



## **Council of Nova Scotia Archives**

### **Archives Management Software Review Report**

#### **Executive Summary**

Prepared By  
Amanda Stevens, MLIS

For the ArchWay Committee,  
Council of Nova Scotia Archives

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# Table of Contents

I. Executive Summary.....	1
II. Factors to Consider in Selecting an Archives Management Software Program .....	see full report
III. Research Methodology .....	see full report
IV. Software Reviews and Features Tables .....	see full report
1. Archives Online 3.....	see full report
2. Archivists' Toolkit 1.1.....	see full report
3. Archon 2.2 .....	see full report
4. PastPerfect 4.0 .....	see full report
5. Re:discovery Proficio 8.6.....	see full report
6. STAR/Archives 4.0.....	see full report
7. Microsoft Access and Filemaker Pro.....	see full report
V. Acknowledgements.....	see full report
VI. Disclaimer.....	see full report
Bibliography .....	see full report
Appendix 1: Archives Management Software Programs Excluded from Review.....	see full report
Appendix 2: Interview Questions for Archivists .....	see full report
Appendix 3: Glossary of Terms .....	see full report

## I. Executive Summary

The Council of Nova Scotia Archives (CNSA) is an association of archives and archivists in Nova Scotia that advocates the importance of archives, the preservation of Nova Scotia's documentary heritage, and public access to these records through its member institutions. The CNSA initiated this study to provide its members with information that will help them make informed choices about archives management software purchases, including a list of factors to consider in their decision-making process. The overall goal of the study is to enable member archives to automate the functions of accessioning and description and thereby facilitate the addition of descriptions to the provincial union database: ArchWay.

This report is designed for small and medium-sized archives with annual budgets of \$45,000 or less, operated by volunteers and/or one or two full time employees who may have professional training in archives and may or may not have information technology expertise. While it is recognized that increased use of technology could improve organizational efficiency and provide the public with better access to archival records, constraints to adopting new technology must also be acknowledged. The needs of these members have guided the research and evaluation process used in this review and determined the criteria used to evaluate the software. The basic criteria are:

- Software or a specific module of the software designed specifically for archives management
- Software and support available in Nova Scotia
- Includes functions for accession and description of archival records
- Accommodates hierarchical arrangement of records
- Initial purchase cost does not exceed \$8,000\*
- Widely used enough that sufficient information was available for fair evaluation
- Targeted to the English language market

Based on the basic criteria, six programs were selected for detailed review, including two open source programs and four proprietary programs:

1. Archives Online (add-on to Inmagic DB/TextWorks)
2. Archivists' Toolkit (open source)
3. Archon (open source)
4. PastPerfect
5. Re:discovery Proficio
6. STAR/Archives

Appendix 1 provides a list of other software programs used for archives management that were not selected because they did not meet one of the above basic criteria. Eloquent Archives was not reviewed because CNSA members already use it online to support ArchWay, the province's union database of archival descriptions. In addition, the report briefly considers Filemaker Pro and Microsoft Access

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\* STAR/Archives price for multi-user licences exceed this amount but allows multiple organizations the option to purchase as a group.

## I. Executive Summary

database software, as these programs were not designed specifically for archives management but are used widely by archives across Canada.

### Review Process:

After determining that these programs met the basic criteria, they were further examined and evaluated for specific features unique to archives, general usability, and quality of user support available. Basic testing of demonstration copies of the programs, interviews with archivists who have used the software, and a review of current literature were undertaken in the summer of 2008.

### Results:

It was determined that all of the programs selected for review can be used to effectively manage archival collections, and each has its own unique strengths. To make a choice, the CNSA recommends that members undertake a detailed review of their own needs before choosing a software program. Section II: Factors to Consider in Selecting an Archives Management Software Program suggests a number of factors to consider in determining an organization's software needs and provides further explanation of the evaluative criteria. However, the evaluation process led to the selection of three archives management programs that stand out from the rest: STAR/Archives, the Archivists' Toolkit, and Archives Online.

