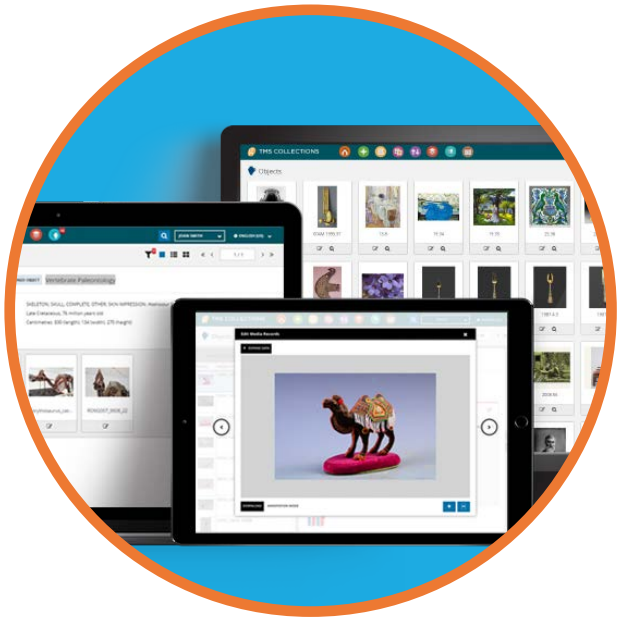
eGuide

TRANSITIONING TO TMS COLLECTIONS

A STEP-BY-STEP GUIDE FOR EMBARK USERS



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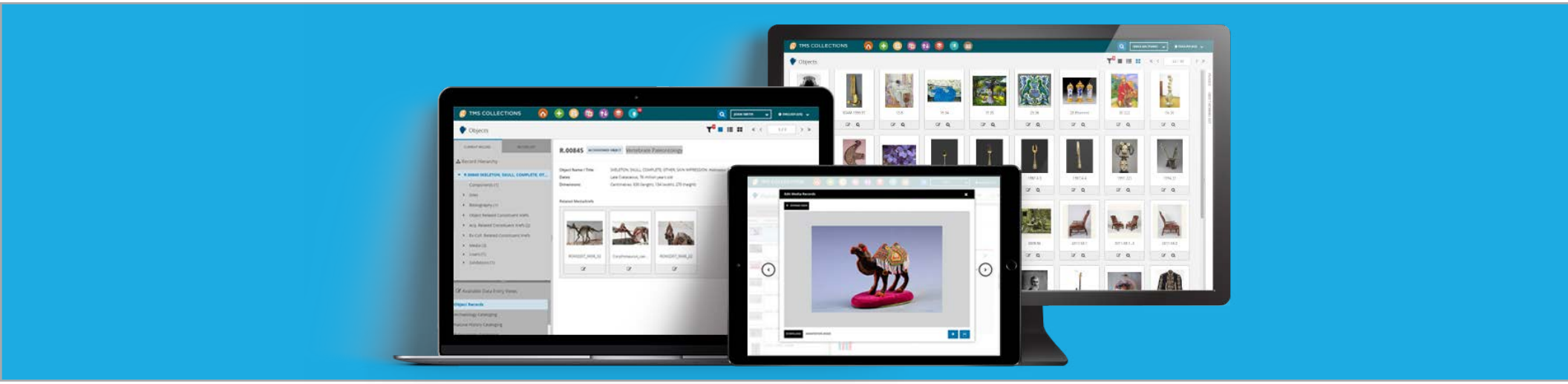

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Designed to handle all your collections management needs, TMS Collections is the next-generation of Gallery Systems software, providing enhanced functionality and ease-of-use to support multifaceted workflows.

The centerpiece of the TMS Suite of products, TMS Collections delivers versatile features and wide-reaching benefits through its modern interface and technology stack, while integrating seamlessly with software for conservation, online collections, and digital asset management.

Available as an upgrade to EmbARK clients, the TMS Collections software has a streamlined migration path from EmbARK. 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

To install TMS Collections, you must first confirm that your institution can meet the IT pre-requisites. These prerequisites depend on the 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
- 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 COLLECTIONS TEST INSTALLATION

Prior to installing TMS Collections for live use, it is recommended to perform a test installation. This trial database allows your institution to conduct training in a non-production environment. Post-training, your users can use this initial installation to experiment with configuration by drafting configuration specifications.

To begin the test installation, a backup of your EmbARK database will be created for import into SQL Server by the Gallery Systems team. Data exported from your database is brought into this trial TMS Collections database using standard data mapping, developed specifically for EmbARK clients. (This data conversion will be reviewed in **Step Three** to identify variety between databases.)

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

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 Four**, you can assign security based on organizational role, or whatever best suits your needs.

