



Basic goals

- Provides an “upgrade path” for our systems
 - Marketplace is changing
 - Do we make a change sooner or later?
 - Together or separate?
- Cloud-based
 - Savings in hardware
 - Savings in maintenance, upgrades

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Productivity goals

- A full suite of management tools
- Automation & integration
- Centralization
- Collaboration

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A full suite of management tools

- A single integrated platform for managing print and electronic resources
- All campuses will now have access to ERM and reporting tools
 - Only a minority had ERM before
 - Reporting capabilities limited at most campuses

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Automation & Integration

- A single integrated platform for managing print and electronic resources
 - Instead of 3 to 5
 - Duplicate data entry
- Automate some tasks we do manually now.
- Integration with PeopleSoft, ILLiad, and other third-party services.
- Integration with discovery system

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Centralization

- Alma and Primo configuration & expertise
- E-resources management
 - CO to handle all aspects of ECC & opt-in's
- Authentication (Shibboleth)
- PeopleSoft (patron loads and financials)

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Collaboration

- Acquisitions
- Collaborative cataloging
 - Shared bibliographic database
- Analytics
 - Shared queries and reports
 - Systemwide view of collections and usage
- Circulation

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Project goals



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Strategic goals

- Considerable savings in \$\$\$ and time re-deployed into other areas.
- Resource Sharing
- Collaborative collection development
- Collaborative system development

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Ten Guiding Principles for Those Managing ERP Projects

- Ensure you have your senior executive's strident sponsorship.
- Make any ERP initiative a business transformation project; not an "IT" project.
- Find the most talented business-oriented manager within your organization and appoint them as project manager.
- Decide issues quickly and decisively.
- Communicate, communicate, communicate.

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Ten Guiding Principles for Those Managing ERP Projects

- Ensure the IT infrastructure is sufficiently robust.
- Never change ERP program source code. Change the business process instead.
- Test the configured ERP software until exhaustion.
- Plan user training, multiply by 10, and then hope it is sufficient.
- Set reasonable user and executive expectations before implementation. To get from here to there necessarily requires a period of consternation. Accept it as fact.

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