

Onboarding Academic Librarians Training Manual Template

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The following template is the basis for the New Libraries' Faculty Guide at the University of Colorado Boulder, first drafted in Fall 2013. Please use as much or as little of this document as needed for your own training purposes. Our hope is that you will adopt and alter this template to efficiently and effectively train your own library's staff and/or faculty.

This MSWORD version for your convenience, but recommend building a template from the Google Drive version: bit.ly/newlibrariantrainingmanual. A cloud based approach will let you interact with all colleagues more effectively, as well as receive on the fly questions and updates.



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Training Modules:

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Appendices:

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1st Day

Insert a short description here. For example: Meet your supervisor, colleagues, and handle some basic paperwork. You will also activate a variety of online accounts that cover payroll, productivity, etc.

☐ **Task to be completed goes here**

Colleague(s) to contact

[Relevant webpage linked to if there is one](#)

A short description of the task may be typed here.

☐ **Log-in List**

The link below

[List of Account Log-ins to print out](#)

To keep track of services you need to access, please print out this list. There are at least 15 accounts you will need to work effectively at the CU Libraries. Some accounts require formal meetings with colleagues, others you can set up on your own.

☐ **Receive Organization Chart**

Your Supervisor

[link to organization chart](#)

The Organization Chart should be your guide to meeting colleagues in the library. Please take the time to arrange meetings with colleagues to understand how different units and your job duties overlap.

☐ **Technology Help System**

Any colleague

[Technology Help Site](#)

When you have technical or maintenance issues that need to be solved, use this site/system to submit your concern.

☐ **Set up Professional Email**

Any colleague

[No Linked resources](#)

Professional emails are sent and received through a work email address. The companion calendar is also used and all employees are expected to keep their calendars up to date in order to facilitate the planning of meetings. Ask colleagues for information about accessing your professional email account from home.

☐ **Regularly Scheduled Meetings (add to Calendar)**

Your Supervisor
No Linked resources

Instructions to set up regular meetings (in Outlook):
>> select 'calendar' in the lower left
>> new appointment
>> recurrence
>> set the start/end/duration
>> recurrence pattern select 'weekly' or 'monthly'
>> make logical choices in next context menu
>> select 'no end date'

Meetings to set up:
Library Staff Meeting
1st Thursday each month, 9 AM
Collection Development Meeting
2nd Thursday each month, 10 AM
Department meeting
Depends on your department

☐ **Get your Employee ID Card**

Your Supervisor
Card Services Office

Get your picture taken and receive your ID card.

☐ **Overview of Internal Library Listservs**

A colleague within your department
No linked resources

Ask the manager of library email service to be added to relevant email lists. Some lists may need supervisory approval, so be sure to cc your supervisor in your requests.

- All Staff <AllStaff@institution.edu>
- Collection Development <CollectionDevelopment@institution.edu>
- Department specific listservs

☐ **Helpful Links**

Link Below
[List of Helpful Links](#)

There are many websites available to access additional information which will help you adjust to the library. Use the above link to connect to a list of helpful links including information about who to contact about what, a link to the staff handbook, and more.

1st Week

Become acquainted with the Library, work through mandatory trainings, and set up a variety of systems that will help you succeed.

☐ **Get Keys**

[Human Resources](#)

[Human Resources contact](#)

Receive keys to your office space and any other spaces for which you are responsible.

☐ **Create your Email Signature**

[Link below](#)

[Email Signature Guidelines](#)

Create a standard email signature which will automatically be inserted at the end of all outgoing emails.

☐ **Set up your Office Phone**

[Links below](#)

[Voicemail Instructions](#)

General Phone Instructions. Review the instructions to setup your voicemail. Ask a colleague to call your office phone to verify that your phone extension is correct and to test your voicemail. Identify how to call long distance.

☐ **ILS Log-In Credentials**

[Your Supervisor](#)

[No Linked Resources](#)

Request the credentials for the Integrated Library System (ILS).

☐ **Tour your library**

[Designated library tour guide or supervisor](#)

[Map of Library](#)

Contact the library's designated tour guide or your supervisor to schedule a tour of your Library.

