The National Archives

COLLECTION CARE DATABASE - EXPRESSIONS OF INTEREST STAGE

PLEASE RESPOND BY 5PM, 20TH MARCH 2017

PLEASE NOTE: At this stage the information below is for your information only. If this may be an opportunity of interest to you, please note that you need only submit an Expression of Interest to procurement@nationalarchives.gsi.gov.uk **by 5pm, 20th March 2017**. There is no standard or set form for such Expressions of Interest and a simple email will suffice.

1   BACKGROUND – THE NATIONAL ARCHIVES

The National Archives (TNA), based in Kew, South West London, is the national repository of the official archives of the British government and the central law courts of England and Wales. Containing over 11 million records, it is of high national and international heritage significance, and one of the world's most valuable resources for academic research. It is the guardian of some of the most iconic national documents, dating back over 1,000 years. Its 21st century role is to collect and secure the future of the government record, both digital and physical, to preserve it for generations to come, and to make it as accessible and available as possible. Further information about TNA's role, its plans, policies, performance and projects can be found on its website here.

2   BACKGROUND – THE COLLECTION CARE DEPARTMENT

The Collection Care Department (CCD) is responsible for conservation at TNA. The department documents its activities using qualitative, quantitative and visual data, for example condition reporting, treatment, loans and exhibitions, scientific data from surveys/material analysis and before/after treatment images.

CCD requires an innovative, cloud-based database system to integrate the conservation department's qualitative, quantitative and visual data to improve data management and streamline processes. The system should have the flexibility to grow with the department's changing data needs while being relevant to conservation documentation. It should provide the means to document and record data on the condition and conservation treatment of TNA collection's items, and facilitate the management of conservation projects, as well as loans and exhibitions tracking.

Currently, data is stored across Microsoft Access, Excel, Word, with images stored on a separate drive. Documentation is stored in various places because the department's data needs have outgrown the current Access Conservation documentation database.

3   REQUIRED FUNCTIONS

3.1   Each Collection item at TNA has a unique identifier; its catalogue reference. These are formed by letters indicating the originating government department (e.g. WO), followed by a sequence of numbers for series (e.g. 78), piece (e.g. 2368) and

sometimes item (e.g. 1). This would give the full catalogue reference *WO 78/2368/1* (please note the space and forward slashes), which may refer to a single document or small set of documents. These catalogue references will be used on the system to identify a collection item.

3.2   CCD would therefore require the database to be able to capture these references and be used as a 'look-up' to return information about each collection item.

3.3   CCD needs to document physical condition of collection items, conservation treatments, procedures and materials. Information required may vary, but in most cases should include:

- Adding of single or multiple collection items to the database;
- An electronic image (photo or scan), mostly .jpeg, .tiff or .raw, (other formats also useful). There should be the ability to zoom in/out freely;
- Annotations (e.g. pointing out tears, stains, foxing). There should be the facility to add arrows to point at areas of the image, and/or smart shapes to surround areas of the image;
- Treatment information (e.g. materials, methods, time/date when treatment was done/is to be done);
- Annotations may be from drop-box selections, but must also allow free text;
- Ability to upload and attach documents (e.g. MS Word/Excel/PDF) to database entries;
- The database should be searchable by catalogue reference, and/or keywords within annotations;
- An audit trail (showing times and dates of actions taken, and by which user).

3.4   CCD wishes to be able to link collection items to different activities, e.g. collection items that are going out on loan, or form part of a conservation project, or are being surveyed, Therefore:

- Activities should be able to be created and titled accordingly as a loan, project, survey etc;
- Group titles should be editable once assigned, whilst retaining all relationships with linked collection items;
- Information on collection items should be editable, both on an individual item level and at activity level;
- Facility to add an overall activity status (e.g. from a drop-box, such as 'On Hold', 'Awaiting External Funding', 'On Loan ending [dd/mm/yyyy]');
- Facility to add 'to do by' dates to the activity status (e.g. to indicate when the next action on the Project is to be taken);
- An audit trail to show times and dates of actions taken, and by which user.

3.5   The database should have the ability to hold information in order track and monitor activity progress, such as:

- time spent on the activity so far;

- time remaining (based on the estimates as produced above);
- completion date for each stage.

3.6 The database should be able to produce bespoke reports (on screen, printable, and exportable to e.g. MS Word, PDF, CSV formats) based on as many different fields as possible, but primarily:

- By activity status;
- By date (e.g. to show which collection items or activities might be awaiting for action today, this week, next month);
- By user (e.g. actions performed, collection items worked on);
- By collection item condition (contents of annotations);
- A report on a single collection item to show all relevant information on that item;
- A report on multiple collection items, to show all relevant information on a series of collection items;
- Bespoke report templates, to CCD specifications (to be defined with Potential Suppliers during the implementation phase).

3.7 The database should have the capacity to manage and facilitate Loans and Exhibitions activities in particular by:

- Managing action tasks (with prompts to users for dated tasks);
- Saving contacts (client management);
- Contracts, forms and images can be shared with external contacts in a view only mode (e.g private viewing room via link).

3.8 CCD would require the migration of all current conservation data (Excel, Access, and Word) into the new database.

4 DESIRABLE FUNCTIONS

4.1 TNA's staff current Active Directory (Kerberos software) login to be integrated with the new database, negating the needs for separate login accounts.

4.2 The database may also have the capability in future of further integration with other TNA systems (TNA's Catalogue 'Discovery').

5 SECURITY AND ACCESS

5.1 Access to the database as a whole should be controlled by login (username and password), with the ability to limit user privileges as to which areas of the database can be accessed, and which action types are available to the user. Ability to grant limited access to external users (potentially by issuing a hyperlink to a 'view-only' area). A minimum of 50 individual users across the system would be required.

Multiple users should be able to access the system (including the same document) at the same time, to facilitate collaboration.

5.2 Cloud-based in order to allow for remote working. Using remote devices (e.g. smartphone, laptop, and tablet).

5.3 If internet connectivity is unavailable at the location, the database should be able to store all work and synchronise the stored data with the cloud database, when connected.

5.4 We require that Potential Suppliers have adopted one or more recognised standards for information security which are demonstrated by third-party external validation such as audit or compliance testing, e.g. ISO 27001, Cyber Essentials Plus.

5.5 All data must be stored in a highly secure UK/EU cloud.

5.6 All data must be recoverable by TNA in the event of contract ending or termination, exported in a well documented format which can be easily imported into another application.

6 BUDGET

6.1 We anticipate letting a contract for up to five years with a maximum budget of up to £60,000.