



Canadian Museum of Immigration at Pier 21
Musée canadien de l'immigration du Quai 21

Request for Proposals Collections Management Software

Date of Solicitation: October 18, 2019

Closing: November 20, 2019 at 2:00 p.m. Atlantic Standard Time (AST)

The Canadian Museum of Immigration at Pier 21 is committed to purchasing goods and services to ensure the best overall value. Procurement is conducted with due regard to applicable laws, regulations, trade agreements, internal policies, environmental considerations and competitive processes.

Ensure that you have read all procurement documents carefully and that your response includes all of the information requested.

Canada

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1. Request for Proposal

1.1 Statement of Need

In this Request for Proposal (“RFP”), the Canadian Museum of Immigration at Pier 21 (hereinafter “CMI”) is seeking to acquire collections management software that is browser-based and hosted on servers and backups that reside on Canadian soil. The secure cloud servers will use the TLS protocol during transfer. The successful Software as a Service (SaaS) solution will have administration portals as well as public portals that can be accessed via widely used desktop and mobile browsers.

The software administration interface will provide our collection team with a user-friendly, pre-built application that provides all or most of our requirements. CMI desires an integrated and automated publishing workflow. The online interface will promote exploration of the collection via browsing thumbnails, virtual galleries, categories and advanced search and results functionality.

1.2 Background

CMI collects, shares and pays tribute to the Canadian immigration story. CMI is situated on the Halifax waterfront at Pier 21, the National Historic Site that served as the gateway to Canada for nearly one million immigrants between 1928 and 1971. Today, this former immigration shed is home to Atlantic Canada’s only national museum.

CMI was established under The Museums Act and began operating as a Crown Corporation in February 2011. CMI falls under Part X of the Financial Administration Act (FAA), which establishes the control and accountability regime for Crown corporations. It is also subject to a range of other statutes governing employment and superannuation, access to information and privacy, and Official Languages, among others.

CMI’s collection constitutes an invaluable cultural resource to help Canadians learn about and engage with the nation’s immigration history. The oral histories, digital images, written story accounts, archival materials and artifacts that comprise the collection promote an understanding of the breadth of experiences of immigrants to Canada, and their role in the evolution of the country’s culture, economy and way of life.

1.3 Current Environment

CMI prioritizes the acquisition of digital assets. The collection is 90% digital and its size to date is 77.8 TB with an estimated growth of 6 TB per year. There are approximately 1,300 audio and video oral history interviews, 67,000 digital files, and 2,800 written stories. The file formats are: .mp3, .mp4, .ogg, .ogv, .webm, .mov, .wav, .tiff, .jpeg, .txt, .pdf, and docx.

The Collections team uses a combination of five separate Excel spreadsheets and a local installation of Collective Access to manage records.

Approximately 26,773 cataloguing records and 15,000 entity records will need to migrate from our current system to the new software. The entity records include families, individuals, organizations, and ships. New records are created daily. These numbers do not include places or events.

Three collections staff have full read and write access of the database and approximately five additional staff have full read and limited write access. The remainder of Museum staff have limited read only access.

CMI is committed to making its collection accessible online. To date there are 1667 story, 6000 image and 702 oral history records available on our website.

Publishing collection records and assets to our Drupal website is a manual process. We do not have an API. The Collections team exports XML files and manually cleans for extraneous code or other flagged issues. They compress audio/video assets and down sample and resize image files. The Digital Platform team imports the XMLs and uploads the assets. There is often more debugging at this stage.

Assets residing on our remote web server are 7,000+ down sampled collection images, 702 compressed videos and audio files that take up in excess of 10GB of space. These assets will be migrated to the new collection software's hosting space or alternate cloud storage. Currently, we do not use a streaming service.

1.4 Scope of Work

- 1.4.1 The software must support our standards and practices. CMI adheres to the Dublin Core Metadata Initiative and the Nomenclature for Museum Cataloguing created by Robert G. Chenhall.
- 1.4.2 The permanent collection is comprised of five sub-collections: oral history, written story, digital image, archival, and artifact. Each sub-collection requires a specialized cataloguing form with different fields and values. CMI needs to be able to create relationships among records; relating records to other records, entities, organizations, ships, and events. We also need to be able to perform simple batch edits. We require that the system is highly configurable with the ability for us to create new sub-collections and add or change fields over time.
- 1.4.3 CMI requires a detailed, thorough, and comprehensive search function that is capable of filtering results extensively. This allows us to find specific items for exhibitions and other requests and enables us to monitor the collection.
- 1.4.4 CMI requires functionality that allows us to include permanent collection, loans, deaccessioned items and new offers of donation in the system separately with the ability to search independently. A combination of Excel spreadsheets and Collective Access are currently used to accession, catalogue, and track items. The software should be able to combine these efforts into

an automated and efficient workflow where saved changes are displayed throughout the system immediately.

- 1.4.5 CMI would like to be able to create, run and download general and specialized reports, eventually eliminating the need for isolated Excel spreadsheets. We would like to be able to save search templates and print results.
- 1.4.6 CMI needs a minimum of three (3) user groups.
- a) Super users (minimum 1) have access to all functionality and can make and manage user accounts, customize templates, create new fields and reports. The super user can customize the dashboards of the other users to display only what their permissions allows. This user can restrict records from public view.
 - b) Internal users (minimum 6) are staff who enter and edit records. They require advanced search and results functionality and can run reports. They can upload and download image/audio/video assets. They can create public and private online exhibits. This user can restrict records from public view.
 - c) External Users CMI requires public-facing portals with read-only access. These portals must:
 - i) incorporate CMI's brand elements (ie: logo; colours, font);
 - ii) include advanced search with filters;
 - iii) allow for browsing the image collection using thumbnails;
 - iv) comply with Web Content Accessibility Guidelines (WCAG).
 - v) use collections.pier21.ca and collections.quai21.ca for English and French language domains, respectively.
- 1.4.7 CMI would like to be able to track and collect anonymized data from the public facing web pages. We would like to report on metrics such as unique visitors; sessions; geo-locations, time on page; as well as, gain insights into how online visitors are interacting with our collection.
- 1.4.8 CMI requires the software includes an API (Application Programming Interface) that provides integration with our pier21/quai21.ca Drupal content management system. Interoperability of the collections management software is an important consideration for future compatibility.
- 1.4.9 CMI expects periodic releases of new software features and/or improvements as well as regular security updates.
- 1.4.10 CMI complies with the Official Languages Act. Compliance requires the public interface and functionality must be available in both official languages. CMI preserves a multilingual collection.
- 1.4.11 CMI will be required to comply with the Accessible Canada Act (Bill C-81). The software must follow the internationally accepted Web Content Accessibility Guidelines (WCAG).

1.4.12 CMI requires that the Proponent maintain current security practices and protocols to ensure our data is secure at all time.

a) Backups will be run nightly.

b) CMI requires that the system allow for manual backups and exports of our data alongside whatever automated backup solution is being used.

1.4.13 CMI expects hosting and application technical support be available via phone, email and/or ticketing system.

1.4.14 CMI expects the Proponent will provide thorough documentation and training on the solution.

2. Contract Terms and Conditions

2.2 Definitions

In this document:

- 2.1.1 The words “CMI” or “Museum” means the Canadian Museum of Immigration at Pier 21.
- 2.1.2 The words “Closing Date and Time” means the date and time set out on the cover page for the submission of Proposal(s) after which time no further proposals can be accepted.
- 2.1.3 The word “Agreement” or “Contract” means the agreement to be entered into between the successful Proponent and CMI for the services requested.
- 2.1.4 The word “Contractor” means the successful Proponent whose proposal is selected by CMI and enters into a Contract with CMI for the request herein.
- 2.1.5 The word “Proponent” means the vendor(s) who submit proposals for the request in this document.
- 2.1.6 The words “local time” mean the local time at the Museum’s address (Atlantic Time Zone).
- 2.1.7 The words “Proposal(s)”, “Bid(s)” and “Submission(s)” are to be considered as having the same meaning herein and refer to the submission by the Proponent to the request herein.
- 2.1.8 The word “RFP” means Request for Proposals.
- 2.1.9 The words “working language” refer to the working, everyday language internal to CMI. For the purposes of this document and subsequent contract, the working language is English.

2.3 Contact Term

The contract shall be for a term of 5-years with an option for CMI to renew for an additional 5 years.

2.4 Status of the Contractor

The Contractor is an independent contractor engaged by CMI to perform the Work. Nothing in the Contract is intended to create a partnership, a joint venture or an agency between CMI and the other Party or Parties. The Contractor must not represent itself as an agent or representative of CMI to anyone outside of the parameters of the Contract. Neither the Contractor nor any of its personnel is engaged as an employee or agent of CMI. The Contractor is responsible for all deductions and remittances required by law in relation to its employees.

2.5 Conduct of the Work

- 2.4.1 The Contractor represents and warrants that:
- a) it is competent to perform the Work;
 - b) it has everything necessary to perform the Work, including the resources, facilities, labour, technology, equipment, and materials; and
 - c) it has the necessary qualifications, including knowledge, skill, know-how and experience, and the ability to use them effectively to perform the Work.
- 2.4.2 The Contractor must:
- a) perform the Work diligently and efficiently;
 - b) except for Government Property, supply everything necessary to perform the Work;
 - c) use, as a minimum, quality assurance procedures and controls generally used and recognized by the industry to ensure the degree of quality required by the Contract;
 - d) select and employ a sufficient number of qualified people;
 - e) perform the Work in accordance with standards of quality acceptable to CMI and in full conformity with the specifications and all the requirements of the Contract;
 - f) provide effective and efficient supervision to ensure that the quality of workmanship meets the requirements of the Contract.
- 2.4.3 The Work must not be performed by any person who, in the opinion of CMI, is incompetent, unsuitable or has conducted themselves in an improper manner.

2.6 Legislative Requirements

The Contract shall be construed, interpreted and governed by the applicable laws in force in the Province of Nova Scotia and the laws of Canada applicable therein and the Courts of the Province of Nova Scotia shall have exclusive jurisdiction with respect to all matters relating to this contract.

The Contractor shall be responsible for compliance with all current Canadian Federal, Provincial and Municipal Acts, Orders, Regulations and Laws which exist or may come into existence during the term of the Agreement.

2.7 Liability

The Contractor is liable for any damage caused by the Contractor, its employees, subcontractors, or agents to CMI or any third party. CMI is liable for any damage caused by CMI, its employees or agents to the Contractor or any third party. The Parties agree that no limitation of liability or indemnity provision applies to the Contract unless it is specifically incorporated in full text in the Articles of Agreement. Damage includes any injury to persons (including injury resulting in death) or loss of or damage to property (including real property) caused as a result of or during the performance of the Contract. Where caused by the negligence or wilful misconduct of CMI or those for whom it is in law responsible.

2.8 Confidentiality

- 2.7.1 The Contractor must keep confidential all information provided to the Contractor by or on behalf of CMI in connection with the Work and all information conceived, developed or produced by the Contractor as part of the Work. Information provided to the Contractor by or on behalf of CMI must be used solely for the purpose of the Contract and remains the property of CMI.
- 2.7.2 Subject to the Access to Information Act, R.S.C. 1985, c. A-1, and to any right of CMI under the Contract to release or disclose, CMI agrees not to release or disclose outside the Government of Canada any information delivered to CMI under the Contract that is proprietary to the Contractor or a subcontractor.
- 2.7.3 The obligations of the Parties set out in this section do not apply to any information where the same information:
- a) is publicly available from a source other than the other Party; or
 - b) is or becomes known to a Party from a source other than the other Party, except any source that is known to be under an obligation to the other Party not to disclose the information, or
 - c) is developed by a Party without use of the information of the other Party.

2.9 Insurance

Prior to the implementation of the Contract, the Contractor shall provide proof of relevant insurance policies upon the request of CMI. These insurance policies will be at a level appropriate to carry out the services herein.

2.10 Notices

Any notices required or permitted to be given by the Contractor or CMI shall be deemed to have been properly and effectively given if delivered personally, sent by facsimile, sent by e-mail or sent by registered prepaid mail to the party whom the notice is to be given.

2.11 Changes, Alterations, Amendments

Changes in the terms and conditions of the Contract may be made only by written agreement of the parties.

