



Your Partner in Modernization

A no-cost services offering to help
you upgrade seamlessly

esm[®]
Intelligent Together

Your Partner in Modernization

Committing to technology upgrades can sometimes feel like a risk. But the benefits are unquestionable: better systems, better processes, and a better way to connect your education community to the resources it needs.

That's why we've prepared this **no-cost** services offering to help you **upgrade seamlessly** to ESM Purchase and ESM Source, key components of ESM's modern, flexible procurement platform.

Key deliverables of the ESM upgrade program

Our upgrade services cover your institution's core procurement needs: helping you move your project forward quickly while avoiding common implementation pitfalls. We work with your team collaboratively (but efficiently) to achieve critical milestones quickly.

Services Provided to SUPPORT ESM Purchase

- **General Configuration Set-Up**
 - Locations
 - Users



- Training (Train-the-Trainer)
 - Workflow Approvals
 - Standard Reporting
 - Location Maintenance
 - User Maintenance
- Migration of data from your current software configurations
- Configure the Requisition to Quote Process
- Migration of core Catalogs (we include up to 10 Catalogs as part of the free service)
- Standard Configuration templates

Services Provided to SUPPORT ESM Source General Configuration Set-Up

- Template creation – we will build one and also teach you how to build and maintain templates
- Locations
- Users
- Approvals
- Supplier Registration and Distribution
- Standard Reporting
- Event Library Set-Up to Create Annual Events
 - Attachments
 - Users
 - Set up Approvals
 - Set up Supplier Registration and Distribution
 - Standard Reporting
- Training (Train-the-Trainer)
 - Event Management & Publication
 - Evaluation & Award
 - Requirements Bidding (optional)
 - Bid Tabulation Reporting

Additional Support

To help ensure the new services are working as you require, we will also provide three weeks of production support when your upgraded systems are ready for Go-Live.



Optional Additional Services

For those institutions that require additional assistance, we are pleased to offer the support of our Professional Services team. These additional services are billable and include areas such as:

- **Creation of Non-Standard Reports**
- **Provision of Additional Training Sessions**
- **Institution-Specific Non-Standard Configuration requirements**
- **Single-Sign-On (SSO)**
- **Institution-Specific Integration**
- **External (Non-ESM) Bids to Purchase Catalog**

Project Effort

For you to understand the level of effort expected from your team, we've provided some estimates below:

ESM Purchase

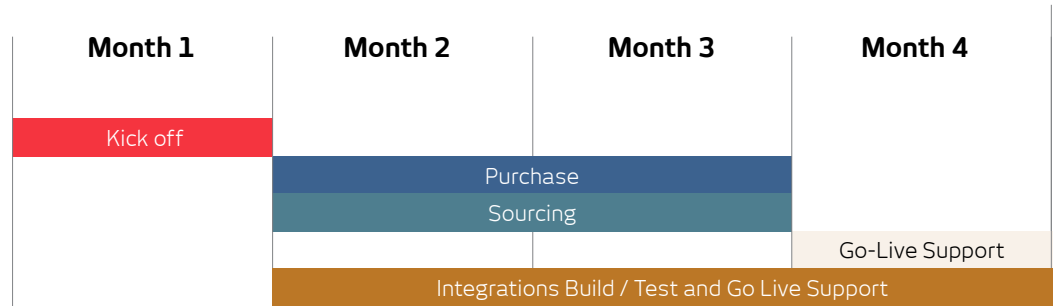
Activity	Duration	Institution Effort
Data Cleanup/Export	5 days	8-12 Hours
System Setup/Configuration	3 days	4 Hours
System Admin Training	3 Days	4 Hours
Data Import (Users/Locations/Accounts)	3 days	2 Hours
Workflow Training and Setup	5 days	16 Hours
Report Training	2 Days	8 Hours
User Training	3 Days	16 Hours
Storeroom (if applicable)	10 days	40 Hours

ESM Purchase

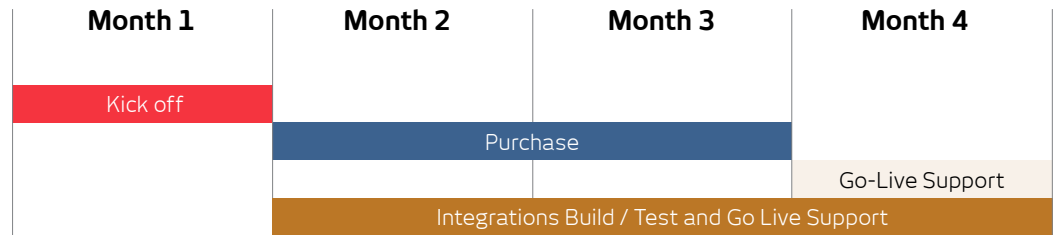
Activity	Duration	Institution Effort
Data Cleanup/Export	5 days	8-48 Hours depending on automation
System Setup/Configuration	3 days	8 Hours
System Admin Training	3 Days	4 Hours
Data Import		
Events	3 days	2 Hours if automated
Supplier Data		48 Hours if Manual Load
Integration to Purchase (if applicable)	3 Days	16 Hours
Report Training	4 Days	16 Hours
User Training (Requirements Bid)	5 Days	24 Hours



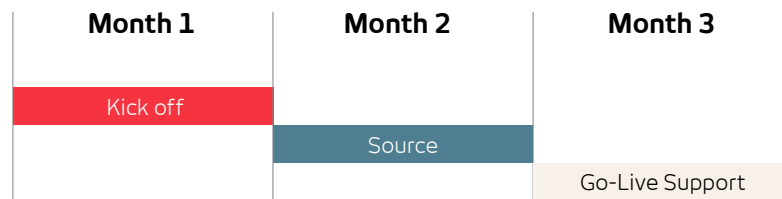
**Example Project Timeline:
Upgrade to ESM Purchase and ESM Source**



**Example Project Timeline:
Upgrade to ESM Purchase**



**Example Project Timeline:
Upgrade to ESM Source**



Who can I contact if I have questions about the upgrade process?

If you have immediate questions, you can open a Help Desk ticket by sending an email to support@esmsolutions.com.

We are confident that ESM Purchase and ESM Source will support your procurement ecosystem and help you deliver an even better experience to customers across your organization. We look forward to working with you during this next phase of our journey together.

