those improvements told me that the maintenance fees a client would pay will eventually be put towards developing and enhancing the software." She was also impressed by the adoption of the system by other prestigious archives from around the world, Soutron clients' websites and played around with the Soutron search portal to see what it could offer.

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She was impressed by the product's ability to host 'all' content types under one platform, including multilingual archival materials and objects. As her evaluation went on, she narrowed her shortlist down to two systems: Soutron and one her predecessor had selected, ArchivEra from Lucidea.

"They are two quite different systems. Lucidea is like canned food. They provide you with a standard interface, if you wish to customize or amend certain functions to meet your needs, they could offer solutions but the cost can be expensive. Soutron is more flexible, like building with Lego® blocks. You provide a list of requirements; they assemble them into one system. It is fun to use because I can easily create or change or remove data fields that match my needs," Kitty states.

Soutron accommodates the wide variety of materials in her collection. She was certain that the system could provide total flexibility in meeting user expectations and be able to perform a one-click search of the complete collection. More importantly, the quoted price was within her budget, so it was easy to propose the final decision to management.

"I have used many styles and brands of CMSs in my career path. There are always pros and cons with each one," Kitty states. "During my selection of CMSs in the past 10 years, one of the challenges I faced was explaining our real needs to a salesperson. Of course, I understand from a sales point of view, this person is required to sell successfully. On the other hand, from the user point of view, if this person could try stepping into our shoes, and help us adjust the system to meet our requirements, and sell with sincerity like Soutron did, that salesperson would be halfway to completing a sale."

As she conducted these vendor assessments, Kitty learned "The communication side with the vendor is especially important. I need to be comfortable communicating with the vendor. The question I ask myself when I contact them is: Would I get feedback on time, or will I be chasing after the vendor for an answer?"

Something Kitty learned she needed to know about from the very beginning is what kind of helpdesk support she would get from the vendor she selected. If she had strong support from an internal IT department, it would not be as important, but Kitty, like many archivists, has limited IT support. Outstanding system support from a vendor would be one of the

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major factors. Kitty, therefore, chose Soutron as the vendor this time. She knew they had a strong technical background, and knew if she had a question," they could help me as soon as possible, plus I do not have to wait another half a day for a response because of the time zone difference."
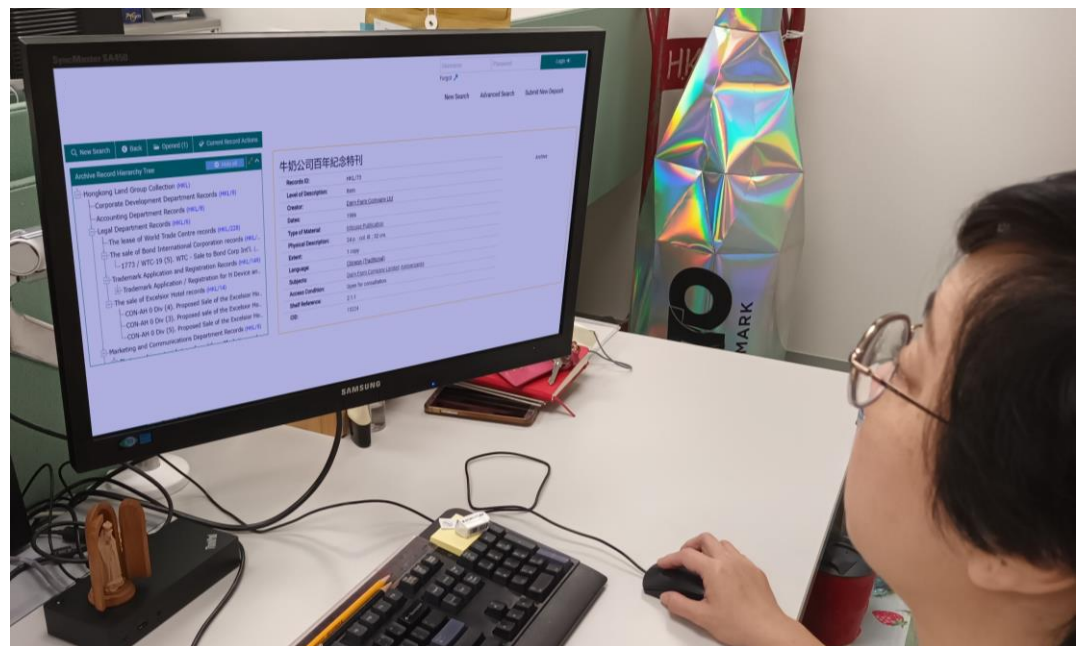
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"The flexibility and ease of customization is important after all these years of using archive collection management systems," states Kitty. "Soutron systems grow with you and can be easily adapted as your needs change. With other products it is *what-you-see-is-what-you-get*. And if you want a change, it will cost you a fortune. All vendors forget, organizations have unique needs, and I need to make sure the system can change easily without causing too much trouble for now and for the future. With Soutron, it is easy. They have the system ready for change. If you want to update something big you can, if you want to make a small amendment, you can. You do not even have to go back to the helpdesk. You can go to their Wiki and learn, which, if you are a nosey person like me, you will do. Or if someone is short of time, they can go to the help desk and ask how to do this and that – and it just gets done!

We had a fun time implementing the system. They taught the backend and said this is something you can do yourself as you get more comfortable. That is important to me; to be able to choose to do it myself or ask for help."

MAKING THE RESULTS WORTH THE MENTAL CLIMB

"Some of my relationships with software vendors have turned into life-long friendships, as those vendors have listened to my needs and provided solutions, as Soutron has done. They are not like other vendors who come back and say they need $$$ to fund the cost of developing new functionality. If I have wanted or needed something new, they have developed it for me. My choices have always come down to three major factors: money, people, time zone," clarifies Kitty.

Kitty has found Soutron's turnkey system to be flexible enough to meet her organization's needs and has found the company's online knowledge base and supporting wiki to be very handy resources for "nosey" people like herself who like to jump in and make updates themselves. She likes making changes to the system, as her collection needs change and finds it fun to work with Soutron support. She especially likes it when product support provides her with money-saving tips as they did with a recent storage suggestion.

"Soutron support informed me I could store the digitized items on a selected cloud storage, then copy and paste a URL to a record, done! This reduces storage and saves costs! Advice and service. That is why I like Soutron," states Kitty.

"Choosing Soutron has been very good for my mental health, because I know that if I had chosen the wrong solution, I would suffer. I consider this to be my legacy contribution to the people of Hong Kong. I want to set up a very good system for this organization, because my goal is to one day get back to London to take care of my aging parents," states Kitty. "As a British citizen, I naturally catalog in both English and Chinese, and it has been wonderful to be a part of creating a corporate memory that helps with community engagement."

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About Kitty But

An accomplished professional, Kitty has earned her BSc in Information and Library Management, a Master's in Public Administration with a focus on Information Technology, a Certificate in Knowledge Management for Information Professionals, and a Postgraduate diploma in Archival Studies.

She has presented at the 2019 International Symposium of the Southeast Asia Regional Branch of the International Council on Archives. Title: "Corporate Social Responsibility: Engaging the Community." Kitty has also presented at the International Conference on Chinese Digital Publishing and Digital Libraries and presented a Paper at the International Federation of Library Associations (IFLA).

Kitty is also a published author, having had an article published in the "National China Maritime Museum" Journal.

If you enjoyed this thought leadership paper, you might enjoy our educational webinars with Samantha Lawrence titled:

"Solo Archivist 101 – Managing time and priorities".
"Archival Advocacy"

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