2.12 Termination

In the event that either party believes that the other materially has breached any obligations under the contract such party shall so notify the breaching party in writing. The breaching party shall have 30 days from the receipt of notice to cure the alleged breach and to notify the non-breaching party in writing

that a cure has been effected. If the breach is not cured within the 30 days, the non-breaching party shall have the right to terminate the contract without further notice.

2.13 No Promotion of Relationship

Any publicity or publication related to the contract shall be at the sole discretion of CMI. Without limiting the foregoing, the Contractor shall not make use of its association with CMI, directly or indirectly communicate with the media in relation to the contract, the subject matter, or undertake any communication with CMI that in the opinion of CMI is unsolicited promotional communication relating to the contract, without prior written consent of CMI.

2.14 Gender

In the Contract, unless the context otherwise requires, words importing gender include all genders.

2.15 Force Majeure

The Contractor is not liable for failure to perform the obligations as set out in the contract as a result of acts of God (including fire, flood, earthquake, storm, hurricane or other natural disasters), war, invasion, act of foreign enemies, labour dispute, strike or lockout. If the Contractor asserts Force Majeure as an excuse for failure to perform their obligations, they must prove that reasonable steps were taken to minimize delay or damages caused by foreseeable events, that the Contractor substantially fulfilled all non-excused obligations and CMI was timely notified of the likelihood or actual occurrence of the event which invoked the Force Majeure.

2.16 Indemnity

The Contractor shall indemnify and hold harmless CMI, its agents and employees from and against any and all claims, demands, losses, costs, damages, actions, suits or proceedings by third parties that arise out of, or are attributable to, the successful Bidder's performance of the contract.

3. RFP Submission Information

3.2 Key Dates

RFP Release Date	October 18, 2019
Deadline for Question	October 30, 2019
RFP Closing Date	November 20, 2019
Selected software demonstration by teleconference	November 27, 2019
Contract Award (Estimated)	December 4, 2019
Kick off meeting	December 9, 2019

3.3 Form of Submission

3.2.1 Submittal Documentation Form:

The Proponent must submit a proposal with all the mandatory information requested in this RFP. Proponents shall submit Section 5, RFP Submittal Documentation. CMI hours of operation are Monday through Friday, 9:00 am to 4:00 pm local time (ADT). All submissions will receive a date/time stamp to judge the time for the submission closure.

3.2.2 Language:

Proposal documents and supporting information may be submitted in either English or French. The working language of the Contract shall be English.

3.4 Proposal Submission Instructions

Proposals shall be delivered ONLY to the address specified below. CMI requires one (1) original and four (4) copies.

Procurement and Administration Manager
Canadian Museum of Immigration at Pier 21
1099 Marginal Road, 2nd Floor
Halifax, NS B3H 4P7

Proposals must be submitted and received by November 20, 2019 at 2:00 p.m. Atlantic Time (ADT). Faxes and/or emails of proposals will not be accepted. Timely receipt and correct direction of proposals shall be the sole responsibility of the Proponent.

3.5 Proponent Enquiries

3.4.1 To ensure consistency and quality of information provided to all, the Procurement and Administration Manager will provide relevant information in respect to enquiries/questions received and the replies to such enquiries/questions without revealing the sources of enquiries on buyandsell.gc.ca. Relevant enquires regarding the solicitation shall be submitted by October 23, 2019 at 2:00 p.m. Atlantic Time (ADT. Questions received after this time will not be answered. Answers to questions will be provided on an ongoing basis and will be issued as addenda.

3.4.2 Proponents are only permitted to communicate with the Procurement and Administration Manager. Non-compliance with this condition during the solicitation period may (for that reason alone) result in disqualification of the Proponent's proposal. Direct enquiries to:

Procurement and Administration Manager
Email: procurement@pier21.ca

3.4.3 Proponents shall promptly examine all documents and addenda comprising this RFP and shall report any errors, and seek clarification of apparent errors, ambiguities, or other problems as soon as identified. It is the Proponent's responsibility to avail themselves of all the necessary information to prepare a compliant proposal in response to this RFP. The Evaluation Committee is under no obligation to seek clarification of a Proponent's proposal.

3.6 Joint Ventures

3.5.1 The Proponent must clearly and explicitly state whether the bidding entity is or is not a joint venture in accordance with the definition below:

- a) A joint venture is an association of two or more parties who combine their money, property, knowledge, skills, time or other resources in a joint business enterprise agreeing to share the profits and the losses and each having some degree of control over the enterprise. Joint ventures may be carried on in a variety of legal forms divided into three categories:
 - i) The incorporated joint venture.
 - ii) The partnership joint venture.
 - iii) The contractual joint venture where the parties combine their resources in the furtherance of a single business enterprise without actual partnership of the corporate designation.

3.5.2 If the response to this RFP is made by a joint venture, the Proponent shall describe the precise nature of the joint venture, its legal status and its acceptance of the following general principles:

- a) That the signatories are acting and responsible jointly and severally;
- b) That the payment of monies under the contract to the identified lead member shall act as a release from all parties;

- c) That giving notice to CMI to the identified lead member shall act as a notice to all parties;
- d) That CMI may, at its discretion in the event of disputes among joint venture parties or changes in its composition, direct that the contract be terminated, without in any way altering the liability of the original signatories for performance of the terms of the contract; and
- e) Where CMI has determined that the joint venture lacks sufficient assets to guarantee its contract performance, financial and performance guarantees may be required from each of the joint venture members.

3.5.3 It is a condition precedent to any contract being awarded to a Proponent that the Proponent provides a copy of the signed Joint Venture Agreement (or equivalent document which defines the participant's roles and responsibilities) if the Proponent is bidding as a joint venture (as defined above).

3.7 Amendments, Withdrawal and Disqualification

- 3.6.1 The Proponent may amend its Proposal at any time up to the Submission Deadline by submitting a sealed, replacement proposal. The envelope with the latest date and time will be accepted and any other submissions prior will be returned. Those Proponents wishing to withdraw their proposal can follow the exact process. The replacement proposal will simply include a one page letter, signed by your authorized company representative, informing The Canadian Museum of Immigration at Pier 21 that the Proponent wishes to withdraw its proposal from the competition.
- 3.6.2 After the closing date and time, amendments to a proposal will not be accepted. In the event that a Proponent wishes to withdraw its Proposal, the Proponent shall immediately notify the Procurement and Administration Manager in writing or by email, before the RFP closing date. Should a proposal be withdrawn, it will be returned to the Proponent after the closing date, and no further consideration will be given to it.

3.8 Costs Related to Submission process

All costs and expenses incurred by the Proponent related to the preparation of the proposal shall be borne by the Proponent. CMI is not liable to pay such costs and expenses or to reimburse or to compensate the Proponent under any circumstance. CMI shall not be responsible for any costs related to any delays in the RFP, in awarding the agreement, or costs associated with any review or the evaluation process.

3.9 Conflict of Interest

Proponents must fully disclose, in writing to the Procurement and Administration Manager, any circumstances of any possible conflict of interest or what could be perceived as a possible conflict of interest if the Proponent were to become a contracting party pursuant to the RFP. The Evaluation Committee shall review any submissions by Proponents under this provision and may reject any proposals

where, in the opinion of the Committee, the Proponent could be in a conflict of interest position if the Proponent were to become a contracting party pursuant to this RFP.

3.10 Access to Information

The individuals, or companies, participating in this RFP acknowledge and understand that CMI is subject to the Privacy Act and Access to Information Act, and it may, as a result of specific request made under the Act, be required to release this complete document or any other documents it has received related to this RFP. Participants in this process should clearly indicate “Confidential” on items within their submission considered to be company confidential or proprietary information.

3.11 CMI’s Rights

- 3.10.1 This RFP does not constitute an offer of any nature or kind whatsoever by CMI to any Proponent. CMI reserves the right to reject all proposals, in whole or in part, at the sole discretion of CMI.
- 3.10.2 CMI reserves the right to disqualify any Proponent in the event that its response to the RFP indicates that the manner in which the Proponent provides services may adversely affect CMI’s existing business relationships or if Public Services and Procurement Canada (PSPC) has determined the Proponent to be ineligible or suspended pursuant to the PSPC Integrity Regime.
- 3.10.3 Notwithstanding any other provision contained in this RFP, CMI may waive minor irregularities or non-compliance in Proposals from the exact requirements set out in the RFP.
- 3.10.4 Furthermore, CMI reserves the right to:
- a) Ask any Proponent to provide proof that they have the necessary management structure, skilled personnel, experience and equipment to perform competently the work identified in this RFP.
 - b) Cancel and/or reissue this RFP at any time; CMI will not assume liability for any response preparation costs whatsoever.
 - c) Request clarification or supporting data for any point in a Proponent’s proposal.
 - d) Make changes to this RFP, including substantial changes provided that those changes are issued by way of a Solicitation Amendment in writing, and is issued prior to the RFP closing date. CMI may do so without incurring any liability whatsoever to any of the Proponents.
 - e) Maintain sole ownership of the proposals. All materials submitted by a Proponent in response to any part of this RFP shall become the sole property of CMI without payment or liability for payment.

4. Evaluation and Award

4.1 Evaluation Criteria and Process

4.1.1 Criteria and Scoring

There shall be no public opening of the proposals received in response to this RFP. The criteria specified in this RFP, as possibly amended by Solicitation Amendments, are the sole criteria which will be used in the evaluation of proposals. Proposals will be evaluated and scored in accordance with the following criteria. RFP Submittal Documentation (Section 5) must be included in order to be considered.

Criteria	Points
Company Introduction & Cover Letter (Section 5.3)	10 pts
Project Team (Section 5.4)	10 pts
Pricing & Fees (Section 5.5)	25 pts
Technical & Functional Requirements (Section 5.6)	45 pts
References (Section 5.7)	10 pts
Preliminary Evaluation Score (proposal criteria)	/100 pts
<i>The top two (2) scoring Proponents will proceed to a software demonstration.</i>	
Secondary Evaluation Score (software demonstration)	/100 pts
Total Evaluation Score	/200 pts

4.1.2 Process

An Evaluation Committee shall evaluate the proposals. Decisions as to the degree to which a proposal meets the requirements of this RFP are within the exclusive judgment of the Evaluation Committee.

The Evaluation Committee shall conduct a Preliminary Evaluation of each Proponent. Proponents who receive the highest or second highest score out of the in the Preliminary Evaluation round shall be eligible for Secondary Evaluation. The degree to which a Proponent's proposal is acceptable is at the sole discretion of the Evaluation Committee.

The Evaluation Committee will contact the top two (2) Proponents from the Preliminary Evaluation for Secondary Evaluation – Software Demonstrations. Total scores shall be calculated by adding Preliminary and Secondary scores together. The Proponent with the highest score overall shall be recommended for contract award.

4.2 Notification, Award and Debriefing

CMI will provide a debriefing of a Proponent's proposal, if requested in writing within ten (10) days of notification that they have been unsuccessful. Requests must be submitted to the Procurement and Administration Manager.

5. RFP Submittal Documentation

5.1 Company Information

Please submit information as per this table.

Legal Name:
Full Address:
Telephone:
Website:
Name and title of person authorized to sign on behalf of the Proponent (Type or Print)
Signature of person authorized to sign on behalf of the Proponent
Name and title of RFP Contact / Account Manager (Type or Print)
Phone:

5.2 Addenda

Addenda may be issued by CMI regarding any changes to the solicitation documents and to provide answers to questions that may arise during the solicitation period. Completion of this section will ensure that you have received and factored this information into your tender total. Failure to identify addenda issued by CMI may result in the disqualification of your proposal.

Number	Date Issued

5.3 Cover Letter

Please provide a cover letter introducing your firm. Please confirm your interest in assisting our team with this project.

In addition to your cover letter, ensure that you provide the following:

- a) Company Name
- b) Corporate History
- c) Number of employees
- d) Office locations in Canada
- e) Office that will Service and Support

5.4 Project Team

Identify each member of your team and their role on the Project. Provide a C.V. or brief profile of each member on your Project team, describing their relevant skills and experience.

5.5 Pricing and Recurring Fees

Provide details of how your firm will be remunerated should you be selected. Use Canadian dollars exclusive of tax and base your estimates on typical start-ups.

- 5.5.1 Provide a detailed break down for one-time/start-up costs as follows:
- a) Standard rates for data conversion.
 - b) Standard rates for configuration, report building, training, etc.
 - c) Estimate costs for data migration and implementation.

