RFP Schedule-A-Solution Requirements

# Management of Objects

| Req# | Requirement | Proponent Response |
| --- | --- | --- |
| 1.01 | The system must be capable of supporting **Object Entry** procedures - managing and documenting the receipt of objects that are not currently part of the collection. Desirable features and functionality should include but is not limited to:* Create unique local deposit number.
* Create entry records that can be used as the basis for acquisitions or loans
* management of object lots.
* Capture object data such as owner name, depositor name, location, number of lots, return date.
* Track object(s) returned to owner.

Describe your products **Object Entry** capabilities in detail. |  |
| 1.02 | The system must be capable of supporting **Acquisition and Accessioning** procedures – taking legal ownership of objects or object lots. Desirable features and functionality should include but is not limited to:* Record basic information about the object such as object number, object name, brief description, number of objects, acquisition date, acquisition method, acquisition source, transfer of title, current location, location data and permanent collection.
* Enable accessioning by lot.
* Create a unique system identifier for objects / object lots.
* Provide capability to support accession numbers in a variety of formats
* Track historical object identifiers.
* Record source information about the object such as acquisition source, title, surname, address.
* Record justification information about the object such as reason for acquisition, documentation supporting acquisition.
* Record title transfer information such as method of acquisition, evidence of original title, authorization signature.
* Enable user to transfer title, describe objects or object lots, and enter previous owner information.
* Maintain an accessions register displaying all acquisitions.

Describe your products **Acquisition and Accessioning** capabilities in detail. |  |
| 1.03 | The system must be capable of supporting **Inventory Control** procedures – the maintenance of up-to-date information identifying all objects for which the institution has a legal responsibility. Desirable features and functionality should include but is not limited to:* Record of physical inventory details such as object location, date inventoried, staff who took inventory
* Record of an objects status such as accessioned, not-yet-accessioned, loaned, exhibited, deaccessioned or missing.
* Support for Inventory verification using spot-checks

Describe your products **Inventory Control** capabilities in detail. |  |
| 1.04 | The system must be capable of supporting **Location and Movement Control Process** procedures – the documentation and management of information concerning the current and past locations of all objects/object lots in the museums care. Desirable features and functionality should include but is not limited to:* Record of objects permanent location
* Ability to retrieve object information by location
* Ability to identify objects that are displaced from their permanent location including the displace objects actual location.
* Tracking of historical locations including date moved.
* Ability to track distinct locations to parts of an object or object lot
* supports group relocation of objects
* recording authorization of movements and staff responsible for movement
* documentation about object handling, packing, storage and display
* history of movements

Describe your products **Location and Movement Control Process** capabilities in detail. |  |
| 1.05 | The system must be capable of supporting **Cataloging** procedures – the compilation and maintenance of primary information describing, formally identifying, or otherwise relating to objects in the collection. Desirable features and functionality should include but is not limited to:* Ability to track ownership and ownership history of objects
* Ability to track object history including references to publications, research and files

Describe your products **Cataloging** capabilities in detail. |  |
| 1.06 | The system must be capable of supporting **Conservation Management** procedures – the documentation and management of information about the conservation of objects from a curatorial and collections management perspective. Desirable features and functionality should include but is not limited to:* Requests for conservation
* Conservation examinations
* Preventative measures and treatments
* Ability to track Conservation history

Describe your products **Conservation Management** capabilities in detail. |  |
| 1.07 | The system must be capable of supporting **Risk Management** procedures – the documentation and management of information relating to potential threats to the museum’s collection. Desirable features and functionality should include but is not limited to:* Information on potential threats and preventative measures
* Contacts and disaster procedures
* Accountability for objects during or after a disaster

Describe your products **Risk Management** capabilities in detail. |  |
| 1.08 | The system must be capable of supporting **Insurance Management and Valuation Control** procedures – the documentation and management of the insurance needs of objects in the museum’s permanent collection, and those for which it is temporarily responsible – such as loans or deposits. Desirable features and functionality should include but is not limited to:* documents Appraisal & appraiser information
* confidentially tracks value history of objects
* tracks insurance policies and claims