STEP THREE

CONVERSION REVIEW TRAINING

Between the test installation and the final migration, you are encouraged to become acquainted with your new TMS Collections database during a review training. This training allows you to fully audit the data mapping and data conversion that occurred in **Step Two**.

Through comparing these two databases, your core users will begin to familiarize themselves with TMS Collections, while identifying any areas of discrepancy in the data conversion—for instance, data appearing in an unintended field. Since every institution uses their EmbARK database differently, customizing the data mapping for the final TMS Collections installation is normal and should be expected.

NEED HELP?

ACHIEVE MORE WITH PROFESSIONAL SERVICES

To smooth your transition to TMS Collections, the Gallery Systems team provides a full array of services, tailored to meet your institution's needs. Receiving additional support is an effective, time-conscious option for enhancing your user abilities and the proficiency of your database. These services are available à la carte or bundled together with SupportPlus, a premium-level plan offering 40 hours of combined services.

Available services for TMS Collections clients include:

- Custom ListViews
- Custom Reports
- SSRS Configuration
- Specialized Training for Admins and Users

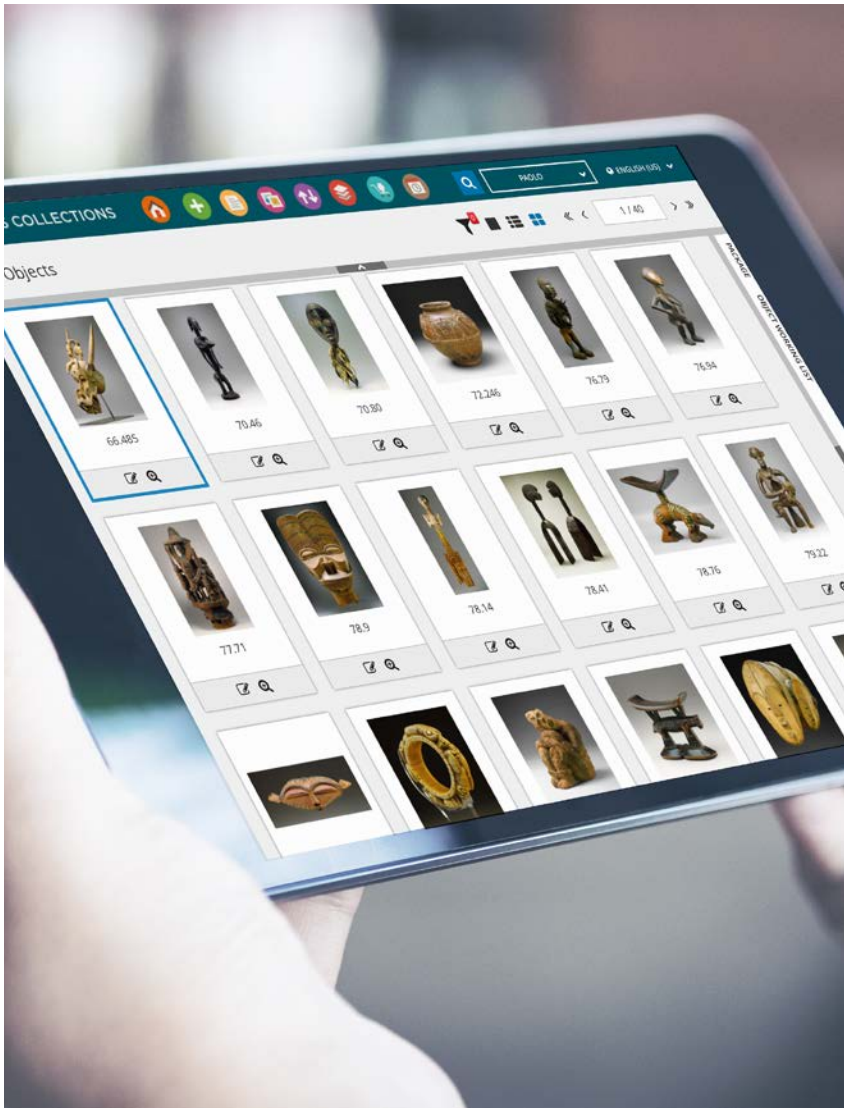
STEP FOUR

TMS COLLECTIONS INSTALLATION AND FINAL MIGRATION

Begin the final migration 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 EmbARK to TMS Collections.

Your institution's final TMS Collections database will be created using the feedback and analysis gained in Step Three, while resolving any discrepancies that were pinpointed. Once the database is approved by you, TMS Collections will be live for institution-wide use.

To facilitate the application and configuration training sessions, outlined in **Step Five** and **Six**, clients can request continued access to the test database described in **Step Two**. Through this test database, users can test configurations in a low-risk trial environment—an option that can be helpful, especially for larger institutions.