5.5.2 Please provide costs associated with an annual subscription (Hosted/SaaS) assuming a five-year contract period. Describe all of the costs associated with a single instance of your software. Please include the following:

- a) Minimum of seven (7), simultaneous, users with data entry/administrative privileges
- b) Number of portals (dashboards), reports, templates
- c) Support packages
- d) Software updates
- e) Hosting and disk storage capacity
- f) SSL encryption
- g) Additional storage, if available

5.6 Technical and Functional Requirements

- 5.6.1 CMI has completed the Collections Management Software Criteria Checklist (“CMSCC”) and attached it to this RFP as APPENDIX A. Complete the Proponent portion in the same document. Please preserve CMI’s answers in the copy submitted as part of the RFP response. Failure to respond to item 5.6.1 will result no further consideration being given to your Proposal.
- 5.6.2 Describe in detail your technical support options and/or packages and include average response time. Please attach a copy of your Service Level Agreement.
- 5.6.3 Describe in detail the hosting solution you are using. We are interested to know the specifics of the datacentre(s), their locations, their physical security, their failover/backup/redundancy systems and storage capacity. Include Backup and Security policies.
- 5.6.4 Based on our description of user levels expectations in item 1.4.6, Scope of Work, describe how your software user levels and permissions can accommodate our needs. Include the number of simultaneous user accounts allowed.
- 5.6.5 Indicate which WCAG level of website accessibility the software has achieved. Note if the public facing pages have a different level than the administration pages.
- 5.6.6 Provide details, and date, of the most recent software release that included new features/improvements. Please provide details of the next planned release of new features/improvements. Highlight changes specifically addressing accessibility (WCAG).
- 5.6.7 Briefly describe your API. Include:
 - a) standards used for access and identity;
 - b) whether the API can leverage open source tools;
 - c) how secure communication is enforced;
 - d) disclose any limits on usage/queries.

- 5.6.8 Provide a schedule of work immediately following the contract award including kick-off meeting, assessment of data, software customization, migration, testing and review, training and launch.

5.7 References

Provide two (2) references from clients that currently use your software. Include the name and telephone number of the contact person for each. CMI will respect the confidentiality of your document.

5.8 Supplier Statement

Complete the following:

WE: _____ (Supplier Name)

- 5.8.1 DO HEREBY OFFER to the Canadian Museum of Immigration at Pier 21 to diligently and faithfully provide the services in accordance with the terms and conditions of the RFP.
- 5.8.2 AND WE HEREBY AFFIRM AND CERTIFY that we:
 - i. Have examined to our satisfaction all conditions affecting the Scope of Work.
 - ii. Have carefully studied the RFP, including all addenda.
 - iii. Have not relied on any information or documents provided by or on behalf of CMI other than the RFP.
 - iv. Have included the information that was required to be submitted, which information forms an integral part of the Submittal Documentation.
- 5.8.3 AND WE HEREBY DECLARE, REPRESENT, WARRANT AND AGREE THAT:
 - i. The Proposal has been executed with full authority and is irrevocable, valid and open to acceptance by CMI for a period of ninety (90) full days from the Closing Date irrespective of the acceptance of any other Proposal or the issue of a notice of acceptance of another Proposal.
 - ii. This Proposal is made by the undersigned without any connection, knowledge, and comparison of figures or arrangements with any other person who might submit a Proposal for the same Work and is in all respects fair and without collusion or fraud.

Identify each member of your team and their role on the Project. Provide a C.V. or brief profile of each member on your Project team, describing their relevant skills and experience.

5.9 Declarations

Complete the following:

I declare that the information given is true to the best of my knowledge and belief.

Date: _____

Company Name: _____

Authorized Name (Printed): _____

Authorized Signature: _____

Title: _____

Phone Number: _____

E-mail: _____

Failure to declare Conflict of Interest may result in the exclusion of you and your company from providing services to CMI.

This page must be completed and returned with your proposal for your bid to be accepted.

6. Appendix A

Canadian Museum of Immigration at Pier 21, *Collections Management Software Criteria Checklist*

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Collections Management Software Criteria Checklist

Instructions: Please fill out the “Yes”, “No”, and “Comments” columns. If the Collections Management Software can complete a criteria listed below, please place a “Y” in the corresponding “Yes” column. If the software cannot complete a criteria, please place an “N” in the corresponding “No” column. Please only leave comments in the “Comments” column if an answer needs additional explanation.

Please preserve CMI’s columns and answers. Completing and submitting this document as part of the RFP response is mandatory.

Note: Rows with dashes (-) are definitions and do not need to be filled out.

Section A: Core Collections Management Criteria

Criteria	Description	CMI: Requirement	CMI: Nice to Have	CMI: Not Applicable	Proponent: Yes	Proponent: No	Proponent: Comments
1 Management of Objects	-	-	-	-	-	-	-
1.1 Object Entry Process	The management and documentation of the receipt of objects that are not currently part of the collections. These objects may or may not eventually be accessioned.	-	-	-	-	-	-
1.1.1 Uniquely identify objects on deposit	The system can uniquely identify newly received objects or object lots, and assign a unique local deposit number which can be differentiated from accession numbers.	X					

1.1.2 Acquisition or loan records	The system can use entry records as a basis for acquisition or loan records.	X					
1.1.3 Account for objects	The system can ensure that the institution is able to account for all objects or object lots on deposit with identifying data (e.g. owner name, depositor name, location, unique identifier, number of lots, return date).	X					
1.1.4 Receipts	The system can provide a receipt for the owner of the objects or object lots on deposit.		X				
1.1.5 Establish an institution's liability	The system can help to establish the extent of the institution's liability for deposited objects or object lots (e.g. reference to paper file with signed deposit documents).		X				
1.1.6 Record reason for deposit of object	The system can link the deposit of the objects or object lots to a type of event (e.g. valuation, conservation treatment, identification or potential acquisition.)	X					

1.1.7 Finite end to deposit	The system can allow the user to designate a finite end to the period that objects or object lots are temporarily deposited with an institution.		X				
1.1.8 Notification of end to deposit	The system can provide notification about the end of a deposit (e.g. a reminder that the user has to do something, or generate a report).	X					
1.1.9 Objects returned to owner	The system can record that deposited objects or object lots have been returned to the owner as required (e.g. track that the objects have been returned with a return date).	X					
1.2 Acquisition Process	The management and documentation of the addition of objects or object lots to the collection.	-	-	-	-	-	-
1.2.1 Basic Information captured	The system records basic information, determined by the institution, about the object or object lot, e.g. Object number, object name, brief description, number of objects, acquisition date, acquisition method, acquisition source, transfer of	X					

	title, current location, location data and permanent collection						
1.2.2 Accession by lot	The system can accommodate accessioning by object lot. This means that it can assign a unique local number to a group of objects that are being accessioned together. The separate objects in the lot may eventually be numbered separately.	X					
1.2.3 Unique system number assigned	The system can ensure that a unique system number is assigned to all objects or object lots.	X					
1.2.4 Local unique numbers	The system can accommodate non-system local unique numbering systems (e.g. accession numbers in a wide variety of formats, Borden numbers).	X					
1.2.5 Previous number	The system can document previous number(s) assigned to the acquired objects or object lots.	X					

1.2.6 Source	The system can record source information (e.g. acquisition source, title, surname, address) about objects or object lots.	X					
1.2.7 Justification of acquisition	The system can record the justification for acquisition of an object or object lot (e.g. reason for acquisition, supporting documentation).	X					
1.2.8 Title transfer	The system can note the transfer of title to the acquiring institution (e.g. method of acquisition, evidence of original title, signature confirming transfer of title, brief description of objects or object lots, and previous owner information).	X					
1.2.9 Accessions register maintained	The system can ensure that an accessions register is maintained, describing all acquisitions and listing them by number.	X					
1.3 Inventory Control Process	The maintenance of up-to-date information identifying all objects or object lots for which the institution has a legal responsibility, including objects on	-	-	-	-	-	-

	loan, not-yet-accessioned, or previously undocumented items and enquiries.						
1.3.1 Object location	The system can document details about the current location of objects or object lots.	X					
1.3.2 Object status	The system can indicate the status of all objects or object lots. For example, indicate whether the object or object lot is accessioned, not-yet-accessioned, loaned, exhibited, deaccessioned or missing).	X					
1.3.3 Basic physical inventory	The system can record basic physical inventory information (e.g. record location, date inventoried, staff name).	X					
1.3.4 Spot-checking (verifying inventory information)	The system can document the process of spot-checking to verify the location of an object or object lot, and other inventory information (e.g. record the date checked, checker's name).			X			

1.3.5 Distinguish between spot check and inventory	The system can distinguish between information that has been gathered during an inventory, and during a spot check (e.g. field identifying whether the information was gathered during inventory or during spot check, or separate fields for inventory and spot check information).			X			
1.4 Location & Movement Control Process	The documentation and management of information concerning the current and past locations of all objects/object lots in the institution's care to ensure that the institution can locate any object at any time.	-	-	-	-	-	-
1.4.1 Record of permanent location	The system can provide a record of the location where an object or object lot is normally displayed or stored (e.g. permanent location).	X					
1.4.2 Location field	The location field can be made mandatory, even if a location is 'unknown'.	X					

1.4.3 Location search	The system can retrieve information about objects or object lots by location.	X					
1.4.4 Unique local number search	The system can enable access to location information by unique local number (e.g. Borden number, accession number).	X					
1.4.5 Record of displaced objects	The system can provide a record of the location of an object or object lot when it is not in its previously assigned location (e.g. current location).	X					
1.4.6 Previous location field	The system can ensure that when an object or object lot is relocated the previous location details, including date, are automatically transferred to a previous location field.		X				
1.4.7 Date moved field	The "date moved" field is maintained automatically.		X				
1.4.8 Override date moved field	There is a provision to override the "date moved" field.	X					
1.4.9 Location of parts	The system can attach distinct locations to parts of a single object, or single items within an object lot (e.g. indicate that the	X					

	teapot is on display, but the rest of the tea set is in storage).						
1.4.10 Group relocation	The system allows for the relocation of a group of objects, including parts of a single object or items within an object lot, by globally changing the location while still maintaining controls and authorizations.	X					
1.4.11 Temporary location	The system can issue a notification when temporary time limits on locations have been reached.	X					
1.4.12 Person responsible	The system can record the person who moved objects or object lots.			X			
1.4.13 Authorizing movements	The system can note the members of staff responsible for authorizing movements of objects or object lots.			X			
1.4.14 History of authorization for object movement	The system can record the history of authorization of movements of objects or object lots.			X			

1.4.15 Transfer	The system allows the transfer of responsibility for objects or object lots between collections within the institution (e.g. transfer from costume to ethnology collection).			X			
1.4.16 Movement audit trail	The system can provide an audit trail for any movement of objects or object lots across the physical or administrative boundaries of the organization.			X			
1.4.17 Handling and packing	The system can document information about the handling, packing, storage and display of objects or object lots.		X				
1.4.18 History of movement	The system can record an unlimited number of previous locations for an object or object lot.		X				
1.5 Cataloguing Process	The compilation and maintenance of primary information describing, formally identifying, or otherwise relating to objects in the collection.	-	-	-	-	-	-
1.5.1 Ownership	The system can provide reference to ownership of the object or object lot.	X					

1.5.2 Object history	The system can document the history of the object or object lot (e.g. historical data).	X					
1.5.3 Ownership history	The system can document the history of the ownership of objects or object lots.			X			
1.5.4 Scholarly research	The system allows information produced by researchers to be recorded (e.g. reference to research files, or actual research data).	X					
1.5.5 Publication and scholarly research history	The system can record references to the object that appear in publications and information produced by researchers.	X					
1.5.6 Frames and other supports	The system can document information about frames and other supports.		X				
1.5.7 Reference to files	An object record can include references to documents or records outside of the collections system.		X				
1.5.8 Whole or parts relationships	The system allows for the management of information about relationships between parts of a single object, between single items within an object	X					

	lot, and between multiple objects.						
1.6 Conservation Management Process	The documentation and management of information about the conservation of objects from a curatorial and collections management perspective.	-	-	-	-	-	-
1.6.1 Request for conservation	The system can record request or recommendations about conservation work for an object, object part, or object lot.		X				
1.6.2 Examinations	The system can record the process and results of conservation examinations and any supporting documentation held by the institution, such as archival materials or contracts.		X				
1.6.3 Preventive measures	The system can record any preventative measures that are taken and any supporting documentation held by the institution, such as archival materials or contracts.		X				

