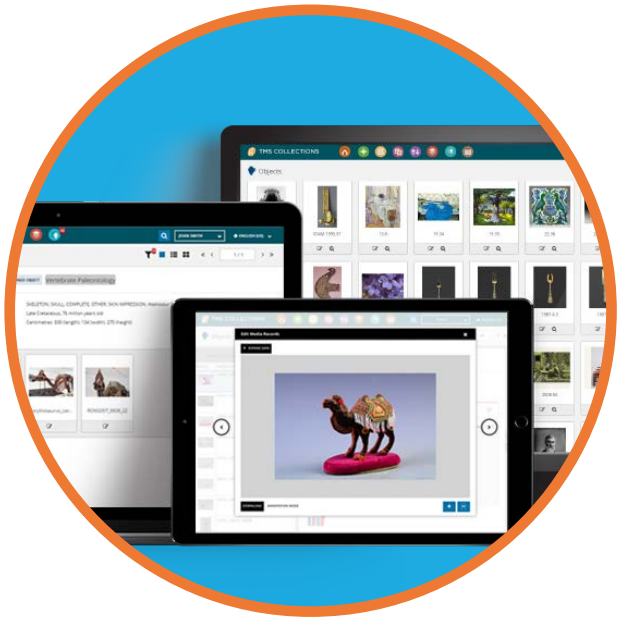
eGuide

TRANSITIONING TO TMS COLLECTIONS

A STEP-BY-STEP GUIDE FOR TMS USERS



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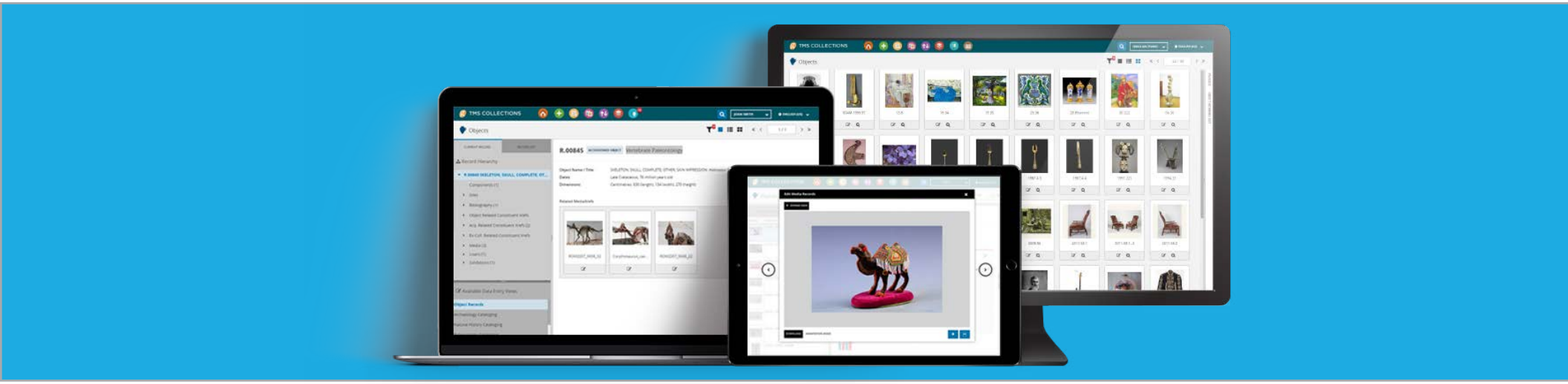

TRANSITIONING TO TMS COLLECTIONS

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Designed to handle all your collections management needs, TMS Collections is the next-generation, web-based version of TMS. The centerpiece of the TMS Suite of products, TMS Collections retains the functionality you rely on in TMS, while providing new features and benefits through its modern interface and technology stack.

Configure and assign role-based views for individual users, facilitate workflow with a powerful dashboard and new search options, and access your collection records from anywhere, using Chrome or Safari web browsers.

Offered as an upgrade to TMS clients, the TMS Collections software has a streamlined migration path from TMS. Gallery Systems' team is with you every step of the way, providing training, implementation, and configuration services.

Find everything you need to know about the transition process in this guide.

STEP ONE:

REVIEW IT PRE-REQUISITES

Time Required: Variable

To install TMS Collections, you must first confirm that your institution can meet the IT pre-requisites. These pre-requisites depend on your selected version of TMS Collections and whether you plan to host the software on premise or on Gallery Systems' secure servers.

Some pre-requisites to review include:

- Check the compatibility of your IT components with TMS Collections, e.g., Operating Systems and SQL Server
- Obtain the TMS Collections installation package from Gallery Systems
- Ensure you have a service account set up to run the TMS Collections service*
- Obtain an SSL (HTTPS) certificate and key, required to run TMS Collections securely

**You need a domain user account, with system administrator permissions on the machine where TMS Collections will be installed, and permissions to access your media files on network storage. This account needs to have permission to run services.*

NEED HELP?

SAFE REMOTE ACCESS TO YOUR DATA FROM ANYWHERE

Simplify your TMS Collections implementation by entrusting your IT services and hardware maintenance to Gallery Systems. Through our Managed Hosting services, we ensure your database remains secure on our servers, remotely accessible to authorized staff members, and updated to the latest software version, while saving you money by eliminating your need to purchase additional IT equipment. Log in with a web browser to safely view, modify, and export your TMS Collections data from anywhere.