Describe your products **Insurance Management and Valuation Control** capabilities in detail. |  |
| 1.09 | The system must be capable of supporting **Exhibition Management** procedures – the documentation and management of temporary exhibitions and permanent displays from the curatorial and collections management perspective. Desirable features and functionality should include but is not limited to:* support for analog and digital exhibits
* tracks object exhibition history

Describe your products **Exhibition Management** capabilities in detail. |  |
| 1.10 | The system must be capable of supporting **Dispatch Management** procedures – the documentation and management of objects or object lots leaving the museum’s premises. Desirable features and functionality should include but is not limited to:* maintains location information for all objects that leave the museum
* documents transportation details and information about persons who authorize the dispatch

Describe your products **Dispatch Management** capabilities in detail. |  |
| 1.11 | The system must be capable of supporting **Loan (Borrowing and Lending)** procedures – managing and documenting the borrowing or lending of objects for which the museum is responsible for a specific period of time and purpose. Desirable features and functionality should include but is not limited to:* generation of unique loan numbers
* track the lender/borrower, loan period and track history
* generate loan agreements
* manage insurance, shipping, packing and costs

Describe your products **Loan (Borrowing and Lending)** capabilities in detail |  |
| 1.12 | The system must be capable of supporting **Deaccession and Disposal** procedures – The management of object disposals (transfer, sale, exchange, or destruction) and deaccessions (documentation of the disposal). Desirable features and functionality should include but is not limited to:* title transfer
* records approval, reason for disposal and verifies legal title

Describe your products **Deaccession and Disposal** capabilities in detail. |  |

# Database Management

| Req# | Requirement | Proponent Response |
| --- | --- | --- |
| 2.01 | The system must support **Metadata Administration** – the way metadata on fields or multimedia file is stored, tracked and recognized. Desirable features and functionality should include but is not limited to:* Capable of using more than one metadata standard.
* Ability to import/export metadata about multimedia files.
* Ability to recognize metadata produced by digital equipment.
* Viewing of metadata on fields or multimedia files.

Describe your products **Metadata Administration** capabilities in detail. |  |
| 2.02 | The system must be capable of supporting **Multimedia Files**. Desirable features and functionality should include but is not limited to:* Ability to associate multimedia files to objects.
* Support multiple file types such as sound, image, video, animation, 3-D images.
* Ability to associate text (captions) with images.
* Ability to produce images with different resolutions / formats.
* Storage for multimedia files should be easily expandable.
* Ability to support multimedia plug-ins.

Describe your products **Multimedia** capabilities in detail. |  |
| 2.03 | Data field definitions – ie. date & money - should be configurable by the institution. Describe your products **Data Structure** and include examples of **data validation** supported by your product. |  |
| 2.04 | The system must support real-time and batch/global updating. Describe the **data update** features of your product. |  |
| 2.05 | The system must be capable of supporting **Authority Control** - "authority" should be taken to mean a simple list of permissible terms (not arranged hierarchically) to be used during data entry and/or retrieval.Describe the **Authority Control** features of your product. |  |
| 2.06 | The system must be capable of supporting **Thesaural Control** - "thesaurus" is taken to mean a list of terms showing hierarchical, synonymous, and other relationships.Describe the **Thesaural Control** features of your product. |  |

# User Interface

| Req# | Requirement | Proponent Response |
| --- | --- | --- |
| 3.01 | The User Interface should provide **Help** features. Describe the **Help** features your product supports. |  |
| 3.02 | The system should support the definition of **Data Entry Rules** that dictate how the museum wants data entered in the User Interface. Describe the **Data Entry Rules** your product supports. |  |
| 3.03 | Describe the **Date features and formats** that your product supports and include how the system supports approximate dates (ie. circa, BC, AD) and unknown dates. |  |
| 3.04 | The system should support **user customization** of the User Interface (ie. Layout, field labels, error messages). Describe how your product supports **user customization.** |  |
| 3.05 | The user interface should support **English and French language**. Describe how your product supports these languages.  |  |
| 3.07 | The system should support **Tools** for ensuring the user interface and content is accessible to people with disabilities. Describe how your product supports **Accessibility**. |  |