1.6.4 Treatments	The system can record any remedial treatment and any supporting documentation held by the institution, such as archival materials or contracts.		X				
1.6.5 Conservation history	The system can document the history of the conditions and treatments of an object.	X					
1.6.6 Notification of treatment call-backs	The system can send an email or other notification triggered by an event in the conservation workflow (e.g. 5 years after an object is repaired or examined).			X			
1.6.7 Access to information by unique local number	The conservation information is accessible via the object's unique local number (Borden number, accession number, etc.).	X					
1.7 Risk Management Process	The management and documentation of information relating to potential threats to an institution's own collection and the objects and object lots for which it is temporarily responsible.	-	-	-	-	-	-

1.7.1 Information on threats	The system can document information relating to potential threats to an institution's collections.			X			
1.7.2 Preventative measures	The system can document information on preventive measures.			X			
1.7.3 Contacts and procedures	The system can maintain files of individuals and organizations to approach, and procedures to be followed in the event of a disaster.			X			
1.7.4 Accountability	The system can enable accountability for any object or object lot during and after a disaster (e.g. generate lists of objects by location, condition, or institution's liability).	X					
1.8 Insurance Management & Valuation Control Process	The documentation and management of the insurance needs of objects in an institution's permanent collection, and those for which it is temporarily responsible (such as loans or deposits). Valuation control is the management of information relating to	-	-	-	-	-	-

	the valuations placed on individual objects or groups of objects, normally for insurance/indemnity purposes.						
1.8.1 Appraisal	The system can document information about appraisals.		X				
1.8.2 Appraiser	The system can document information on people who perform appraisals.			X			
1.8.3 Value history	The system can document information relating to the history of valuation placed on individual objects, object lots or other groupings of objects.			X			
1.8.4 Valuation information confidentiality	The system can help to ensure that valuation information is treated in confidence and not released to anyone without the appropriate authority (e.g. only authorized users can access the valuation information).			X			

1.8.5 Objects appropriately insured	The system can check that all the objects in an institution's care are appropriately insured (e.g. report on insurance values, policy numbers, and policy expiry dates).	X					
1.8.6 Insurance claim	The system can document all decisions and actions in the institution's response to insurance claim(s) including cross reference to paper files.		X				
1.8.7 Notification of renewal	The system can provide notification when insurance policies need to be reviewed and renewed (e.g. a reminder that the user has to do something or generate a report).		X				
1.9 Exhibition Management Process	The management and documentation of temporary exhibitions and permanent displays from the curatorial and collections management perspective.	-	-	-	-	-	-
1.9.1 Exhibitions & Displays process	The system supports the management and documentation of both analog and digital exhibitions.		X				

1.9.2 Analog and Digital Exhibitions	Analog and digital exhibits can be coordinated or managed separately.		X				
1.9.3 Object reservation	The system can place notices of reserves of objects or object lots for special events.			X			
1.9.4 Document research	The system can document research for an exhibition or display.		X				
1.9.5 Exhibition tracking	The system can document information about an exhibition's itinerary.	X					
1.9.6 Object exhibition history	The system can document the history of exhibition activities.	X					
1.9.7 Exhibition history of objects	The system can document the exhibition history of specific objects.	X					
1.9.8 Online Exhibit Management	The system can create accessible web pages for online/digital exhibits.	X					
1.10 Dispatch Process	The management and documentation of objects or object lots leaving the institution's premises.	-	-	-	-	-	-

1.10.1 Location information about accessioned objects	The system can maintain location information for accessioned objects or object lots leaving the institution's premises.	X					
1.10.2 Location information about un-accessioned objects	The system maintains location information for un-accessioned objects or object lots leaving the institution's premises.		X				
1.10.3 Responsibility	The system can record information about persons responsible for authorization of the dispatch of objects or object lots.			X			
1.10.4 Transportation	The system can document details about transportation of objects or object lots.		X				
1.11 Borrowing and Loaning		-	-	-	-	-	-
1.11.1 Borrowing	Managing and documenting the borrowing of objects for which the institution is responsible for a specific period of time and for a specified purpose, such as display, research, education, or photography.	-	-	-	-	-	-

1.11.1.1 Automatic loan number	For incoming loans, the system can automatically assign a unique loan number to objects or object lots within the loan.	X					
1.11.1.2 Establish periods	The system can designate fixed periods for incoming loans.		X				
1.11.1.3 Special considerations	The system can document special considerations regarding borrowed objects or object lots (e.g. maintain information about security requirements).	X					
1.11.1.4 Loaned objects	The system can manage individual objects within an incoming loan (e.g. one object from a group of loaned objects to be returned sooner than the rest).		X				
1.11.1.5 Generate loan-in agreements	The system can generate incoming loan agreements to be signed by both borrower and lender before the loan commences.		X				
1.11.2 Loaning	Managing and documenting the loaning of objects to other institutions for a specific period of time and for a specific	-	-	-	-	-	-

	purpose, such as display, research, education, or photography.						
1.11.2.1 Automatic loan number	For outgoing loans, the system can automatically assign a unique loan number to objects or object lots within the loan.		X				
1.11.2.2 Establish periods	The system can designate fixed periods for outgoing loans.	X					
1.11.2.3 Special considerations	The system can document special considerations regarding loaned objects or object lots (e.g. maintain information about security requirements).		X				
1.11.2.4 History	The system can document the history of outgoing loans for each object or object lot within the loan.		X				
1.11.2.5 Loaned objects	The system can manage individual objects within an outgoing loan (e.g. one object from group of loaned objects to be returned sooner than the rest).		X				

1.11.2.6 Generate loan agreements	The system can generate outgoing loan agreements to be signed by both borrower and lender before the loan commences.		X				
1.11.2.7 Record of loans	For outgoing loans, the system can maintain a record of all loans, including details of the borrower, the venues, the loan period and the purpose of the loan.	X					
1.11.2.8 Payments	For outgoing loans, the system can record and calculate payments by the borrowers.			X			
1.11.2.9 Overdue loans	For outgoing loans, the system can track any objects or object lots within an outgoing loan that are overdue.			X			
1.11.3 Logistics of Loans	The handling and insuring of objects loaned or borrowed.	-	-	-	-	-	-
1.11.3.1 Insurance activities	For incoming and outgoing loans, the system can record insurance activities such as requirements, insurer, appraisers, valuation, etc.		X				

1.11.3.2 Shipping activities	For incoming and outgoing loans, the system can record shipping activities such as schedules and references to files.			X			
1.11.3.3 Link objects to cases	For incoming and outgoing loans, the system can link objects to packing cases.		X				
1.11.3.4 Location tracking	For incoming and outgoing loans, the system can track the location of objects or object lots while on loan.		X				
1.11.3.5 Packing cases	For incoming and outgoing loans, the system can track the location of packing cases.		X				
1.11.3.6 Packing list	For incoming and outgoing loans, the system can generate packing lists.		X				
1.11.3.7 Associated costs	The system can record and calculate costs associated with incoming and outgoing loans.		X				
1.12 Process of Deaccession & Disposal	The management of object disposals (transfer, sale, exchange, or destruction) and deaccessions (documentation of the disposal).	-	-	-	-	-	-

1.12.1 Transfer of title	The system can record the transfer of title to any receiving institution.		X				
1.12.2 Approval	The system can ensure that deaccessioning does not occur without approval being recorded.	X					
1.12.3 Legal title	The system can ensure that the institution has legal title to the object or object lot before commencing with deaccession or disposal (e.g. will not allow user to fill in deaccession or disposal fields unless the institution has demonstrated legal title).		X				
1.12.4 Audit trail	The system can keep an audit trail on objects or object lots that have been disposed of.		X				
1.12.5 Reason for disposal	The system can document the reason for disposal	X					
2 Management of Metadata	-	-	-	-	-	-	-

2.1 Metadata Administration	The way in which metadata is stored, tracked and recognized	-	-	-	-	-	-
2.1.1 Metadata standards	The system can follow more than one standard for recording metadata about multimedia files. In the comment field, list the standards (e.g. NISO standard, MPEG-7, DIG35, IPTC).	X					
2.1.2 Metadata import/export	The metadata about multimedia files can be imported/exported (e.g. EXIF).	X					
2.1.3 Metadata search	The metadata about multimedia files can be searched (e.g. the user wants to find all the images created with a Canon scanner).	X					
2.1.4 Recognition of metadata	The system can recognize existing metadata produced by digital equipment (e.g. recognize and automatically read in metadata produced by a digital camera).	X					
2.1.5 Language of metadata	The system flags the language of the metadata.	X					

2.1.6 Display of metadata	Users can view metadata for specified data fields, such as classification fields, and files, such as image files.	X					
2.2 Multimedia Files	The support and handling of metadata for multimedia files.	-	-	-	-	-	-
2.2.1 Indexing	Multimedia files are indexed.	X					
2.2.2 Sound files	The system supports sound files (*.wav, *.au, etc.). In the comment field, list the formats supported.	X					
2.2.3 Associated sound files	The system can associate (link) sound files to an object.	X					
2.2.4 Image Files	The system supports image files (*.jpg, *.gif, *.tif, etc.). In the comment field, list the formats supported.	X					
2.2.5 Associated image files	The system can associate image files to an object and the image files can be viewed within the system.	X					
2.2.6 Streaming Data files	The system can accept and deliver streaming data.	X					

2.2.7 Associated streaming data files	The system can associate link streaming data files to an object.	X					
2.2.8 Animation files	The system supports Flash and non-Flash content.		X				
2.2.9 Associated animation files	The system can associate (link) animation files to an object.	X					
2.2.10 3-D images	The system supports 3-D imaging. (*.mov, *.dwg).		X				
2.2.11 Associated 3-D files	The system can associate (link) 3-D files to an object or object lot.	X					
2.2.12 Other files	Other multimedia formats are supported, including the following files formats: Pro Res mp4 H.264 Ogv Ogg Wave Mp3 Web(m) Mov/Quicktime	X					
2.2.13 View both images and text	The system allows images and text to be viewed together on the same screen.	X					

2.2.14 Automatic production of multiple image resolutions	The system can automatically produce images into multiple resolutions for display within the system, for reports generated by the system or for export.	X					
2.2.15 Options for display of images	Users have access to non-destructive editing features, such as dynamic rotate or resizing, that only change the way the image is displayed.		X				
2.2.16 Image captions	The system can record a caption that is to be displayed with the image.	X					
2.2.17 Images per object	The system can associate multiple images with an object.	X					
2.2.18 Maximum images	The supplier can provide the institution with information about the maximum number of images that can be associated with an object.	X					
2.2.19 Tiling of images	The system can tile multiple images on the screen.		X				
2.2.20 Images stored in CMS	The database is capable of containing image files.			X			

2.2.21 Convert images	The system allows images to be converted to multiple image file formats and resolutions.	X					
2.2.22 Reference to original images	The system can document information about the original image (e.g. image reference number, classification, storage location).	X					
2.2.23 Retrieval by image characteristic	The system can enable image retrieval by image characteristic (e.g. find images of objects that are a certain colour (blue), shape (round) or layout (portrait/landscape)).	X					
2.2.24 Search object and image info	The system can search object information and image information at the same time (e.g. search for the name of a photographer in both object record and image record).	X					
2.2.25 Image editing	The system can provide functionality for editing digital images (e.g. colour correct, rotate, resize, resample).		X				
2.2.26 Management of digital files	The system can rename, move, copy digital object files (.WAV, .AVI, .JPG, etc.).	X					

2.2.27 Multimedia plug-ins	The system can use plug-ins required by the institution.	X					
2.3 Data Field Structure	The way in which data fields are defined.	-	-	-	-	-	-
2.3.1 Date	Date format can be defined by the institution (yyyymmdd etc.).	X					
2.3.2 Money	Money (\$99999.99) with the number of characters (e.g. 12) required by the institution.		X				
2.3.3 Variable-length fields	All fields can be stored as variable length fields.	X					
2.3.4 Fixed length fields	A field can be defined as fixed length when needed.	X					
2.4 Data Validation		-	-	-	-	-	-
2.4.1 Numeric	Numeric values can be validated (e.g. integer only for a specific field such as number of items in a lot).	X					