These three programs have detailed modules for managing archival accessioning and description. They all received positive reviews from users. All are currently set up or can be made to conform to RAD standards.

**STAR/Archives** is the most expensive of the three programs, but it offers an extensive number of features and a great deal of flexibility, and the vendor is reported to provide excellent support to users. Although the software is intuitive and user-friendly, it is a complex program and may be too complicated for small organizations staffed by volunteers to use. This program is best suited for medium-sized archives or small archives with a professional archivist on staff that require a full suite of features, robust description writing and search features, and the ability to publish finding aids on the web with an attractive user interface.

The **Archivists' Toolkit** is the least expensive of the three programs, as it can be downloaded for free under an open source license. While it does not have as many features as STAR/Archives, its features are also quite robust, particularly the accessions module. The program is very flexible and allows users to customize the program to conform to specific archival standards and internal workflows. The user interface is straightforward and intuitive and many functions can be accomplished by simply clicking buttons. With no public search interface or the ability to publish collections online, the Archivists' Toolkit is a strong tool for behind-the-scenes archives management.

If a simple but fully featured and highly customizable program is needed, **Archives Online** is a good choice. The description module is RAD compliant but simple, and there is also an option of using a brief data entry form with a limited number of required fields. The program is highly customizable, providing users with the ability to add, modify, or delete fields, alter database structures, create new databases from scratch, design reports, and more. One significant drawback of Archives Online is it is not relational and so does not link accession and description records, and related records within a

## I. Executive Summary

hierarchy are not displayed or linked as well as in the other two programs. However, at an affordable price, it is a good choice for small archives looking for a simple system.

Please refer to Section IV for detailed reviews of Archives Online, STAR/Archives, the Archivists' Toolkit, and the other four programs. Below is also a table which briefly notes the price, advantages, disadvantages, and our observations about each software program. Demonstration copies of some programs reviewed are on the CNSA Software Review Project Laptop, available for borrowing by members. Please contact the Archives Advisor to make arrangements for borrowing.

### Disclaimer:

The information presented in this report is intended for the benefit of CNSA members in order to help them make informed choices and decisions about the range of archives software products available. It does not advocate the purchase of one program to meet all circumstances. Rather it provides a tool for archivists to evaluate several software programs to find the best match for an archive's specific needs. Furthermore, given the dynamic nature of technology, the information in this report is subject to change and may not reflect newer versions of the software products reviewed.

I. Executive Summary

<b>Archives Management Software Programs Comparison Table</b>			
<b>Base price</b>	<b>Strengths</b>	<b>Weaknesses</b>	<b>Observations</b>
<b>Software program: Archives Online</b>			
<ul style="list-style-type: none"> <li>• \$2,700.00+ to purchase license</li> <li>• \$1,800/year for hosted service</li> </ul>	<ul style="list-style-type: none"> <li>• Extensive user customization permitted</li> <li>• RAD compliant</li> <li>• Simple data entry</li> <li>• Strong reporting features</li> <li>• Good support</li> </ul>	<ul style="list-style-type: none"> <li>• Database not relational and records not linked</li> <li>• Limited collections management features</li> <li>• Hierarchical relationships poorly displayed</li> </ul>	<ul style="list-style-type: none"> <li>• Useful for small archives with volunteer staff looking for a simple program with full functionality for accessioning and description.</li> </ul>
<b>Software program: Archivists' Toolkit</b>			
<ul style="list-style-type: none"> <li>• Free</li> </ul>	<ul style="list-style-type: none"> <li>• Good management of hierarchical relationships</li> <li>• Detailed and complete accession form</li> <li>• Detailed and flexible description form</li> <li>• Good support and user manual</li> <li>• Simple and intuitive user interface</li> <li>• Strong reporting features</li> <li>• Free to install and use</li> <li>• Easily generate EAD and MARC records</li> </ul>	<ul style="list-style-type: none"> <li>• Limited support for multimedia</li> <li>• No public search interface or ability to publish to the web</li> <li>• No customization available from developers</li> </ul>	<ul style="list-style-type: none"> <li>• Worth trying out this robust, flexible, and easy-to-use program, which is free to download and install.</li> </ul>
<b>Software program: Archon</b>			
<ul style="list-style-type: none"> <li>• Free</li> </ul>	<ul style="list-style-type: none"> <li>• Easily put collections on the web</li> <li>• Easily generate EAD and MARC records</li> <li>• Simple public search function</li> </ul>	<ul style="list-style-type: none"> <li>• Limited customization without technical knowledge</li> <li>• Poor help manual</li> <li>• Limited accession form</li> <li>• Limited search options</li> <li>• No reporting features</li> </ul>	<ul style="list-style-type: none"> <li>• Useful for archives looking for simple tool to put collections online, but lacking in usability and other features. But many issues are expected to be resolved with next release of the software and Archon could become a very strong tool.</li> </ul>