If you have questions about your institution's IT pre-requisites, reach out to our Support team.

STEP TWO

TMS DATABASE UPGRADE

Time Required: Variable, as older databases require more time to upgrade

Before the migration to TMS Collections can begin, your institution must first back up its TMS database and upgrade to the latest version of TMS. If you have TMS Thesaurus Manager, included with TMS 2014 and later versions, you will also need to uninstall it as this web-based tool is part of the TMS Collections Installer.

NEED HELP?

UPGRADING TMS

For help upgrading TMS, reach out to Gallery Systems support anytime and we will gladly assist you. To perform your own upgrade, you can find all the necessary documentation and installation files in the Gallery Systems Community. If your institution doesn't have the IT resources or time to perform the upgrade, we can do it for you. Partnering with the Gallery Systems team is the fastest, most efficient way to ensure a smooth upgrade process.

STEP THREE

TMS COLLECTIONS TEST INSTALLATION

Time Required: 1 day

Prior to installing TMS Collections for live use, it is recommended to perform a test upgrade. Most institutions complete a test installation as it is useful for discovering how long upgrade tasks take, including the creation of media derivatives and indexing. An additional benefit is that it also allows your institution to conduct training in a non-production environment. Post-training, your organization can use this initial installation to experiment with configuration by drafting configuration specifications.

Once the test version is installed, create media file derivatives from your linked media files, for use with TMS Collections, and index the database. Both of these processes are managed using the TMS Collections Composer application, provided with TMS Collections.

During an installation, a standard set of Data Entry Views, ListViews, and DataViews is imported using the TMS Collections Composer. To customize the system for your institution and workflow, you will learn how to use and modify these views during the Configuration Training sessions.

It is then recommended to carry out performance testing to review the adequacy of your hardware, if you are hosting TMS Collections on your IT infrastructure.

When the test version of TMS Collections is ready, you can assign access to user accounts for your project team. You may want to temporarily update your team's security to System Administrator, so its members can receive a comprehensive view of TMS Collections and its functionality. When you install the final version, in Step Six, you can assign security based on organizational role, or however best suits your needs.

STEP FOUR

TMS COLLECTIONS APPLICATION TRAINING

Time Required: 2 days

You will learn how to operate a standard version of TMS Collections—without any custom configurations or changes—during this two-day training. The software's full functionality and navigation will be explored, allowing attendees to discover the new interface and the features that differ from TMS.

If your collections management software supports a large institution, you may want to limit training attendance to a smaller core project team, or "power users," who can later train your other users. However, for smaller organizations, everyone who will be using TMS Collections could be in attendance.

> Often, TMS Collections Application Training attendees are the same individuals who take part in Configuration Training.

STEP FIVE

TMS COLLECTIONS CONFIGURATION TRAINING

Time Required: 1.5 days

During this intensive training, you will discover the different ways of modifying TMS Collections to match your institutional workflows. Attendees will learn how to develop configurations and update their training database accordingly. These configurations are fully exportable and can be imported into your final TMS Collections database during installation.

Some suggested areas for producing related configuration specifications include:

- Security Settings
- Data Entry Views
- ListViews
- DataViews
- Querying
- Reports

NEED HELP?

OPTIMIZE YOUR TMS COLLECTIONS DATABASE

Tailor and enhance your TMS Collections database to your institution's specific needs and specifications with Gallery Systems' Configuration Services. Our experts provide a wide range of various configuration services, including personalized reports, data entry forms, screen views, and other standard adjustments to help you get started with TMS Collections quickly and efficiently.

> Making configurations to your TMS Collections database can occur anytime. During this training session, you do not need to pinpoint all the areas that require configuration.

STEP SIX

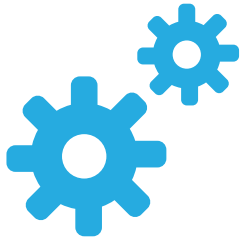
TMS COLLECTIONS INSTALLATION

Time Required: 1 day

Begin the process by scheduling when you will stop data entry, otherwise known as "freezing" your database. This action will ensure that your data stays consistent when you migrate from TMS to TMS Collections.

Next, uninstall the test version of TMS Collections and repeat Step Two and Step Three to upgrade your database and install your TMS Collections software. Make sure to import any desired configurations made in the training version, and then finish modifying TMS Collections to meet your current needs.

Once these steps are complete, your institution can begin using TMS Collections.



NEED HELP?

PROJECT MANAGEMENT

Gallery Systems provides optional project management services to institutions during the migration process. To facilitate a smooth transition from TMS to TMS Collections, our team oversees the planning for every step of the upgrade, installation, and training, such as handling the IT pre-requisites and creating scheduled task lists.

To better coordinate activities internally, we recommend that a Gallery Systems project manager partner with a project manager from your institution.

READY TO TAKE THE NEXT STEP?

Migrating to TMS Collections is an exciting step towards further enhancing and future-proofing your institution's collections management technologies.

To learn more about migrating from TMS to TMS Collections, visit our migration website and get in touch with Chris Alexander. As one of our dedicated Account Managers, Chris is happy to answer your questions and evaluate your institution's needs.