Unified Library Management System

COLD Meeting, September 2015

Overview

1. Where are we?
2. What's next?
3. How best to use meetings?

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1. Where are we?

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Project ramp-up

late July	Met with Ex Libris, initial planning
Aug.–Sep.	Organizing people and tools

– Hiring two new positions
– Comm. plan, listservs, website
– Project management
  • Project managers (local)
  • Working Groups (systemwide)

Oct. 5	Kick-off Meeting

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2. What's next?

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Vanguard Phase

- First phase of the project
  – Create initial test environment to explore consortium capabilities, configurations
  – Three campuses with representative data
    • San Jose
    • Northridge
    • Fresno
  – All campuses will have access to the environment

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Vanguard Phase (cont.)

- Timeline: Nov 2015 – Jan 2016
  – Configuration and migration forms due in Nov
  – Data load begins in December
  – Data load complete and environment released to CSU in January

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3. How best to use meetings?

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COLD meetings: ULMS Slot

- Strategic discussions rather than just updates
- Implementation concerns (15-16)
- Post-implementation concerns (16-17)

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Implementation discussions

- Resource sharing configuration (Oct)
  CSU-wide resource sharing; whither Link+, Circuit? integration with Illiad, etc.
- Staff training needs (Feb)
  What knowledge gaps can we bridge to help us achieve our strategic goals?
- Campuses helping other campuses (Apr)

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Post-implementation discussions

- Collaborative purchasing
  e.g. regional print purchasing, coordinated PDA based on campus programs
- Collaborative financial management
  e.g., centralize fund or vendor management outside of ERM, data warehousing for audit control
- Collaborative collection management
  e.g., regional print storage, coordinated deacquisitions

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Staff meetings: Factors

- Virtual meetings a big part of the project
- Milestones driven by Ex Libris
- Community building
- Staff interest in field trips to San Marcos, Sacramento
- Cost in terms of travel, time

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Milestones

2015	Sep. 10	Working group meeting
	Oct. 5	Kick-off meeting
2016	Jan.	Regional meetings
	Mar.	Implementation meeting
	Jun.	Regional meetings

Milestones + Work Group

2015	Sep. 10	Working group meeting
	Oct. 5-6	Kick-off meeting + workshop
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Milestones + Work Group + Regional

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