☐ **Schedule a Tour of Each Collection/Branch Library**

[Various contacts](#)

[See links for each branch/collection below](#)

Schedule a tour of each major library collection [and branch libraries if applicable] that are relevant to your job duties or subject specialties. [Collections and branches should be linked if they have their own webpage. Contacts' names should be linked to their email addresses.]

Archives

Business Library

Government Information

Music Library

Special Collections

Archivist

Business Librarian

Gov Info Librarian

Music Librarian

Special Collections Librarian

☐ **Create your Business Cards**

[Link below](#)

[Imaging Services](#)

Create a mockup of how you want your business cards to look using the website linked above. Feel free to ask colleagues for their business cards in order to view a variety of layouts.

☐ **Complete Mandatory Trainings**

[Link below](#)

[HR website](#)

There are X mandatory trainings which must be completed soon after your first day.

☐ **New Employee Orientation**

☐ **Discrimination and Harassment Training**

☐ **Fiscal Code of Ethics**

☐ **Information Security and Privacy Awareness**

☐ **Access the Intranet**

[Link Below](#)

[Intranet site](#)

The intranet contains a variety of useful information ranging from working documents, frequently asked questions, department and committee specific information, and current updates about technology.

☐ **Goal-setting**

[Your supervisor](#)

[No linked resources](#)

Schedule a meeting with your supervisor to discuss goal-setting, expectations, and the evaluation process.

❑ **Choosing your Health Benefits Plan**

Any other libraries' faculty member

[Benefits Orientation Website](#)

Deciding on the appropriate benefits package is a time consuming process, especially if this is your first time signing up for health insurance. You have X days from your official start date to sign up. If you don't select a benefits plan you will be automatically enrolled in one.

1st Month

Learn more about your role in the Library through more meetings with colleagues and by becoming familiar with additional technologies.

☐ **Working Groups/Committees**

[Various contacts](#)

[Working groups descriptions](#)

Familiarize yourself with the Working Groups and committees in which you can become involved. The above website contains each group's charges and a list of members. Speak with your supervisor about which Working Groups may be appropriate for you to join. You can also reach out to the members of the groups for more information.

☐ **Collection Development Introduction**

[Collection Development staff](#)

[Collection Development webpage](#)

Schedule a time to meet with the director of collection development about collection development in general as well as policies, the budget, and administering funds. Be sure to ask about the fiscal year deadlines for ordering materials, including DVDs and foreign language materials.

☐ **ILS Training**

[Colleague familiar with ILS](#)

[No linked resources](#)

Meet with a colleague to go over how to view titles, create lists, and review the history of library materials in the ILS.

☐ **Instruction Orientation**

[Instruction Coordinator](#)

[Library Instruction website](#)

Contact the coordinator of library instruction in order to gather more information about the library's teaching and learning goals.

☐ **Reference Desk Orientation**

[Reference Desk Supervisor](#)

[Reference Desk Schedule](#)

Schedule a Reference Desk orientation paying particular attention to how to track reference questions, opening and closing procedures, shadowing opportunities, and being placed on the Reference Desk schedule.

☐ **Social Media Summary**

Social Media or Communications Staff

Facebook

- Twitter
- Instagram
- Blog
- YouTube Channel

Contact the social media or communications staff to learn more about the library's social media opportunities.

☐ **Learn How to Create Website content**

Link below

Web designer or IT colleague

Request the software and other tools that will allow you to edit content on the library's website. Schedule a training session with the web designer or a colleague in IT.

1st Six Months

Now that you have completed short term tasks, it is time to think about the long term. Follow this list to establish a solid foundation for long term employment. It is important to begin thinking about what you have already accomplished in your position, what you hope to accomplish, and how you will record your achievements.

☐ **Start Recording Your Academic/Scholarly/Work Activities**

Any other faculty member

[Keep track of your activities](#)

Keep track of the professional activities in which you have engaged. Having a list of what you have accomplished and participated in will be beneficial for your annual review and it will help to keep your resume or CV current.

☐ **Meet with the Dean or Director**

Dean or Director's secretary

secretary@institution.edu

Schedule a meeting with the Dean or Library Director. It is important to meet the leader of the organization for which you are now a part.