2.4.2 Real	The system can validate real values (e.g. decimal numbers).	X					
2.4.3 Alphabetic	Alphabetic values can be validated.	X					
2.4.4 Upper/lower case	The system can validate that values are the correct mix of upper or lower case (e.g. Borden number = AaAa).	X					
2.4.5 Date	The system can validate date values as defined by the institution.	X					
2.4.6 Data Entry Tools	The system supports data entry tools to facilitate validation (e.g. date pickers).	X					
2.4.7 Time	The system can validate time data type (e.g. hh:mm:ss).	X					
2.4.8 Fixed-length	The system can validate fixed length values (e.g. enter data which exceeds the field length, update, retrieve and display).	X					
2.4.9 Minimum/maximum value	The system can validate minimum/maximum values (e.g. minimum value is 1 and/or maximum value is 10).	X					

2.4.10 Pattern matching	Values can be matched against a pre-defined pattern (e.g. Canadian postal codes, US zip codes).	X					
2.4.11 Input masks and smart data validation	The System supports input masks and/or smart data validation.	X					
2.5 Data Update	Refers to the manner in which the system keep data current.	-	-	-	-	-	-
2.5.1 Real-time updates	Updates are processed as soon as they are made.	X					
2.5.2 Batch updates	Updates can be grouped and processed in a designated sequence (e.g. several changes made to different records and processed in a batch).	X					
2.5.3 Global updates	Updates can be processed against all records (e.g. one change made to all records).	X					
2.5.4 Validation batch updates	Validation can be applied to batch updates.	X					
2.5.5 Validation global updates	Validation can be applied to global updates.	X					

2.6 Indexing of Fields	Refers to the processing of data indexing tasks performed by the system.	-	-	-	-	-	-
2.6.1 Multiple fields to one index	One index can be used to search on many fields (e.g. the index name could be location and under the index named location would be all the location fields like room, cabinet, drawer).	X					
2.6.2 Concatenation of fields and character string	A field and a character string can be concatenated to create a single entry in the index.	X					
2.6.3 Updates indices automatically	Indices are updated automatically and immediately whenever a change (addition, update, deletion) in an indexed field occurs.	X					
2.7 Vocabulary Control		-	-	-	-	-	-
2.7.1 Authority Control	For the purposes of this document, "authority" should be taken to mean a simple list of permissible terms (not arranged hierarchically) to be	-	-	-	-	-	-

	used during data entry and/or retrieval.						
2.7.1.1 Authority control with software	Authority control is available within the software.	X					
2.7.1.2 Update authority lists procedure	The system can provide a separate procedure to update an authority list.	X					
2.7.1.3 Develop authority lists	Authority lists can be developed within the software.	X					
2.7.1.4 Fields with authority control	The user can choose the fields for authority control.	X					
2.7.1.5 Integrate pre-built authority lists	External pre-built authority lists can be integrated into the software at any time.	X					
2.7.1.6 Authority lists for entry and validation	Authority lists can be used to assist in the entry and validation of data (e.g. user can select from the authority list during data entry).	X					
2.7.1.7 Authority lists included in the system	The supplier can provide a list of authority lists that are included in the system.	X					

2.7.1.8 Authority lists for search	Authority lists can be used to assist in the formulation of search criteria (e.g. user can select from the authority list to help select terms to enter as search criteria).	X					
2.7.1.9 Update authority lists in entry mode	The system can add terms to authority lists and update these lists without leaving the data entry mode.	X					
2.7.1.10 Authorization to alter authority lists	The system can control permissions to add, change, and delete terms in an authority list to ensure that a specific user is authorized to make changes.	X					
2.7.1.11 Print authority lists	All authority lists can be printed.	X					
2.7.1.12 Several authority lists used within one field	Several different authority lists can be used within a single field (e.g. Object Name field has separate term list for Textile department, Ethnology department).	X					
2.7.1.13 Deletion/change of terms - implications for records	The system can handle the change or deletion of an authority term if the term is currently used in the records.	X					

2.7.2 Thesaural Control	For the purposes of this document, "thesaurus" is taken to mean a list of terms showing hierarchical, synonymous, and other relationships.	-	-	-	-	-	-
2.7.2.1 Thesaural control with software	Thesaural control is available within the software.	X					
2.7.2.2 Update thesaurus files procedure	The system provides a procedure to update a thesaurus file.	X					
2.7.2.3 Developed thesauri	Thesauri can be developed within the software.	X					
2.7.2.4 Fields with thesaural control	The user can choose the fields for thesaural control.	X					
2.7.2.5 Integrate pre-built thesaural files	External pre-built thesauri (e.g. Thesaurus of Geographic Names, Art & Architecture Thesaurus, or a locally-built thesaurus that is already in use by the museum) can be imported and integrated with the system.	X					

2.7.2.6 Thesauri for entry and validation	Thesauri can be used to assist in the entry and validation of data (e.g user can browse and select from the thesaurus during data entry).	X					
2.7.2.7 List pre-built thesauri files	The supplier can list the pre-built thesauri files that are included in the system.	X					
2.7.2.8 Thesauri for search	Thesauri can be used to assist in the formulation of search criteria (e.g. user can browse and select from the thesaurus to help select terms to enter as search criteria).	X					
2.7.2.9 Thesauri for term expansion during retrieval	Thesauri are used during the retrieval process to expand a users' search to include synonyms and narrower terms (e.g. if a user searches for "Painting", the system invokes the thesaurus to include narrower terms like "Watercolour").	X					
2.7.2.10 Update thesaurus files in entry mode	Terms can be added or updated for the thesaurus files without leaving the data entry mode.	X					

2.7.2.11 Authorization to alter thesaurus	The system can provide a control over who can add, change, and delete terms in a thesaurus file.	X					
2.7.2.12 Homonyms within thesaurus	The system can handle homonyms within the thesaurus and prompt users towards options (e.g. "drum" as a percussion instrument or as a container).	X					
2.7.2.13 Thesaurus viewed hierarchically	The terms in the thesaurus can be viewed and browsed hierarchically.	X					
2.7.2.14 Unauthorized term	The system can create and use an unauthorized term which can then be marked for review at a later date.	X					
2.7.2.15 Print thesauri files	All thesaurus files can be printed.	X					
2.7.2.16 Display all thesaurus information	The system can display all information associated with a thesaurus term (e.g. relationships, definition, scope notes, etc.).	X					
2.7.2.17 Several thesauri used within one field	More than one thesaurus can to be used with a single field (e.g. Object Name field has separate thesauri for Textile	X					

	department, Ethnology department, etc.).						
2.7.2.18 Monolingual and multilingual thesaurus, ISO standard	The system can support ISO 25964-1:2011 - Information and documentation -- Thesauri and interoperability with other vocabularies -- Part 1: Thesauri for information retrieval.	X					
2.7.2.19 Development of multilingual thesauri	Multilingual thesauri can be developed within the software.	X					
2.7.2.20 Development of monolingual thesauri	Monolingual thesauri can be developed within the software.	X					
2.7.2.21 Change of terms - implications for records	The system can handle the change of a thesaurus term if the term is currently used in the records.	X					
2.7.2.22 Change of terms - implications for narrower terms	The system can handle the change of a thesaurus term which has narrower terms linked to it.	X					
2.7.2.23 Deletion of terms - implications for records	The system can handle the deletion of a thesaurus term if the term is currently used in the records.	X					

2.7.2.24 Prevent deletion of terms which have narrower terms	The system will prevent the user from deleting a thesaurus term which has narrower terms linked to it.	X					
3 User Interface	-	-	-	-	-	-	-
3.1 Help Features		-	-	-	-	-	-
3.1.1 Default data entry/update screen(s)	The system can provide default data entry and update screen(s).	X					
3.1.2 Tutorial available	The system has an integrated tutorial.		X				
3.1.3 On-line help	The system can provide on-line Help.	X					
3.1.4 Help on request	The system only offers Help when requested.		X				
3.1.5 Context-sensitive help	When the help function is invoked, the information displayed always relates to the process being executed (e.g.	X					

	while in query invoke help).						
3.1.6 Help at the field level	Help is available to describe the proper content of a field during data entry or retrieval.	X					
3.1.7 Self-explanatory help	The on-line help is self-explanatory (must not consist only of codes that requires the operator to consult a manual).	X					
3.1.8 User-defined help	The system allows users to add to or change the current help information.		X				
3.1.9 User-built help file	The system allows users to build their own help files (e.g. adding help for a field which currently does not have help).		X				
3.2 Data Entry		-	-	-	-	-	-
3.2.1 Repeatable field	The system allows a field entry to be flagged as being repeatable for subsequent entries until the flag is removed.	X					

3.2.2 Repeatable multiple entries	The system allows multiple entries to be flagged as being repeatable for subsequent entries until the flag is removed.	X					
3.2.3 Record duplication	The system allows data duplication to be performed automatically at the record level.	X					
3.2.4 Default Values	The system allows any data field to be assigned a start-up default value that will be automatically entered for new entries (e.g. department name).	X					
3.2.5 Mandatory fields	The system allows any number of fields to be flagged as mandatory.	X					
3.2.6 Override mandatory fields	The system allows mandatory fields to be temporarily overridden.	X					
3.2.7 Calculated fields	The system allows field entries to be calculated from other field entries or constants (e.g. taxes are set at a fixed rate and calculated automatically).		X				

3.2.8 Cut and paste	The system allows cut and paste operations (e.g. cut a field and paste it to another field within the same document).	X					
3.2.9 Fields copying	The system allows copying of fields selectively from one record to another (e.g. copy two fields from an existing document into a new document).	X					
3.2.10 Data formatting	The system can support text format standards (italic, bold, underline, etc.).	X					
3.2.11 Macros	The system can record information inside macros to speed data entry (e.g. create a new document, update, retrieve and display).		X				
3.2.12 Hot-key	The macros can be executed for data entry purposes by pressing special key combinations (e.g. Ctrl + R will execute a macro to print the document that has been entered).		X				
3.2.13 Search and replace within record	The system can offer a search and replace function within a single record during the data entry process (e.g. identify a source name, search for the	X					

	name within one record only, and replace with new text).						
3.2.14 Search and replace between records	The system can offer a search and replace function between records during the data entry process (e.g. identify a source name, search for the name across the database, and replace with new text).	X					
3.2.15 Import data from other sources for part/entire records	The system can draw data from required formats, such as Microsoft Office, open source files, xml, csv.	X					
3.2.16 Field level controls	The system allows the institution to set controls over mandatory/optional settings for each field to set the default value of a field and to apply input masks.	X					
3.2.17 Date pickers	The system includes a date-picker.	X					
3.2.18 Spell checker	There is an on-line spell checker.	X					

3.2.19 Language of spell checker	Users can choose the language of the spell checker.	X					
3.2.20 Add terms to spell checker	Users can add terms to the spell checker.	X					
3.3 Date Formats		-	-	-	-	-	-
3.3.1 Date format	<p>Date formats required by the institution are supported.</p> <p>-Month Day Year ex. May 5 1965; circa 1965; 1960s; after 1948; before 1948</p> <p>-Date ranges ex. May 5 1965 to May 14 1965, circa 1965-1966, 1960s-1970s</p> <p>(Also need to be available in French)</p>	X					
3.3.2 Date entry	The system supports date pickers and pop-up calendars.	X					
3.3.3 Date searching	The system can specify the date format for searching.	X					
3.3.4 Date display	The system can specify the date format for display.	X					

3.3.5 Date output	The system can specify the date format for output (e.g. reports).	X					
3.3.6 Attribution dates	The system supports approximate dates (e.g. prior to, later than, circa, ?, BC, AD).	X					
3.3.7 Date conversion	The system can convert dates to a standard format (e.g. when entering dates different formats (050596, 05 MA 96, 05 May 1996, 19960505, 960505) can be entered and the system will convert to a standard format).	X					
3.3.8 Unknown dates	The system allows unknown dates to be entered as such (e.g. unknown).	X					
3.4 User Customization		-	-	-	-	-	-
3.4.1 Data entry screen(s)	The system allows users to customize the layout of data entry screens.	X					
3.4.2 Data retrieval screen(s)	The system allows users to customize data retrieval screens (e.g. on the data retrieval screen change a field label,	X					

	retrieve and display a document).						
3.4.3 Field tags (labels)	The system allows users to customize field tags (labels) on the data entry screen (e.g. while in the data entry screen change a field label, display document).	X					
3.4.4 Error messages	The system allows users to customize error messages (e.g. generate an error message, change the wording in the error message, invoke new error message).	X					
3.5 Bilingual (English/French)		-	-	-	-	-	-
3.5.1 Alternate language	The system can function in an alternate language.	X					
3.5.2 Language selection at login time	The system allows an alternate language to be selected at login time.	X					
3.5.3 Language selection on any screen	The system allows an alternate language to be selected from any screen.	X					