# Query

| Req# | Requirement | Proponent Response |
| --- | --- | --- |
| 4.01 | The system should support **Native Queries** of database objects. Describe how to execute a native query of your product. |  |
| 4.02 | The User Interface should have a general **query** feature. Describe how the query feature works for your product. (ie. Operators, range searches, wildcard searches) |  |
| 4.03 | The system should enable users to save the **results of queries** in their desired format. Describe how your product supports this including any limitations. |  |
| 4.04 | The system should provide **enhanced Query features** that include but are not limited to:* Phonetic searching
* Natural language queries
* Ability to save and modify search criterion for re-use.

Describe any **enhanced Query features** your product delivers. |  |

# Reports

| Req# | Requirement | Proponent Response |
| --- | --- | --- |
| 5.01 | The system should come with **pre-defined reports** that can be generated using file formats required by the institution. Provide a list of **pre-defined reports** that your product supports and explain whether pre-defined reports can be tailored by the museum. |  |
| 5.02 | The system should have a feature for creating and executing **user-defined reports** including labels and forms. Describe the user-defined reporting capability supported by your product. |  |
| 5.03 | Describe whether your product has a **built-in Report generator** and/or is capable of integrating with **external Reporting Tools.** |  |
| 5.04 | Describe whether your product generates reports using **real-time data**. |  |
| 5.05 | Reports should be able to support **formatting features** such as * text format standards including diacritics and different fonts
* document formatting including headers and footers, margin control

Describe your products **report formatting** features. |  |
| 5.06 | The system should support **report templates** that can be easily customized by user administrators. Describe your products capability with **report templates**. |  |
| 5.07 | The system should be capable of providing **visual representation** of museum data. For example* usage / stats of taxonomies
* temporal data rendered visually using timelines

Describe your products use of **visual representation** of data. |  |

# Enhanced Collection Management

| Req# | Requirement | Proponent Response |
| --- | --- | --- |
| 6.01 | The system must manage and document information about **the Rights and Reproduction of Objects**. Describe how your product manages Rights and Reproduction of Objects including: * how copyright is managed
* ownership of copyright of reproductions
* illegal reproductions
 |  |
| 6.02 | The system should have an **integrated web publishing component** to facilitate public viewing of object information via the Province of PEI public website. Describe how your product can achieve this.  |  |
| 6.03 | The system should be functional on **multiple platforms** such as:* Desktop
* Android mobile
* iOS mobile

List platforms supported by your product. |  |
| 6.04 | The system should be capable of **restricting access** to objects or data classified as ‘strictly confidential’, ‘confidential’, ‘internal’, ‘public’, etc. Describe how your product manages data classification, in particular, how the system restricts public access. |  |
| 6.05 | The system should facilitate **customization** of workflows, data entry fields, reports, controlled vocabularies, event types and access control levels. Describe the level of customization supported by your product. |  |

# Technical

| Req# | Requirement | Proponent Response |
| --- | --- | --- |
| 7.01 | The proponent must ensure the system is **documented and supported**. Describe the level of user & technical documentation provided by the proponent. Also indicate if the system will / can be delivered with * a data dictionary
* source code
* optional modules
 |  |
| 7.02 | The system must be delivered with **training**. Describe the training options & costs available. |  |
| 7.03 | The system should be able to support multiple **units of measurement** (metric / imperial). Describe these features of your product.  |  |
| 7.04 | The system should support **Optical Character Recognition** (OCR). Describe how your product utilizes / manages OCR. |  |