

Every library's transition will look a little different. Use this as a practical starting point and take what's most relevant to your situation.

Early planning phase

- Identified all key decision points and who owns them
- Mapped out the stages of your transition from review through to go-live
- Confirmed which workflows, systems and supplier relationships are in scope
- Agreed an internal timeline that gives teams enough time to prepare without rushing

Confirm your ordering routes

- Decided between manual ordering and EDI or confirmed a hybrid approach where needed
- Identified which fund codes and order types need to be mapped to the new supplier
- Confirmed whether your current ordering route will continue or needs adjustment
- Checked that your acquisitions team is clear on the new process
- Agreed a process for handling orders placed during the transition window

Confirm your LMS integration

- Confirmed your LMS vendor is aware of the supplier change and any integration requirements
- Established whether existing integrations will transfer or need reconfiguring
- Tested or scheduled testing of order and invoice workflows in a test environment
- Confirmed how order records will be created
- Checked discovery layer updates
- Agreed who owns the integration setup on your side

Final checks before go-live

- Run end-to-end test orders through your confirmed ordering route
- Confirmed invoicing will flow correctly into your finance system
- Completed internal sign-off from acquisitions, systems and finance colleagues
- Briefed academic liaison colleagues who handle requests or communicate with teaching staff
- Confirmed access and authentication for users is in place and tested
- Agreed a point of contact at your supplier for any issues during go-live

Transition live and review

- Monitored first live orders end-to-end, from placement through to fulfilment and invoicing
- Flagged and resolved any unexpected friction in the ordering workflow
- Confirmed users can access titles without issue
- Scheduled a short internal review to capture lessons and confirm everything is running smoothly