

SUCCESSION PLANNING



The Home of
International Taxation



Why?



What?



Where are we now?

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WHY?

- Expected retirement August 2027
- 20% reduction working hours in 2022
- Large variety of tasks

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WHAT?

- Documentation of tasks and procedures
- Hired Junior System Administrator in 2022

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WHERE ARE WE NOW?

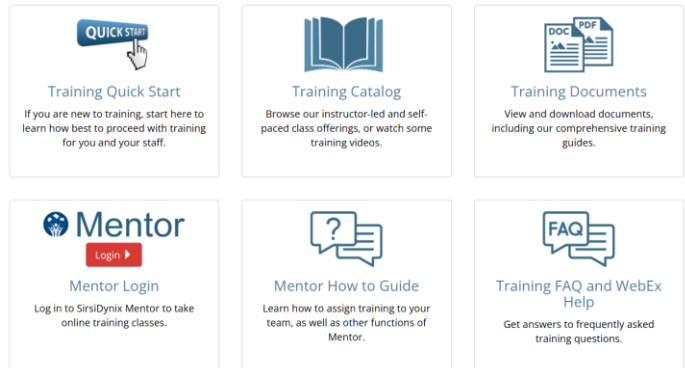
- Most tasks and procedures well documented
- Junior Sys Admin left in 2024
 - Replacement not hired
- Successor to be hired 3 months before retirement

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Support from SirsiDynix

- LRM contact details
- Training opportunities
- Guide to training
- Build a training plan
- [Instructor-Led Training subscription](#)



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- [Instructor-Led Training subscription](#)

What is the Instructor-led Training?

The Instructor-led subscription includes any instructor led, group (not private) courses via Mentor. This means that you can have one login or registration in six classes (regardless of class length).

Frequently Asked Questions

- Can we use two of the instructor-led courses for one course to allow multiple sites to login to a single class? Yes
- Can we use our instructor-led courses toward ANY group instructor-led class? Yes
 - Even if it is a class broken over two days? Yes
 - Even if the class is only an hour long? Yes
- Can we use our instructor-led courses toward a self-paced course? No. Self-paced courses cost a lot less than instructor led sessions. We suggest that each library maintain at least a basic [self-paced subscription](#) for staff to access the entire suite of self-paced classes.
- Can we track learner progress? Yes. Any staff member who is the "Mentor Manager" of another person within your system can track the progress of those they "manage" via "My Transcript" and "Reports" within Mentor.



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Support from SirsiDynix

- [Subscription Services](#)
- [Platinum Managed Services](#)
- [Offload System Administration Services \(OSAS\)](#)



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PSI-97513 - Platinum Managed Services (UK only)

The following services are included in the Platinum Managed Services subscription: To learn more details of each service, see the related content

Consulting Services

- Custom Consulting – 20 hours
- SureSelling Calls – Monthly
- Developer API Subscription
 - Unlimited access to online API training and documentation
 - Data Control
 - API Q&A
- Web Services SDK
- Enterprise Q&A

Data Services

- Annual Bibliographic Analysis
- Quarterly Authority Update (must have had initial processing completed within the last 12-18 months and outbound FTP access)

Training Services

- Five instructor-led training courses
- Unlimited access to self-paced training courses for 50 named users

Account Review and Planning

- Annual account review and planning session with your Library Relations Manager

Customer Support

- Dedicated phone number 0800 096 2412
- Weekend and evening upgrade support
- Priority call handling

Managed Services – SirsiDynix staff will perform the following:

- Monitor finished report status
- Set up reports including notices, EDIFACT, and routine data purges
- Rollover Acquisitions data at financial year end
- Maintain SirsiDynix-supplied custom Symphony reports through Symphony upgrades

Support from SirsiDynix

- [Subscription Services](#)
- [Platinum Managed Services](#)
- [Offload System Administration Services \(OSAS\)](#)



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Question: What is Offload System Administration (OSAS)?