3.5.4 English or French information	The system allows all information to be displayed in either language (e.g. English or French).	X					
3.5.5 English and French information	The system allows all information to be displayed in both languages (e.g. English and French).	X					
3.6 Other Languages		-	-	-	-	-	-
3.6.1 UTF-8	The Unicode UTF-8 character-set standard is supported.	X					
3.7 Web Interface		-	-	-	-	-	-
3.7.1 Access via Internet	The system can provide access through a web browser.	X					
3.7.2 Consistent between platforms	The system can provide full functionality through a web browser.	X					
3.8 Accessibility	The system supports tools for ensuring the user interface and content is accessible to people with disabilities.	X					

3.8.1 Alternative formats	The system supports alternate formats for accessibility.	X					
3.8.2 Input methods	The system offers a choice of input methods.	X					
3.8.3 Output methods	The system offers a choice of output methods.	X					
4 Query	-	-	-	-	-	-	-
4.1 General Requirements		-	-	-	-	-	-
4.1.1 Query using native language	A query can be executed using the query native language.	X					
4.1.2 Formatted screens	The system can use formatted screens to execute a query.	X					
4.1.3 Query any field	A query can be run against any field.	X					
4.1.4 Boolean AND	The boolean operator AND is accepted.	X					

4.1.5 Boolean OR	The boolean operator OR is accepted.	X					
4.1.6 Boolean NOT	The boolean operator NOT is accepted.	X					
4.1.7 Nesting expressions	The system can enter nested searching expressions in the command line or search box (e.g. First Name=TOM AND ((Surname=SMITH) OR (Surname=BROWN)) to a level required by the institution.	X					
4.2 Range Searches		-	-	-	-	-	-
4.2.1 Search operators	Range searches using the =,<,> operators are accepted (e.g. find artists whose birth dates are greater than or equal to 1950).	X					
4.2.2 Range searches on numeric fields	Range searches on numeric values are accepted (e.g. find all objects in the database that have a value between \$5,000 and \$10,000).	X					

4.2.3 Range searches on date fields	Range searches on date fields are accepted (e.g. find all objects that were accessioned between May 12, 1999 and June 14, 2000).	X					
4.2.4 Using attribution dates	Date arithmetic can be performed on date fields with attributions (e.g. there is data that is c1945. Find everything from 1920-1944 will be including a search of 'c1945').	X					
4.2.5 Range searches on character fields	Range searches on alphanumeric fields are accepted.	X					
4.3 Wildcard Searching		-	-	-	-	-	-
4.3.1 Right truncation wildcard	The use of wildcards at the end of a stem is always accepted (e.g. book*).	X					
4.3.2 Left truncation wildcard	The use of wildcards at the beginning of a stem is always accepted (e.g. *book).	X					
4.3.3 Wildcard on any field	The use of wildcards on any field is accepted.	X					

4.3.4 Character substitution	The use of wildcards for any character substitution is accepted (e.g. "sm*th" finds both "smith" and "smyth").	X					
4.4 Query Results		-	-	-	-	-	-
4.4.1 Save results	The system allows the results from a query be saved for future use. (Not saving the query, but saving the results from the query).	X					
4.4.2 View results in alternative format	The results of the query can be displayed and formatted in the data entry screen.	X					
4.4.3 Default format	The system has a default record display order.	X					
4.4.4 Object display order	The system has a default field display order.	X					
4.4.5 Define default field display order	The system allows the default field display order to be changed.	X					
4.4.6 Field display	The system can select the fields to be displayed.	X					

4.4.7 Forward, backward browsing	The system can browse forward and backward through individual records and/or groups of records.	X					
4.4.8 Carry forward	When viewing a record that has many screens, the system can carry forward basic information which identifies the record (e.g. unique key, accession/catalogue number, object lot).	X					
4.4.9 Relative position	The system can indicate the relative position of the current screen within the record or set of records being displayed (e.g. Screen N of N or Record N of N).	X					
4.4.10 Access to related objects	The system can retrieve and display related objects based on their whole/part relationship (e.g. retrieve a record with a whole/part relationship, display all related information).	X					
4.4.11 Sort results	The results from a query can be sorted by various fields (e.g. perform a query, sort results on 3 different	X					

	fields and display the documents).						
4.4.12 Ascending	The results from a query can be sorted by various fields in ascending order (e.g. perform a query, sort the results in ascending order, and display the documents).	X					
4.4.13 Descending	The results from a query can be sorted by various fields in descending order (e.g. perform a query, sort the results in descending order, and display the documents).	X					
4.5 Features		-	-	-	-	-	-
4.5.1 Phonetic (sounds like) searching	Phonetic (sounds like) searching is available (e.g. hyda/haida).		X				
4.5.2 Using Natural language	Queries can be created using natural language phrases (e.g. would the system find the relevant records if a user typed in "find all the dolls that are		X				

	currently on exhibit"?)						
4.5.3 Adjacency or proximity searching	The system allows searches for words or expressions adjacent to or within a specific number of words of another word (e.g. find all occurrences of the word "stained" when it is within two words of "glass").		X				
4.5.4 Presence/absence searching	The system allows searches for the presence of a value or expression or for the absence of a value or expression (e.g. search for the presence of a value, then search for the absence of a value).		X				
4.5.5 Non-indexed fields	Searches can be performed on non-indexed fields.	X					
4.5.6 Multiple field searches	The system allows a search to be performed on multiple indexed and not-indexed fields.	X					
4.5.7 Query hit list	The system can browse through lists of previous queries.		X				

4.5.8 Number of hits	The system can inform the user of the number of hits (query results).	X					
4.5.9 Display of query results	Upon receiving the number of hits in a search, the system can give the option to proceed with the display.	X					
4.5.10 Search refinement	The system can refine search results with new search criteria (e.g. a search was done for Tom Thomson paintings; a new criterion is used to find the Emily Carr paintings in the same result set).	X					
4.5.11 Narrow the search scope	The system allows the scope of a result set to be narrowed (e.g., a search was done for works by Tom Thomson; a new criterion can be added to narrow the result to sketches only).	X					
4.5.12 Search history	The system can provide a facility for displaying previous search results.		X				
4.5.13 Review results in query mode	The system can view the results from a query without having to exit the query function.	X					

4.5.14 Modify query	Once a query has been executed, it can be modified for re-execution.	X					
4.5.15 Save query	A query can be saved for future use.	X					
4.5.16 Print query results	Query results can be printed.	X					
4.5.17 Simple (Google style) search	A simple Google-type search interface is available to the public.	X					
5 Reports	-	-	-	-	-	-	-
5.1 Pre-defined Reports	Reports that have been designed and created in a specific layout format and that are available within the software.	-	-	-	-	-	-
5.1.1 Pre-defined reports provided	The system comes with a series of pre-defined reports that can be generated in file formats required by the institution.	X					
5.1.2 List pre-defined reports	In the comment field, list the pre-defined reports available (e.g. accession/catalogue number, condition report, object, source).	X					

5.1.3 Change pre-defined reports	The system can change a pre-defined report.	X					
5.1.4 Save changed reports	The system can save a changed report as a new report for future use.	X					
5.1.5 Specify sort order	The system allows the user the flexibility to specify the sort order of a pre-defined report.	X					
5.1.6 Frequency report	The system can provide a frequency report for any field (e.g. Object Name - 10 dolls, 5 chairs).	X					
5.1.7 Concatenated fields	The system can provide a frequency list for any concatenation of fields (e.g. Object Name, Object Type (10 chairs; rocking, 11 chairs; arm)).	X					
5.1.8 Count of terms	The system can provide a frequency report on a count of unique terms (e.g. a query for Tom Thomson finds 300 works. Provide a frequency list for the object name field - 100 paintings, 200 sketches).	X					

5.1.9 Records processed	The system can provide a frequency report with totals (e.g. total number of records processed).	X					
5.1.10 Offline object worksheets	The user can work off-line on printed or electronic worksheets and use the system to synchronize changes for the database.		X				
5.1.11 User input	The system can provide a pre-defined report in columnar format with user input required (e.g. pre-defined report with six columns, user specifies the fields, headings, and the width of columns).	X					
5.1.12 Modify report format	The system allows users to temporarily change a pre-defined report.	X					
5.2 User Defined Reports		-	-	-	-	-	-
5.2.1 General Requirements	Ways in which users can choose and limit data for reporting.	-	-	-	-	-	-
5.2.1.1 User defined reports	The system allows users to define reports.	X					

5.2.1.2 Copy and modify reports	The system allows the user to copy an existing report, modify it and create a new report.	X					
5.2.1.3 Labels	The system can create labels using any fields defined by the user.	X					
5.2.1.4 Generate form(s)	The report generator can generate a form (e.g. legal form).		X				
5.2.1.5 Include/exclude fields	The report generator allows any field(s) to be included or excluded from a report.	X					
5.2.1.6 Full boolean search	The report generator allows the use of boolean searches.	X					
5.2.1.7 Sort on any field	The report generator sorts on any field.	X					
5.2.1.8 Ascending sort	The report generator sorts fields in ascending sequence.	X					
5.2.1.9 Descending sort	The report generator sorts fields in descending sequence.	X					

5.2.1.10 Calculates totals	The report generator calculates totals (e.g. total insurance value for the entire collection).		X				
5.2.1.11 Calculate sub-totals	The report generator calculates sub-totals (e.g. total insurance value for entire collection by department with sub-totals).		X				
5.2.1.12 Columnar reporting	The report generator produces columnar reports (e.g. select a group of records, sort by object number, print these fields in columns - object number, object, location).	X					
5.2.1.13 Redefine field names	The report generator allows for field names to be customized when printed (e.g. Object Name field name changed to Name of Object).	X					
5.2.1.14 Report browsing	The system allows users to browse reports.	X					
5.2.1.15 Indication of progress	When a report is run on-line, the system displays an indication of progress (e.g. scale or percentage completed).	X					

5.2.1.16 Report display on screen	The user can view the output from a report on the screen.	X					
5.2.1.17 Reports printed	The user can print the output from a report.	X					
5.2.1.18 Reports saved on disk	The system allows users to save reports on disk (e.g. save output form report, retrieve report from disk and display).	X					
5.2.1.19 Reuse saved output	The system allows the saved output from the report to be reused (e.g. retrieve the saved report from 5.2.1.19 and display in a Word Processing Package).		X				
5.2.2 Formatting Features	Ways in which users can define the look of reports.	-	-	-	-	-	-
5.2.2.1 Text formatting	The system supports text format standards including diacritics and different fonts.	X					
5.2.2.2 Document formatting	The system supports document formatting including headers and footers, margin control.	X					
5.2.2.3 Date produced	The report generator outputs the date that the report was generated.	X					

5.2.2.4 Date formats	The report generator outputs the date that the report was generated in various date formats selected by the user.		X				
5.3 Document Production	Ways in which users can define the outputs of system-created reports.	-	-	-	-	-	-
5.3.1 Templates	The system has the functionality to edit report and other templates by users. It is possible to change report templates without system customization.	X					
5.3.2 Web Reports	The system can create reports in accessible HTML.		X				
5.3.3 Emails	The system can generate emails based on user-defined triggers.		X				
5.4 Visual representation of data	Features that would allow users to see broad data categories through visual representations, rather than through lists.	-	-	-	-	-	-
5.4.1 Browsing taxonomies	The system can highlight or visually represent characteristics of taxonomies, such as taxonomy structures,	X					

	or usage and search statistics.						
5.4.2 Temporal data	Temporal data can be rendered through timelines or other forms of visualization.		X				
5.4.3 Geographic data	The system can render geographic data through maps, floor plans or other visualization formats.		X				

