

NEOS Access Services Committee Meeting
February 28, 2017
Meeting Minutes

Attendance:

In Person: Bonita Bjornson (King's), Karen Hildebrandt (CUE) (Recorder), Marg Sheppard (NorQuest), Roger Salus (Covenant), Michelle Bezenar (MacEwan), CJ de Jong (U of A), Anne Carr-Wiggin (NEOS), Peggy Morgan (U of A – ITS), Roberto Pellegrino (AITF), Laura Lemmons (AGL)

Teleconference: Donna Gordon (AHS), Corinne Hope (Keyano), Lyndsay van der Hoek (Olds), Wilmer Tenerife (Burman), Barbara Mahoney (RDC), Kathy Williams (Lakeland),

1. Bonita called meeting to order at 10:08 am
2. Minutes from the November 2016 meeting were approved as amended.
3. Training: Northern Lakes – Anne
We will need to provide training to Northern Lakes. They are a Symphony site so have some knowledge of the software but will need training on the NEOS procedures and policies in Circ. Will need 2 rounds of training. One in April/May and another around go-live June/July. Bonita, Marg, and someone from UofA and/or MacEwan will be on the training team. We have about a month to get the training implementation materials together. Anne will share the Google docs with Access Services Committee so they can select a document to work on and identify gaps that need to be filled. Some documents may only need a few bullet points. Deadline to review and comment is March 15, 2017.
4. Workshop Ideas – Bonita.
Today is the deadline for NEOS Mini-conference session proposals. MeeScan was suggested as a session as were the following for Lightning Strikes: Booking Module and Preferred Name.
5. Check-in about changes – TAL Card, External Cards, Home Card Barcodes – Anne.
It is taking time to implement but seems to be working for the libraries that have started to use the home barcodes.
6. Lost Books Paid Online, Via Self-Check machines or payments taking in error – Anne.
Every year Peggy runs a report to identify Lost Items that have been paid to another library rather than the owning library, generally online. There are sometimes also payments taken in error at a service desk. Please remind staff that clients who have lost an item should always be referred to the owning library to discuss what payment should be made. Libraries will often just ask for a replacement or charge a replacement

fee that is lower than the default price that appears in people's accounts when a book is 31 days overdue.

7. Transits 10+ and Communication Questions – Karen.
Reminder for everyone to check to the Transits 10+ and Pending Transits list. If everyone checks we wouldn't have to send emails to the libraries. The owning library needs to mark the items missing that have been intransit for a long period of time. We were reminded to only use the Mark Item Missing wizard.
8. Upgrade to Symphony 3.5.2. – Peggy.
Next upgrade tentative end of April. Peggy sent out the upgrade and release notes. Not a lot of new features. There are a few circulation enhancements. The two are in Peggy's summary sheets that were circulated as shown below. We have time to consider these options regarding Renewals but there are drawbacks to both. The second option is only available if the first one is implemented.

Circulation Enhancements to note:

1. Renewal options (meant to be configured in tandem):
 - The first option allows one of two choices when renewing items – the loan period can be extended from the original due date or from the date of renewal (current practice). The policy is applied by circ rule.
 - The second option prevents patrons from renewing items until a set number of days before the due date. The policy is applied by circ rule and only pertains to unseen renewals. All public catalogue renewals are considered unseen renewals.
2. Workflows single sign-on authentication. This will not work in our NEOS environment since there is too much diversity in individual staff networks across the consortium.

Bugs:

Corrected in the upgrade:

1. Viewing the demographics tab in Modify User will no longer prompt staff to save changes unless changes have actually been made.
9. NEOS CONNECT Bins and Bags – CJ updated us on this change. We will be moving to a blue bin/blue bag for all libraries. The plan is to consolidate all the blue bins and bags so that they can be sent out where needed rather than have them associated with each library. U of A will put together a cost for bins and bags that are needed. CJ's team will send back the old bins to the owning libraries. It is up to each library to decide what to do with their old bins that are no longer used for transiting materials to BARD. Implementation will take place as soon as possible.
10. CJ and Laura were investigating Automatic renewals. One library (Leeds Beckett) is piloting this and will let CJ know how it is working.
11. Next Meeting April 11, 2017 10 am.