OSAS is a subscription service from SirsiDynix where libraries can leverage the experience and knowledge of SirsiDynix staff to be part of the system administration team. OSAS consists of weekly service desk hours, SureService calls between onsite staff and your SirsiDynix OSAS consultant, and OSAS credits that can be used to purchase tasks from the OSAS catalog for your consultant to do for you.

Question: Do you have to be SaaS hosted to take part in OSAS?

Yes. In order to be an OSAS customer, your library must be SaaS hosted. This is because as part of OSAS, SirsiDynix puts into place a number of automated scripts that depend on the SaaS platform. The OSAS team also relies on the expertise of the SaaS team for operating-system support.

Additionally, being SaaS hosted ensures that the OSAS team has secured, reliable access to your server that complies with industry standard security requirements. This allows SirsiDynix to leverage the power of their global team to assist in the support and operation of your library.

Question: Who is our SureService consultant?

SureService consultants are SirsiDynix staff members highly experienced with the SirsiDynix integrated library systems. They are familiar with a wide variety of library types—such as public, academic, school or special—and are also informed of current trends in library-oriented technologies. This experience and knowledge allows your consultant to place the details of SirsiDynix products into a bigger picture that will help you make the best decisions for your library or organization.

Question: What does OSAS monitor for my library?

As part of OSAS, SirsiDynix takes on the task of monitoring your Symphony or Horizon system to ensure that Symphony reports have run correctly or Horizon DayEnd has finished without errors. In addition to your ILS monitoring, we also monitor BLUEcloud Analytics harvests, Enterprise Harvests, and BC Central Harvests for errors or issues.

Question: What am I (the library) responsible for?

Each OSAS library should designate at least one (1) point of contact. As part of your OSAS onboarding and analysis, that person will set the level of autonomy for the OSAS team. That can range from low level autonomy (OSAS is a 'member' of the local IT/system admin team doing routine tasks and monitoring) to high level autonomy (OSAS is the default sysadmin and is opening cases/initiating fixes on behalf of the library) This level of autonomy can be adjusted at any time.

Question: How do I request OSAS to assist with changes needing to be made?

The primary avenue for utilizing the OSAS team is done through Support Cases. When you become an OSAS customer, the OSAS team will monitor cases opened from your library. In addition, customers also have the option to designate a case for OSAS. For example, if your library needs a basic list report run in BLUEcloud Analytics, all you'd need to do is open a case with your request. Since OSAS is monitoring cases from your library, we'll see that you're requesting a report be created and sent and take care of it. Cases that are for issues with your ILS or other SirsiDynix products are routed to the proper Support Team. In the event of a downed system, please go to <https://support.sirsiDynix.com/kb/124656> to find the correct support phone number to call.

Question: How can I use my Scheduling credits?

Scheduling credits are used for a variety of System Administration tasks outside of the weekly service desk hours. Some of those tasks include User Loads from a file, Fiscal year rollover, Long-overdue/Lost process, additional 3rd party vendor support, and additional project planning consulting. Scheduling credits can also be used to purchase additional Service Desk time per week or additional Sure Service calls.

Support from SirsiDynix

[New System Administrator Orientation](#)

[Symphony System Review](#)

Assistance reviewing the system you've inherited

Service Description

Are you a new System Administrator for a Symphony library system? Let us take the stress out of getting familiar with the products your library uses.

We will schedule a call with you to review the products your library uses, make sure you know how to access each one, help develop a plan for learning the products, and provide a support plan for the products. We will take you by the hand and guide you through the following:

- installing the WorkFlows client
- staff logins and overrides
- routine maintenance tasks including important maintenance reports
- notices and other reports you may be running
- troubleshooting issues with your system
- opening a case with Customer Support
- developing a training plan



Note: If you are not a new System Administrator, but would like an in-depth review of your Symphony system, consider requesting our **Symphony System Review** instead. The two services cover some of the same topics. **Please do not request both.**