Section B: Extended Functionality Criteria

Criteria	Description	Mandatory	Nice to Have	Not Applicable		Yes	No	Comments
6 Enhanced Collections Management		-	-	-	-	-	-	-
6.1 Rights and Reproductions	The documentation and management of information about the reproduction of objects, including the preparation of images, casts, and models.	-	-	-		-	-	-
6.1.1 Rights and Reproductions Management	The system integrates a variety of rights management schemes (Canadian copyright, CC, other jurisdictions) into its workflow.	X						
6.1.2 Record copyright ownership	The system can document ownership of copyright of an object.	X						
6.1.3 Ownership of copyright of reproductions	The system can document the ownership of copyright of any reproduction.			X				
6.1.4 Document information about reproductions	The system can document information about reproductions of objects, including images, casts and models.			X				

6.1.5 Access to reproductions by unique local number	The system allows reproductions to be accessed via the unique local number (e.g. if any type of reproduction exists can it be documented and searched via the unique number (accession number, reproduction number, Borden number).	X					
6.1.6 Illegal Reproduction	The system can incorporate features to discourage the illegal reproduction of the digital image (watermarks).		X				
6.1.7 Copyright	The system can record the copyright information for both the master digital image video and its surrogates.	X					
6.1.8 Photos/images related to collections management processes	The system can link images to specific collections management events (e.g. photographs taken before and after a specific treatment to the conservation process).		X				
6.1.9 Print images	The system can print any image.	X					
6.1.10 Print image/text and copyright	Notification of copyright is provided upon printing of images/text.		X				
6.1.11 Sale of images	The system can deal with the sale of images (digital/printed) (e.g. Client name, address, order quantity and price).		X				
6.1.12 E-commerce	The system connects to a third party e-commerce service.			X			
6.1.13 Receipt	The system can produce a receipt for the sale of images.			X			
6.1.14 Link to Object record	The system can link the sale of image to the object record (e.g. does the object record now indicate that one reproduction of the object exists?).			X			
6.1.15 Physical characteristics	The system can document the physical characteristics of the image file (e.g. resolution, colour depth or compression).	X					
6.2 Public Access and Engagement	The system's capacity to support public viewing of and input into information accessed by the public.	-	-	-	-	-	-
6.2.1 Searching module	The system can provide a searching module for public access.	X					
6.2.2 Internet public access	The system can provide public access via Internet.	X					

6.2.3 Subset access	Public users can define subsets at a level controlled by the institution.		X				
6.2.4 Welcome display	The system allows the display of a user-defined introductory/welcome screen.		X				
6.2.5 Alternate language	The system allows the selection of an alternate language by the public.	X					
6.2.6 Restart	The system can provide a continuously displayed option to restart a session.	X					
6.2.7 Multiple databases	The system allows the public to select the database of choice (e.g. If an institution has many departments, can the public select only one or two?).			X			
6.2.8 View selected fields	The system allows viewing only selected fields.	X					
6.2.9 Search refinement	The system allows the public to refine searches, both by including other search criteria and amending existing ones.	X					
6.2.10 Save searches	The public can create accounts to save searches and results.		X				
6.2.11 Collect information from public	The system can collect information from the public. Name + valid email.	X					
6.2.12 Print results	The system allows the public to print the results from searches.		X				
6.2.13 Print control	The system allows the institution to control the format, content and the number of records to print.	X					
6.2.14 Print pricing	The system allows a charge to be applied to printed outputs.			X			
6.2.15 Printing of images	The system allows images to be printed by the public over the web.			X			
6.2.16 Visitor statistics	The system can run statistics on visitors, hits, etc.	X					
6.3 Customization	Customization of workflows, data entry fields, reports, controlled vocabularies, event types, and access control levels.	-	-	-	-	-	-
6.3.1 Customization by the supplier	The software can be customized by the supplier.	X					
6.3.2 Customization by the user	The software can be customized by the user.		X				

Section C: Technical Criteria

Criteria	Description	Mandatory	Nice to Have	Not Applicable		Yes	No	Comments
7 Technical Requirements		-	-	-	-	-	-	-
7.1 Import/Export Functions		-	-	-		-	-	-
7.1.1 Import Files		-	-	-		-	-	-
7.1.1.1 List of file types	The supplier has provided a list of all file types that can be imported into the system without customization.	X						
7.1.1.2 Field selection available	The system can import ASCII files and load the information into specific fields (e.g. create a word processing file containing information for Accession Number and Object Name; import to specific fields).	X						
7.1.1.3 Summary report	The system can generate a summary report for the import function listing such things as number of records read, rejected, accepted, etc.	X						
7.1.1.4 Field validation	The system can perform field validation when importing data.	X						
7.1.1.5 Duplicate checking	When importing records, the system can check for duplicate records.	X						
7.1.1.6 Duplicate checking defined by Database Administrator	When importing records, the system can check for duplicate records based on a key defined by the database administrator.		X					
7.1.1.7 Bypass field validation	The system can permit bypassing of field validation during imports and generate appropriate error reports.	X						
7.1.1.8 Hold for verification	For records that have failed data validation during import, the system can produce an error report or hold these records for user verification (e.g. import data with an invalid term to an authority-controlled field).	X						
7.1.1.9 Long fields	The system can provide a report if data has been rejected or truncated on import.	X						
7.1.1.10 Import XML	The system can import in XML.	X						
7.1.1.11 List XML import standards	In the comments field, list the XML import standards supported (e.g. Dublin Core or SPECTRUM).	X						

7.1.1.12 Specify import formats	CHIN Microtext, delimited ASCII, MARC, or SGML.	X					
7.1.2 Export Files		-	-	-	-	-	-
7.1.2.1 Fixed length records	The system can export ASCII files having fixed length records.	X					
7.1.2.2 Variable length records	The system can export ASCII files having variable length records.	X					
7.1.2.3 Field selection available	The export function allows the selection of fields to be exported (e.g. export the Accession Number and Object Name data from records imported).	X					
7.1.2.4 Summary report	The system can generate a summary report for the export function listing such things as number of records read, number of records exported, etc.	X					
7.1.2.5 Flag data records	The system can flag the record(s) that have been exported.	X					
7.1.2.6 Flag data fields	The system can flag the fields that have been exported.	X					
7.1.2.7 Dynamic Data Exchange	The system supports DDE (Dynamic Data Exchange) or equivalent (e.g. link to a range of cells in a spreadsheet).			X			
7.1.2.8 Object linking & embedding	The system supports object linking and embedding or equivalent (e.g. link to (or embed) a Word document within a text field).		X				
7.1.2.9 Specify export formats	In the comments field, list other export formats that are supported by the system (e.g. CHIN Microtext format, delimited ASCII, MARC)	X					
7.1.2.10 Export XML	The system can export in XML in a standard (Dublin Core or SPECTRUM) or customizable format.	X					
7.1.3 Interface with Other Software		-	-	-	-	-	-
7.1.3.1 Word processor	The system allows data to be imported from and exported to word processing software.	X					
7.1.3.2 Spreadsheet	The system allows data to be imported from and exported to spreadsheet software.	X					
7.1.3.3 Import/Export to other software	In the comment field, list other software package types that interface (import/export) with the software.	X					

7.1.3.4 ODBC Compliant	The system allows queries to be performed from outside the institution using ODBC (Open Database Connectivity).			X			
7.1.3.5 Interoperability	The system can exchange data with other systems based on interoperability standards (OAI, Dublin Core).	X					
7.2 Documentation & Support		-	-	-	-	-	-
7.2.1 User documentation	The supplier can describe options for user documentation, release notes and updating documentation.	X					
7.2.2 Number of copies	The supplier can provide how many copies of documentation are included in the purchase price.	X					
7.2.3 On-line documentation	All documentation is available on-line.	X					
7.2.4 Documentation for new users	A 'quick start' version of the full documentation is available to support new users.	X					
7.2.5 System documentation	The supplier can fully describe the components of the system, including base software.	X					
7.2.6 Help desk support	The supplier can fully describe help desk options, costs and availability.	X					
7.2.7 Data dictionary formats	The data dictionary is available electronically or online, and it is included as part of the documentation package.	X					
7.2.8 Customized modules	The system can be customized to add functions specific to disciplines (e.g. separate module for oral history).		X				
7.2.9 Source code provided	Does the vendor provide access to the source code?			X			
7.2.10 Protection	The supplier agrees to have a machine-readable copy of the full source code for all the purchased software, plus necessary supporting documentation, delivered to an agreed third party at the time of installation and with each new release.			X			
7.2.11 Institution's rights if the supplier withdraws from business	The supplier can confirm and provide proof that the institution will have the right to maintain and develop the collections management system itself if the supplier withdraws from business or from supplying the system.	X					
7.3 Training		-	-	-	-	-	-

7.3.1 Training included with software	The supplier can describe and provide costs related to all training options, including specialized and customized training (e.g. security and control, backups, and system administration).	X					
7.3.2 Third-party training	Third-party suppliers are in place to provide training.		X				
7.3.3 On-site training	The training will be provided at the client site.	X					
7.3.4 Train-the-trainer option	The supplier can provide or support a train-the-trainer program.		X				
7.4 Features	Data fields and tasks related to specialized collections, topics or disciplines relevant to collections.	-	-	-	-	-	-
7.4.1 Discipline	The system has built-in modules or functions specific to discipline (e.g. separate module for ethnology, history or fine arts).		X				
7.4.2 Specify modules	The supplier can provide a list of the disciplinary modules handled by the system.	X					
7.5 Special Features	Data fields and tasks related to special forms or types of information relevant to collections	-	-	-	-	-	-
7.5.1 Customized sort table	The system allows sort tables to be customized to change the order (collating sequence) of the results (e.g. sort accession numbers in a logical order).	X					
7.5.2 Saving sort table	The system allows a modified sort table to be saved for further use.	X					
7.5.3 Multi-tasking	The system lets the user interrupt what they are doing to perform other tasks.		X				
7.5.4 Reminder function	The system can interrupt a user to do other tasks.			X			
7.5.5 Measurement conversion	The system can automatically convert and display imperial and metric measurements.	X					

7.5.6 Converts measurements on reports	The system can automatically convert imperial and metric measurements for reports.	X					
7.5.7 Selection of measurements	The system allows users to select preferred measurement units for data entry, display, reports, etc.	X					
7.5.8 Overrides converted measurements	The system can change the values of the converted measurements (e.g. change converted measurements while in data entry mode).		X				
7.5.9 Support bar codes	The system supports bar code information.	X					
7.5.10 Bar code labels	The system can produce bar code labels.	X					
7.5.11 Bar code software	Bar code support software comes with the system.	X					
7.5.12 Support bar-code scanners	The system allows information scanned by a bar code scanner to be loaded into the collections management system at a later time.	X					
7.5.13 Supports OCR	The system supports Optical Character Recognition (OCR).		X				

Section D: System Administration Criteria

Criteria	Description	Mandatory	Nice to Have	Not Applicable	Yes	No	Comments
8 System Administration		-	-	-	-	-	-
8.1 Security	The way in which the system handles the identity of users and the control and tracking of permissions to change data.	-	-	-	-	-	-
8.1.1 Multi-level security	The system provides security for different levels of user (e.g. Administrator, Data Entry clerk, Curator, Public Access, Scholarly research).	X					
8.1.2 User ID security	The system requires user-id for access to the system.	X					
8.1.3 Password security	The system requires all users to enter a password for access to the system.	X					
8.1.4 Password administration	The system has procedures for initiating and changing passwords.	X					

8.1.5 User function security	The system allows system administration to define security at the function level (e.g. allow a user to access data entry functions only).	X					
8.1.6 File security	The system allows system administration to control access, for different levels of user, to one or more specific files.	X					
8.1.7 Field(s) security	The system provides controls to limit access to one or more specific fields within the system (e.g. amending location information).	X					
8.1.8 Record(s) security	The system provides controls to limit access to a specific record or group of records within the system.	X					
8.1.9 Security by discipline	The system provides controls to limit access to one or more specific disciplines within the system.	X					
8.1.10 Record amendment security	When a record is being amended by a user, that record is protected from being changed or deleted by other users.	X					
8.1.11 Record locked & available	When a record is being amended by a user, that record is available to other users in read-only mode.	X					
8.1.12 Record locked & not available	When a record is being amended by a user, that record is unavailable to other users.	X					
8.2 Index(s)	The administration of indexing activities.	-	-	-	-	-	-
8.2.1 Change of index	System administration can change the index of any field.	X					
8.2.2 Restructuring of affected indexes	System can be used while indexes are being rebuilt.	X					
8.3 Backup	The system's role in creating and storing back-ups of data, interfaces, configurations, metadata, data structures, reports etc.	-	-	-	-	-	-
8.3.1 Backup and recovery process	The software has a built in backup and recovery process.	X					
8.3.2 Back-end database back-up and recovery	The standard functionality of the back-end database will completely back-up and recover the system. This includes data, settings, transactions, users, interface, etc...	X					
8.3.3 On-line backup	The system allows online backup in a multi-user environment.	X					
8.3.4 On-line recovery	The system allows on-line recovery in a multi-user environment.		X				