☐ **Tenure Committee Meeting [for Academic Librarians ranked as faculty]**

Chair of the Tenure Committee

[Tenure Committee Website](#)

Meet with members of the tenure committee to ask questions about the tenure process and learn more about the difference between annual reviews and the comprehensive and tenure reviews. Discuss how tenure works and what the committee's expectations are.

☐ **IRB Training [especially for Academic Librarians]**

Any colleague

[IRB Training Website](#)

Completing research is a component of achieving tenure. Some of the research opportunities that you pursue might involve people and, therefore, require the submission of an IRB protocol to the Institutional Review Board (IRB). Before conducting human subjects research, make sure to complete the training on the IRB website (see link above).

☐ **Review Extra Benefits of Working at your Library**

Contact Human Resources

[Employee Discount Website](#)

Employment at an institution includes benefits in addition to a salary, insurance, and a retirement plan! As an employee, you will receive discounts at many local stores and financial

institutions.

☐ **Travel Reimbursement**

Human Resources

Travel Request Form

Complete a form to be reimbursed for expenses incurred while traveling to and attending professional events such as conferences or meetings.

Compact Checklist

This is a master list naming all the tasks to review in the first day, week, month, and semester of the *New CU Libraries' Faculty Guide* and can easily be printed out for the benefit of a new employee.

First day

- ☐ Log-in List
- ☐ Receive Organization Chart
- ☐ Technology Help System
- ☐ Set up Professional Email
- ☐ Regularly Scheduled Meetings (add to Calendar)
- ☐ Get your Employee ID Card
- ☐ Overview of Internal Library ListSrvs
- ☐ Helpful Links

First Week

- ☐ Get Keys
- ☐ Create your Email Signature
- ☐ Set up your Office Phone
- ☐ ILS Log-In Credentials
- ☐ Tour your library
- ☐ Schedule a Tour of Each Collection or Branch Library
- ☐ Create your Business Cards
- ☐ Complete Mandatory Trainings
- ☐ Access the Intranet
- ☐ Goal-setting
- ☐ Choosing your Health Benefits Plan

First Month

- ☐ Working Groups/Committees
- ☐ Collection Development Introduction
- ☐ ILS Training
- ☐ Instruction Orientation
- ☐ Reference Desk Orientation
- ☐ Social Media Summary
- ☐ Learn How to Create Website Content
- ☐ Meet/Contact Predecessor (if any)

First Six Months

- ☐ Start Recording Your Academic/Scholarly/Work Activities
- ☐ Meet with the Dean or Director
- ☐ Tenure Committee Meeting
- ☐ IRB Training
- ☐ Review Extra Benefits of Working at your Library
- ☐ Travel Reimbursement

Log-in List

To keep track of services you need to access, please print out this list. There are nearly X accounts you need to work effectively at your library. Some accounts require formal meetings with colleagues, others you can set up on your own.

Service	Contact
<input type="checkbox"/> Email password	→ IT colleague
<input type="checkbox"/> ILS password	→ IT colleague
<input type="checkbox"/> Voicemail	→ IT colleague
<input type="checkbox"/> Reference Tracking System	→ Reference Desk Manager

Helpful Links

- General Resources
 - My CU Info
 - Who to Call About What
 - Internal Libraries Information
 - Libraries Administration
 - LibShares
 - Committees
 - Working Groups
 - Chinook (the Libraries Catalog) vs. the Libraries Homepage
 - Software
- Communication
 - Outlook Web App
 - Using your Office Phone
 - Setting up Voicemail
 - VPN (Network Connect)
 - Slowly becoming obsolete, but needed for rare cases
 - CU Libraries News and Log in
- Collection Management & Support for Subject Specialists
 - Guide to Ordering Materials
 - Oasis
 - CU Databases
 - New books RSS Feeds
- Reference Desk, Consultations, and Instruction
 - Research Desk Portal
 - LibraryH3lp WebChat
 - Beta Analytics (our reference question tracker)
- Professional Development
 - Faculty Handbook
 - Record your Scholarly & Professional Activities (template)
 - Instruction Activity Reporting Form
 - CU-Boulder Libraries Open Access Fund
 - Travel and/or Scholarly Support Request Form
 - FRPA (Faculty Report of Professional Activities) *due every January*
 - Login via My CU Info: CU Resources Tab >> Login to FRPA
- Other
 - On the Job Injury Procedures