Transitioning to TMS Collections: A Step-by-Step Guide

A Step-by-Step Guide for TMS Users

As a valued TMS for Windows user, you've relied on a trusted tool for managing your collection's data. Now, you're ready to take the next step toward a more flexible, scalable, and mobile solution that allows you to access your data from anywhere.

TMS Collections is a web-based platform designed to elevate your collections management experience. It combines all the core functionality you've come to depend on, with an array of new features that enhance both usability and efficiency. Expect a streamlined dashboard for quick access to your most frequently used data, customizable views tailored to your team's unique workflows, enhanced search capabilities, batch update functionalities, and a redesigned hierarchy to better manage exhibitions. The most exciting part? TMS Collections gives you the freedom to access your data anytime, anywhere, from any device with internet access.

In this guide, we'll walk you through the process of transitioning from TMS for Windows to TMS Collections—ensuring a smooth, efficient, and successful upgrade for your team.

Hassle-Free Hosting

Gallery Systems' Managed Hosting ensures your database is secure on our servers, regularly updated, and easily accessible. With this service, you can access your TMS Collections data remotely through any web browser, knowing that your hardware and software are expertly maintained and protected. Plus, by choosing this option, you save time and resources—no need for additional IT infrastructure or ongoing maintenance.

This document outlines the upgrade process for self-hosted clients, as all technical aspects will be handled for you if you choose Gallery Systems' Managed Hosting.

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Step One: Review IT Pre-Requisites

Before you can install TMS Collections, it's essential to ensure that your institution meets the necessary IT pre-requisites. These requirements will vary depending on if you're hosting the software on-site or using Gallery Systems' secure servers.

Here are some key prerequisites to review for institutions self-hosting:

- **Check system compatibility and server requirements**: Ensure your operating system and SQL server meet the **requirements for TMS Collections**.

- **Download the installation package**: Available on the **Community Site**, the TMS Collections installation package contains useful documentation.

- **Set up a service account**: A Windows service account is required to run TMS Collections—this account should have the necessary permissions (more details below).

- **SSL Certificate**: To ensure secure operation, you will need an SSL (HTTPS) certificate and key.

> **Important Note**: *The service account must be a domain user with system administrator rights on the machine where TMS Collections will be installed. It also needs permissions to access your network storage and media files, as well as the ability to run services.*

Step Two: Upgrade Your TMS Database

Before migrating to TMS Collections, your institution must back up its TMS for Windows database and ensure it is upgraded to the latest version of TMS. If your institution has multiple products within the TMS Suite, all tools need to be on the same version.

If you need assistance with the upgrade, Gallery Systems support is here to help—just reach out anytime. Alternatively, you can perform the upgrade yourself using the comprehensive documentation and installation files available in the **Gallery Systems Community**. If your institution lacks the IT resources or time to carry out the upgrade, our team can handle it for you. If your institution lacks the IT resources or time to carry out the upgrade, our team can handle it for you.

Step Three: Set Up a Test Environment for TMS Collections

While TMS Collections is designed to be intuitive and user-friendly, there may be a brief adjustment period when moving from TMS for Windows, especially for those familiar with the legacy system. To ensure a smooth transition, we highly recommend setting up a test instance of TMS Collections and performing a test upgrade before going live. This step will give you valuable hands-on experience with the upgrade process, allowing you to understand its timeline, identify any potential issues, and get a feel for the new system—without the pressure of being fully operational right away.

Important Note: *TMS for Windows and TMS Collections cannot run in parallel, so setting up a test instance is essential for preparing for the moment when users will no longer have access to TMS for Windows.*

The main advantage of a test instance is the ability to train current and future users in a non-production environment, where they can make mistakes and learn without risk to your live data. This also provides an opportunity to experiment with different data entry views, test existing reports, refine workflows, and collaborate with your teams to fine-tune processes across different areas.