## I. Executive Summary

<b>Archives Management Software Programs Comparison Table</b>			
<b>Base price</b>	<b>Strengths</b>	<b>Weaknesses</b>	<b>Observations</b>
<b>Software program: PastPerfect</b>			
<ul style="list-style-type: none"> <li>• \$922.00+ to purchase license</li> </ul>	<ul style="list-style-type: none"> <li>• Can manage museum, archives, library, and photograph collections together</li> <li>• Variety of search options</li> <li>• Good reporting features</li> <li>• Good features for managing multimedia</li> <li>• Good linking between accessions and descriptions</li> </ul>	<ul style="list-style-type: none"> <li>• Few options for user customization and no customization available from vendor</li> <li>• Potential difficulties importing data</li> <li>• Limited accession form</li> <li>• Hierarchical relationships poorly displayed</li> <li>• Not completely RAD compliant</li> </ul>	<ul style="list-style-type: none"> <li>• As the least expensive of the proprietary programs but offering many features and the ability to manage both archives and museum holdings, PastPerfect is useful for organizations with limited budgets and mixed collections where the archival holdings are small.</li> </ul>
<b>Software program: Re:discovery Proficio</b>			
<ul style="list-style-type: none"> <li>• \$3,549.00+ to purchase license</li> <li>• \$1,345/year for hosted service</li> <li>• Cooperative purchasing option available</li> </ul>	<ul style="list-style-type: none"> <li>• Manage diverse collections together</li> <li>• Detailed description form</li> <li>• Good linking between accessions and descriptions</li> <li>• Good management of hierarchical relationships</li> <li>• Good reporting and import/export features</li> <li>• Extensive collections management features</li> </ul>	<ul style="list-style-type: none"> <li>• Limited accession form</li> <li>• Limited user customization options</li> <li>• Poor help manual</li> </ul>	<ul style="list-style-type: none"> <li>• Useful for medium-sized archives that could pay for some customization work to improve the accession form and invest some time in learning the software. Also suitable for organizations with museum and archives holdings.</li> </ul>
<b>Software program: STAR/Archives</b>			
<ul style="list-style-type: none"> <li>• \$9,786.00+ to purchase license</li> <li>• \$2,123.00/year for hosted service</li> <li>• Cooperative purchasing option available</li> </ul>	<ul style="list-style-type: none"> <li>• Detailed accession and description forms</li> <li>• Good vendor support</li> <li>• Simple and attractive public search interface</li> <li>• Can provide web access to collections</li> <li>• Extensive options for searching and displaying search results</li> <li>• Can also be used to manage museum and library collections</li> <li>• Accommodates different types of media</li> </ul>	<ul style="list-style-type: none"> <li>• Data entry could be complicated</li> <li>• Limited ability to create or customize reports</li> <li>• Limited ability to customize without training or with hosted service</li> <li>• One accession record can only be linked with one description record</li> </ul>	<ul style="list-style-type: none"> <li>• Useful for medium-sized archives or small archives with a professional archivist on staff that require a full suite of features, robust description writing and search features, and the ability to publish finding aids on the web with an attractive user interface.</li> </ul>