STEP FIVE

TMS COLLECTIONS APPLICATION TRAINING

You will learn how to use TMS Collections—before any custom configurations or changes—during this in-depth training, building upon **Step Two**'s conversion review training. The software's full functionality and navigation will be explored, allowing attendees to discover the new interface and the features that differ from EmbARK.

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 SIX

TMS COLLECTIONS CONFIGURATION TRAINING

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 in a test database environment, which are fully exportable and can be imported into your institution's TMS Collections database as desired.

Some suggested areas for producing related configuration specifications include:

- Security Settings
- Data Entry Views
- Querying
- Reports

NEED HELP?

OPTIMIZE YOUR TMS COLLECTIONS DATABASE

Tailor and enhance your TMS Collections database to your institution's unique 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.

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

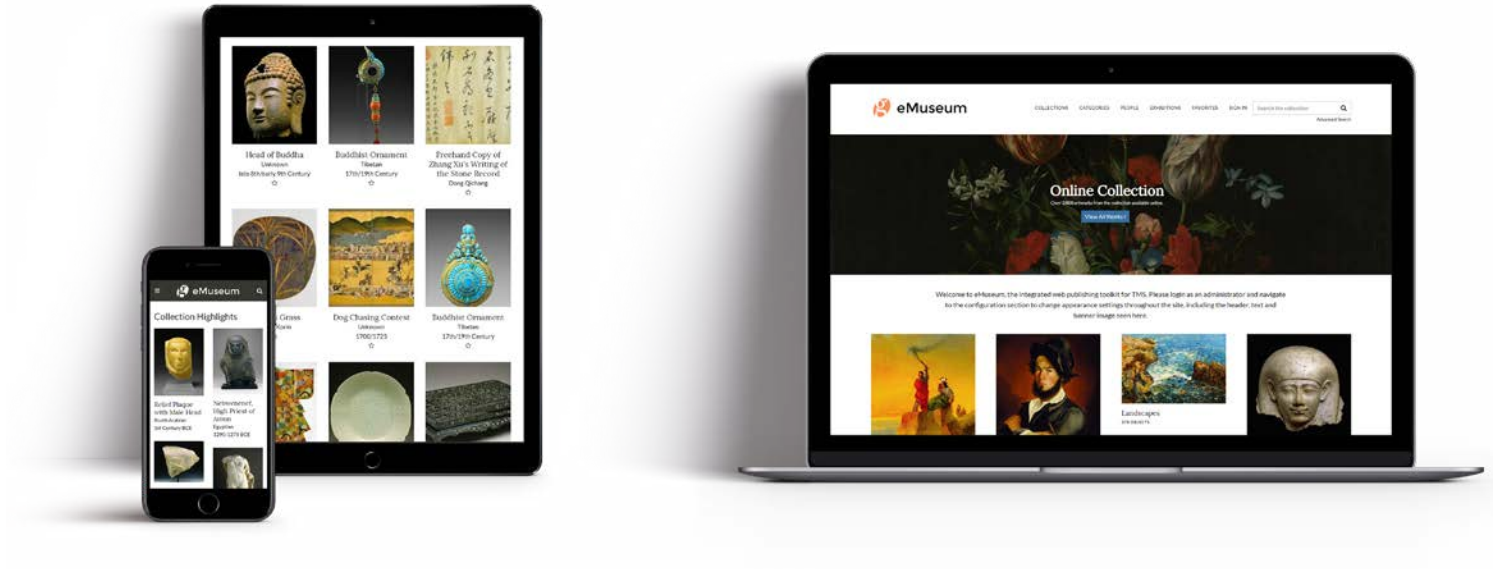
OPTIONAL

FROM WEB KIOSK TO EMUSEUM

If your institution showcases its collections online with Web Kiosk, you may wish to transition to eMuseum, the online collections solution for TMS Collections. Gallery Systems offers eMuseum as a software upgrade to Web Kiosk clients, covered under annual maintenance, since the latter software is not compatible with TMS Collections.

This transition typically takes about 5 days to complete, when a standard look and feel customization is purchased.

eMuseum integrates seamlessly with the TMS Suite of products, allowing you to efficiently publish your collections data to a public-facing website or intranet. Through fully configurable layouts, you can create digital exhibitions with trackable metrics and statistics that grant new insights into your web visitors.



EMBARK ROADMAP

Upgrading to TMS Collections is optional and should be done at the right time for your institution. Gallery Systems will continue to upgrade and support EmbARK and Web Kiosk into the future. We are committed to protecting your investment and providing the best products for your collection management needs.

Releases for EmbARK will continue to follow a 4 to 6-month cycle, providing enhancements maintaining compatibility with new versions of Windows and MacOS.

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 EmbARK 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.