8.3.5 Backup process	The system has a built-in backup process or can use the standard functionality of the back-end database for backups.	X					
8.3.6 Recovery process	The system has a built-in recovery process or can use the standard functionality of the back-end database for recovery.	X					
8.3.7 Backup time	The supplier can offer estimates on the time to execute the backup procedure. Briefly describe the estimated time to execute the backup procedure.	X					
8.3.8 Recovery time	The supplier can offer estimates on the time to execute the recovery procedure. Briefly describe the estimated time to execute the recovery procedure.	X					
8.3.9 Automate backups	The backup process can be automated. Briefly describe how the backup process is automated.	X					
8.3.10 Automate recovery	The recovery process can be automated. Briefly describe how the recovery process is automated.	X					
8.4 Audit Reports	Options for reporting on the system itself, rather than the data in the system.	-	-	-	-	-	-
8.4.1 Audit report on data	The system provides a report of all newly created/amended/deleted records (e.g. display the report of all newly created/amended/deleted records).	X					
8.4.2 Deleted records	For deleted records, the audit report contains all contents.	X					
8.4.3 Audit report on changes	The system provides a report of all changes in a record.	X					
8.4.4 User access profiles	The system provides a report of all user access profiles.	X					
8.4.5 Audit report on user activity	The system provides a report by user id of login/logout time on the system over a specific period (e.g. list login/logout times for each user).	X					
8.4.6 Audit report on module activity	The system provides a report of functional usage by user ID of system activity over a specific period (e.g. list the number of times each type of system activity (report, query, accession) was accessed on a certain day by a user.		X				
8.4.7 Audit module usage	The system provides a report by system activity on user access over a specific period (e.g. for each system activity (report, query, accession, etc.) list each user who accessed on a particular day).		X				
8.4.8 Query report	The system provides a report of the queries performed by users.		X				

8.4.9 Further supplier demonstration	The supplier will be given the opportunity to demonstrate features that are not included here related to system limits (e.g. database size, number of records, number of fields, and number of users).	X					
8.4.10 System limits	The system can support the number of objects managed now and anticipated to be managed in # years.	X					
8.4.11 Technical limitations	The system has technical limits. Document the technical limitations of the system (e.g. maximum number of users, concurrent users, and query length).	X					

7. Appendix B

Canadian Museum of Immigration at Pier 21, data samples.

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high school in 1958, Eva got a job as a secretary in a provincial government office
of the Dodecanese islands. She met Konstantinos (Kosta) Sakellis while he was
visiting his parents in Greece. Kosta had immigrated to Canada five years earlier
and settled in London, Ontario. After a two week courtship in Greece they married
and returned together to his home in London. Eva and Kosta departed from the Port
of Piraeus, Athens on board TSS <em>Olympia</em> on October 9 1962. They arrived at
Pier 21 on October 17 1962. The couple had two sons and owned and operated a
restaurant together for 27 years.]]></provenance>
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Evangelina (Eva) Sakellis est née en 1940 dans la ville grecque de Rhodes. En 1958,
après avoir terminé l'école secondaire, Eva a travaillé comme secrétaire dans un
bureau du gouvernement provincial des Sporades du Sud. Elle a rencontré
Konstantinos (Kosta) Sakellis lorsqu'il était en Grèce pour rendre visite à ses
parents. Kosta avait immigré au Canada cinq ans plus tôt et il s'était installé à
London, en Ontario. Après s'être fréquentés en Grèce pendant deux semaines, ils se
sont mariés et sont tous les deux revenus chez lui, à London. Eva et Kosta ont
quitté la Grèce le 9 octobre 1962 au port de Pirée, situé dans la ville d'Athènes.
Ils ont voyagé à bord du TSS <em>Olympia</em>. Ils sont arrivés au Quai 21 le 17
octobre 1962. Le couple a eu deux fils et ils ont été les propriétaires d'un
restaurant où ils ont tous les deux travaillé pendant 27 ans.
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You are free to:
<br /><br />
- <em>Share</em> - copy and redistribute the material in any medium or format
<br /><br />
The licensor cannot revoke these freedoms as long as you follow the license terms.
<br /><br />
Under the following terms:
<br /><br />
- <em>Attribution</em> - You must give appropriate credit, provide a link to the

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license, and indicate if changes were made. You may do so in any reasonable manner, but not in any way that suggests the licensor endorses you or your use.

Credit format: [Name], arrived from [Country], [Date of Arrival]. Canadian Museum of Immigration at Pier 21 [Object ID Number].

- *NonCommercial* - You may not use the material for commercial purposes.

- *NoDerivatives* - If you remix, transform, or build upon the material, you may not distribute the modified material.

- *No additional restrictions* - You may not apply legal terms or technological measures that legally restrict others from doing anything the license permits.

Notices:

You do not have to comply with the license for elements of the material in the public domain or where your use is permitted by an applicable exception or limitation.

No warranties are given. The license may not give you all of the permissions necessary for your intended use. For example, other rights such as publicity, privacy, or moral rights may limit how you use the material.]]</rights>

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Format du crédit: Titre, date. Musée canadien de l'immigration du Quai 21 (numéro d'accès).

- *Aucun dérivé* - Si vous modifiez, transformez ou adaptez le matériel, vous ne pouvez distribuer le matériel modifié.

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August 28, 2006

We (I) had arrived in Liverpool, December 17, 1949; we were supposed to have "set sail" (doesn't that sound so romantic?) for Canada that same evening. But because of a gale in the Atlantic our departure was re-scheduled until the next morning. The sea was reasonably calm until after we had rounded Northern Ireland. There we ran into the worst storm that I have ever experienced. We didn't move for more than 24 hours - or so we were told. We also learned that there are such monsters as 30-foot, 40-foot waves - and even bigger. The storm lasted three days, I believe. Most people were sea-sick and stayed in their cabins. I was not sick, and passed the time, together with a few other passengers of unknown nationalities, on the top deck, watching monster-waves hurtling themselves toward our small, insignificant 22,000-tonne ship, and threatening to bury us forever in a dark and watery grave.

The sea calmed. People gathered in the dining room, in the lounge, drinking, dancing, flirting, romancing - having fun. On Christmas Eve the Anglo-Saxon segment of our motley gang celebrated the birth of our savior by being roaring drunk. At the ship's chapel, Catholics celebrated mass at midnight. I went, because I had never been to a mass - never met a Catholic either. But, shame on me - I don't recall what wondrous things happened in that little chapel on Christmas morn.

The sea was quiet, calm - everything so peaceful. The ship's engines had been cut. The ship didn't plow or force itself along the low, spruce-covered hills which form the shoreline of Nova Scotia. Rather, it seemed as if it was gliding along on a smooth, almost metallic surface --- and there was Halifax. The trip across the Atlantic had taken nearly eight days instead of the usual five days. A pair of tug-boats met our (our?) ship and guided it into the harbour, past innumerable other ships, until we finally docked at --- PIER 21.

Down the gangway we scrambled, being herded into - as I recall - a rather big, somewhat austere hall. My name was called. Above his head, someone was brandishing an umbrella. I went for the umbrella. The umbrella-man, a representative from the C.P. Shipping Co., guided me through the throng of people to the Canadian Immigration Authorities where I was processed, my luggage opened, and my dirty underwear and smelly socks thoroughly inspected.

The door opened to the outside. We were in Canada: the land of Mounties in scarlet, of legendary furtraders, of derring-do explorers, fierce and noble Indians, yet more fierce animals; land of ice and snow, snow-shoes, big lakes, mighty rivers, endless forests; Yukon, gold, Dawson City, Jack London's stories, his wolf-hounds. And for many of those who came: the precious gift of freedom, freedom from persecution, from evil, from death.

It took awhile, but eventually I learned - in all sincerity, in all humility, and with great pride - to belt out: O Canada, we stand on guard for thee...I had become a Canadian.]]></storytext>

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<idno>17.05.18JA</idno>

<title>Oral History 17.05.18JA with Jaime Amaral</title>

<title_fr>Histoire oral 17.05.18JA avec Jaime Amaral</title_fr>

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<arrivaldate>October 1 1976</arrivaldate>

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<portofarrival>Montreal</portofarrival>

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<description>Jaime Manita Amaral was born in Luzu, Angola, in 1949, moving to Benguela as a child. Jaime joined the army from 1970 to 1973, serving during the Angolan War of Independence. Afterwards, he studied computer programming and met his wife Lurdes, marrying in 1975. Jaime became the leader of a dissenting workers' group, and was forced to flee after subsequent threats to his life. Jaime and Lurdes flew to Lisbon, Portugal, and came to Canada in 1976. They entered through Montreal and travelled to Sault Ste. Marie, where Jaime became a manager at a labour company and has been involved in the local Portuguese community.</description>

<description_fr><![CDATA[Jaime Manita Amaral est né en 1949 à Luzu, en Angola. Il a déménagé à Benguela lorsqu'il était encore un enfant. Jaime a fait partie de l'armée de 1970 à 1973 et il a servi pendant la guerre d'indépendance de l'Angola. Il a ensuite étudié la programmation informatique et il a rencontré son épouse. Il a épousé Lurdes en 1975. Jaime est devenu le chef d'un groupe de travailleurs dissidents et il a dû fuir après avoir été menacé de mort. Jaime et Lurdes ont pris l'avion jusqu'à Lisbonne, au Portugal, puis ils sont venus au Canada en 1976. Ils sont arrivés à Montréal, puis ils se sont rendus à Sault Ste. Marie où Jaime est devenu gérant dans une société de travailleurs, en plus de s'impliquer auprès de la communauté portugaise du coin.]]></description_fr>

<additional>Video oral history interview conducted by Emily Burton on 18 May 2017 in Sault Ste. Marie, Ontario. The interview is not restricted; please contact Museum staff for access to the full interview.</additional>

<additional_fr><![CDATA[Histoire orale vidéo menée par Emily Burton le 18 mai 2017 à Sault Ste. Marie, en Ontario. L'entrevue n'est pas à diffusion restreinte. S'il vous plaît communiquez avec le personnel du Musée pour avoir accès à l'entrevue complète.]]></additional_fr>

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<extent>00:42:39</extent>

<extent_fr>00:42:39</extent_fr>

<cliptranscript>And people can't understand how can they live under a tyrant like that and not rebel. Okay, now let's go back to me. Growing up, as we grew up, uh, because of the constraints of society and so forth, as parents they told me that you respect your elders, you don't swear, you don't talk politics, you don't criticize the government. So, that was ingrained on me, so if you came to me, told me that I wasn't free, I'd be upset. I was free, I could do whatever I want. I could go to the beach when I felt like, I could go play soccer or not play soccer, I could go to the party or not, or not go, so as far as I was concerned I was free. I never took it to that degree. So, and the government took advantage of that.</cliptranscript>

<cliptranscript_fr><![CDATA[Et les gens ne peuvent pas comprendre comment il est possible de vivre sous le joug d'un tyran sans se rebeller. Bon, revenons à moi. En grandissant, en grandissant, euh, à cause des contraintes sociales et tout ça, en tant que parents, ils m'ont dit qu'il fallait respecter ses aînés. Il ne faut pas sacrer, il ne faut pas parler de politique, il ne faut pas critiquer le gouvernement. C'est donc quelque chose qu'on m'a inculqué, alors si vous veniez me

voir pour me dire que je n'étais pas libre, ça me fâchait. J'étais libre, je pouvais faire tout ce que je voulais. Je pouvais aller à la plage quand je le voulais, je pouvais jouer au soccer ou non, je pouvais me joindre à une fête ou non, ou ne pas y aller, alors, en ce qui me concernait j'étais libre. Je ne l'ai jamais vu à ce niveau. Alors, et le gouvernement utilisait ça à son avantage.]]></cliptranscript_fr>

<clipcontext>Jaime describes how it was possible to feel free while living under a dictatorship.</clipcontext>

<clipcontext_fr><![CDATA[Jaime explique qu'il était possible de se sentir libre tout en vivant sous une dictature.

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