What problem are you looking to solve?

The new system is to replace a system that has been in place for over 15 years and replace a system run on a local server with a cloud-based system putting much less demands upon limited local IT resources. The current system is functional and supported but requires a problematic level of effort from library and ITS staff, while hampering innovation.

ALMA/Primo presents numerous functional advantages. It will allow the library to provide standard services to the community with less staff effort. The sharing of a system with all 23 libraries in the system will provide efficiencies of shared cataloging and management. The sharing of resources among CSU campuses will become more efficient and user driven. The provision of enhanced, modern services such as patron driven acquisition and integrated discovery will be facilitated. Services for the college of distance education will be enhanced.
Which departments or processes are affected?

**ITS:** PeopleSoft, CAS/LDAP/Shibboleth, Pharos, Moodle software may be integrated more effectively with the library system. Server administration responsibilities will be eliminated.

**Library:** All processes will be impacted. Independent systems that will be affected include EZProxy, ILLiad, Drupal, and Springshare.

**Student Services:** Integration with the student portal can be enhanced and library services can be more individually coordinated with student’s needs.

**Admin/Financial Affairs:** Effort to account for library purchases, fines, fees and income will be integrated via APIs eliminating duplicative keying and facilitating reporting and response to requests for auditing.

**Academic Affairs/Teaching:** More close integration with Moodle and greater access to resources, including open educational resources, will enhance learning opportunities.

**Distance Ed/eLearning:** More resources available through web-discovery will enhance learning services for offsite students.

What is the consequence of not doing this project?

Not participating in a CSU-wide initiative mandated by the Council of Library Directors and the Office of Academic Technology would put HSU greatly out of touch with the CSU system.

HSU would have to pay its share of the costs for the new system as well as the maintenance costs and ITS support costs of maintaining its old system.

What would a successful solution look like?

There would be more effective integration of campus and library systems. Library faculty and staff would have optimized and efficient workflows. A single integrated system would perform tasks on a web interface that are presently accomplished with multiple pieces of client software and free-standing applications. Integration with student portal and campus authentication would provide streamlined access for users while providing institutional research quality data on use of library resources for correlation with student success and other outcomes. An adaptive interface would provide more seamless access to users across a range of platforms.

How else might you solve this problem?

It is not an option to leave this unsolved.

Strategic Objective(s)

- Prepare students for meaningful relationships across differences.
- Prepare students for socially & environmentally responsible leadership.
- Prepare students for sustainable environmental & financial stewardship.
- Strengthen partnership with local communities
How does this project align with HSU’s strategic objectives?

This project support all four primary goals of the 2015-2020 Strategic Plan.

Goal 1: Expands diversity of readily available resources to students and facilitates research using the resources of other CSU campuses as well as libraries and research institutes worldwide.
Goal 2: Ensures diverse perspectives and resources are readily available to students, faculty, and staff. The flexibility and adaptability of this system will allow the library to respond quickly to new, diverse stakeholder’s information needs.
Goal 3: The efficient, intuitive discovery interface will be available to the local community and sharing of resources with local public and school libraries will be made more efficient.
Goal 4: Increased discovery and access to library materials within CSU system will allow the most cost-effective resource sharing strategies, reducing the need for costly duplication, while increasing the integration of resources and services, maximizing the use of University financial resources. The cloud-based system will conserve energy locally, reducing electricity use and use of physical space.

What resources will this project require?

Library: ULMS Team will be working with CSU ULMS Team and outside consultants/vendors. Some travel will be needed. ITS:
Tom Mendenhall’s time and expertise for data extraction and problem solving will be crucial to the success of this project. After his retirement, some highly skilled effort in data management and authentication will also be necessary, given the timeline. Information security expertise and expertise at the integration of campus systems, such as PeopleSoft, LDAP/CAS/Shibboleth, Pharos, and others will be required.

Steven Mottaz will be crucial to archive Voyager and other reports, particularly acquisition records and financial statistics. The transfer of current reporting and applications to the new Alma platform will be required, as appropriate.

DEADLINES

What is your deadline?

And is your deadline a hard deadline?
Yes

Why must the project be completed by this date?

Project must be completed by the System's Go Live Date of May 2017. The CSU live date has been established by the Council of Library Directors and the Office of Academic Technology. Missing this date will not excuse of from paying our portion of the system’s costs, but will also require is to bear the cost of renewing legacy Voyager system.
COSTS
Estimated annual initial costs
N/A

Estimated annual on‐going costs
$43K est. per year.

Funding Availability?
- Fully Funded - includes initial and on‐going costs
- Partially Funded - only initial OR on‐going but not both
- No Funding - for initial or on‐going costs
- No Hard Costs

Explanation of annual estimates
Costs have been negotiated, at the system level, to be similar to current maintenance paid by each of the libraries. For HSU the Ex Libris Voyager software, is approximately $43K per year. No additional funding for initial or on‐going costs. Library operating budget for ongoing Voyager maintenance will be applied to this project for ongoing costs.

TECHNICAL SECTION
Type
Upgrade
Affected or Related Systems/Modules

- 25Live
- Academic Works
- Biddle
- Blackbaud (Raisers Edge)
- CASHNET
- Class Climate
- CLETS (CA Law Enforcement Telecommunications Sys)
- College Scheduler
- DARS/U.achieve
- Drupal
- Facilities
- Faculty Center
- Google
- Hobsons
- KBox
- MAP-Works
- Maxient
- Moodle
- myHumboldt Portal
- Nolij
- OBI
- PBX
- PeopleSoft Campus Solutions
- PeopleSoft CFS
- PeopleSoft HR
- Pyramed/Propharm
- Questica
- Resource25 (R25)
- Schedule25
- Student Center
- Studio Abroad
- SPURR (Energy Data Management Sys)
- Other
Other Affected or Related Systems/Modules
EZProxy, CAS, Shibboleth, LDAP, Illiad, Subscription databases (Ebsco, Proquest, OCLC, and others), Dspace, BePress Digital Commons, Springshare Libguides

Considerations / dependencies
- Bibliographic data cleanup and test loading will be required.
- Patron data loading or linking and testing will be required.
- Linking of financial data for acquisition, fines and fees will be required.
- Business processes for acquisition of materials, processing of reserves, processing of interlibrary loans, patron driven acquisitions, and probably circulation of materials and realia will be re-engineered to take advantage of the new capacities of the ULMS.

Information Technology (IT) Feasibility Statement
Chief Information Officer Anna Kircher has been significantly involved in the planning of this project at the system level throughout its initial life cycle.

ADDITIONAL INFORMATION
Link to description of project: http://libraries.calstate.edu/ulms/
Link to System Wide project Wiki: http://ulms.calstate.edu
Link to System Wide master timeline
https://calstate.atlassian.net/wiki/display/ULMS/Master+Timeline
Link to HSU project Wiki:
Note that authentication is required, contact Project Champion for access. Attach pdf of initial screen, captured 10/15/2015 ULMS Implementation – HSU Library Wiki.pdf