After implementation, your test instance can serve as a sandbox for exploring new features and testing out ideas. Additionally, when new updates become available, you can upgrade the test system first, allowing you to explore new features and decide whether they should be incorporated into your production environment. Testing timelines and requirements can vary based on factors such as the specific needs, collection size, configuration, and any custom reports or workflows. Please note that a permanent test instance of TMS Collections is available for an additional fee.

If you're hosting TMS Collections on your own IT infrastructure, we also recommend conducting performance testing to evaluate whether your hardware meets the requirements for optimal system performance.

Step Four: TMS Collections Training

We offer a comprehensive training sessions that will guide you through the standard version of TMS Collections. During this training, you'll become familiar with the new features, learn how to navigate the platform, and discover where familiar functionalities from TMS for Windows are now located in the new system. Our training sessions are typically divided into application and configuration training to ensure the appropriate attendees are present for each session.

Who Should Attend the Training?
For smaller institutions, it's ideal for everyone who will be using TMS Collections to attend the training, ensuring all users are equipped with the knowledge they need from the start. For larger institutions, we recommend training a select group of "power users." These individuals will then be able to train their colleagues, tailoring the training to meet the specific needs and schedules of various teams. This approach ensures a more personalized and efficient training experience for everyone involved.

Configuring TMS Collections to Fit Your Needs

Configuration training sessions will equip you with the knowledge to modify TMS Collections to suit your institution's unique workflows. You'll learn how to set up the system to align with your needs, ideally using your own test instance to get a hands-on preview of how it will look with your institution's data. Many of these configurations can be exported and imported into your production environment once you're ready to upgrade to TMS Collections.

Key Takeaways:

- Configuring Security Settings

- Creating Data Entry Views

- Viewing Data and List Views

- Setting Up Data Views

- Querying Techniques

- Linking Reports

Optimize Your TMS Collections Database
Gallery Systems' Configuration Services offer a tailored approach to ensure that your TMS Collections database meets your institution's specific requirements. Our expert

team can assist with a wide range of custom configurations, from personalized reports and list views to data views and other adjustments, helping you get the most out of TMS Collections from the start.

During the training, you may identify additional configuration needs as you explore the system. If you're unsure of all the customizations you require upfront, don't worry. You can always reach out to Gallery Systems for further support, whether you're working with your test instance or after you've gone live with the production system.

Step Five: Final Steps to Go Live

The installation process begins by scheduling a time to stop data entry—also known as "freezing" your database. This step ensures that your data remains consistent during the migration from TMS for Windows to TMS Collections.

Next, uninstall the test version of TMS Collections, then revisit Step Two and Step Three to upgrade your database and install the TMS Collections software. Make sure to import any desired test configurations from the training instance and finalize any modifications to TMS Collections to suit your current needs. If you are using TMS Thesaurus Manager (included with TMS 2014 and later versions), it will need to be uninstalled, as this web-based tool is now part of the TMS Collections Installer. Be sure to allocate time for media processing during this stage.

Once these steps are completed, your institution will be ready to begin using TMS Collections.

Project Management

Gallery Systems provides project management services to guide your institution through the migration process. Our team takes care of the planning for each stage of the upgrade, installation, and training, including managing IT prerequisites and creating task lists to keep the project on track.

To ensure everything goes smoothly, we recommend designating a project manager from your institution. This individual should be familiar with your internal workflows and teams and will work alongside our project manager to facilitate a seamless transition. After go-live, we have additional resources available via the **Community Portal** and the **Help Documentation**, including our dedicated Client Care team, to support you throughout the process and beyond.

Ready to Take the Next Step?

Migrating to TMS Collections is an exciting opportunity to enhance the way your institution manages its data—moving towards a more flexible, scalable, and user-friendly solution that can grow with your needs.

Our team is here to support you at every stage of the transition, from initial planning to post-installation. To learn more about migrating from TMS for Windows to TMS Collections, **please reach out** to one of our dedicated Account Managers. They're here to answer your questions, assess your institution's specific requirements, and ensure your migration process is as smooth and successful as possible.

Ready to Take the Next Step?