“Heirs to the Throne: How to Effectively Transfer System Administrator Duties to your Successor”

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Introduction

- Integrated Library Systems and their system administrators have evolved over time
- What are the essential skills (not duties) needed for system administrators?
- How to best transfer knowledge from one System Administrator to another?
Essential skills required by this position

- Excellent oral and written communication skills
  - Local Library’s liaison to LOUIS
  - Responsible for communicating all LOUIS policies to local librarians
  - Responsible for monitoring listservs and communicating with other librarians/system administrators

- Database management/maintenance skills/experience
Essential skills (cont.)

- Web design and web programming background
  - Responsible for e-library
  - Maybe library web page design
  - Link resolution for A-Z, EZ Prozy

- Understand ALL Symphony modules, but especially the Reports module

- Basic problem solving/troubleshooting skills…..think logically!
Preliminary questions to ask yourself before training

- Who is your successor?
- What do they need to know?
Four types of successors

I. Newbie to any system administrator responsibilities
II. Seasoned SIRSI back-up
III. Seasoned SIRSI administrator
IV. Previous non-SIRSI administrator
I. Newbie to any system administrator responsibilities

- Needs to be able to communicate with their peers
  - Especially important for newbies as they will need to ask their peers, locally and remotely for assistance.

- Good grounding in various software applications

- Basic web design and programming
Problem detection and basic troubleshooting skills

Need to have solid working knowledge of all of the modules and how they interact with each other.

Ability to teach others

If not possessing of all these skills, at least the potential to possess is there
II. Seasoned SIRSI backup

- Can be smooth transition if done right.

- This can be a daunting change for them depending on their previous level of involvement.
Seasoned backup (cont.)

• Pros:
  ◦ Probably already knows staff’s level of comfort with their modules
  ◦ Already knows local work-arounds, collection locations, etc.

• Cons:
  ◦ Could carry over bad habits of previous primary administrator
  ◦ Could have only been familiar with one or two modules
Seasoned backup (cont.)

What do they need to know?

- All skills previously mentioned, including:
  - Web design
  - Communication skills
  - Problem detection and troubleshooting
  - Database management
Seasoned backup (cont.)

- All routines by primary admin that backup was unaware of or did not participate in.
  - If level of involvement was low, then should be treated as if a newbie was taking the reigns.

- All the modules!

- Reports - who gets what?
  - Custom reports
  - Special reports (xfer directory)
III. Seasoned SIRSI primary administrator

- An administrator from another SIRSI site becomes the new primary system administrator
Seasoned SIRSI admin

- **Pros:**
  - Wealth of prior experience
  - May bring a different aspect of system functionality to the new library

- **Cons:**
  - May want to fit square peg into the round hole- “this is how we did it at…..”
  - Not aware of the local context and rationale for why things are done certain ways…
  - Size of library considerations
Seasoned SIRSI admin (cont.)

What do they need to know?

- All skills previously mentioned, including:
  - Web design
  - Communication skills
  - Problem detection and troubleshooting
  - Database management
Seasoned SIRSI admin (cont.)

- Level of staff involvement, experience, and knowledge of modules
- Specialized collections and locations of them
- Documentation - where to find?
- Reports - who gets what?
  - Custom reports
  - Special reports (xfer directory)
Seasoned SIRSI admin (cont.)

- ILLiad
- CONTENTdm
- Mini-consortia memberships
Seasoned SIRSI admin (cont.)

Basically the seasoned SIRSI system administrator should have all of the skills that they need, but they need to learn how to apply those skills to the local setting/context.
IV. Veteran non-SIRSI admin

Basically the seasoned non-SIRSI system administrator should have all of the skills that they need, but they need to learn how to apply those skills to the local setting/context **AND** they need to learn Symphony as well.
V. Methods of communication

- Transition plan and transitional personnel
- Breadcrumbs left behind
  - Notes and documentation
  - Training videos
    - Youtube, Camtasia and/or Adobe Captivate type
- LOUIS training
  - Individual training
  - System Administrator ‘boot camp’
1. Transition plan

- Meetings/Training sessions!
  - If replacement already on site, regularly scheduled meetings before transition
    - Best if broken up into small chunks of info
    - Could even break it up into knowledge clusters - acquisitions, cataloging, public services
    - Chance to include all staff
  - If replacement not on site before transition
    - Skype meetings??
    - Telephone conversation.
I. Transition plan (cont.)

- Training
  - The sooner the better
  - The more comprehensive the better