

NEOS Access Services Committee Minutes

March 31, 2021

Minutes

Attending: Lana Thompson (MacEwan University) (Chair), Paul Pype (Alberta Government Library), Melanie Belliveau (Alberta Health Services), Wilmer Tenerife (Burman University), Tara Sommerfeld-Gladue (Covenant Health), Amanda Wills (Grande Prairie Regional College), Kathleen Brennan (Keyano College), Bonita Bjornson (King's University), Kathy Williams (Lakeland College), Kaitlin Kirk (Northern Lakes College), Samantha Nugent (NorQuest College), Jim Derksen (Newman Theological College), Kelsey McMann (Olds College), Barbara Mahoney (Red Deer College), Natalya Brettle (University of Alberta), Cayla Thorlakson (Vanguard College), Scott Davies (University of Alberta ITS), Elaine Coupland (University of Alberta ITS), Anne Carr-Wiggin (NEOS)

Regrets: Roberto Pellegrino (Alberta Innovates), Debbie Quast (Concordia University of Edmonton)

Guest: Emily (MacEwan practicum student)

1. Approval of Agenda

The agenda was approved by consensus with the addition of Bills Notices – Scott.

2. Approval of Minutes from February 23, 2021 meeting.

The minutes of the February 23, 2021, meeting were approved by consensus.

3. Alberta Government Library Closure - Paul Pype / Anne Carr-Wiggin

NEOS Executive received official notification of the closure of the Alberta Government Library and their subsequent withdrawal from NEOS. Projected date of work done in Sirsi to withdraw AGL is June 30, 2021. Last official day that the library will exist is July 2, 2021 but circulation will discontinue this week. NEOS members can no longer place holds on AGL items. Any remaining holds will be canceled manually. AGL users have been asked to have everything back by April 23rd, 2021. The goal is to make sure everything that belongs to other NEOS libraries is returned and sent back to the owning libraries. All AGL library cards are set to expire April 16, 2021.

When will AGL items be removed from the catalogue? There is no completion date at this time and all items can remain in the system until AGL has had enough time to sift through.

From a user point of view, will the AGL items display in the system as not available? When will a user know that they cannot access AGL items? Users will probably be able to start the Holds process but once they enter their barcode/pin the system will likely say "Hold not allowed" if the AGL item is the only item that is on the record. For those institutions using Blacklight as the catalogue, it's possible that the place hold button will not appear.

4. Symphony System Update - Clients in use

April 30, 2021 is the date set for the Sirsi system update – early in the morning. There do not seem to be any exams scheduled for that day and most institutions begin Spring session on the following Monday.

If you are using WorkFlows on Friday April 30, it will work as it is backwards compatible. Elaine will make things available on Google drive that shares out the client files to upgrade the client after April 30. Institution's IT can put the files in ahead of time because they are backwards compatible. They can also put them in after the upgrade. No need to coordinate the timing. Just be aware that if you apply the files early there will be a message and if you apply later there will also be a message – your client is out of sync.

Let Elaine know :

What you are using:

- Desktop
- Webclient
- Remoting in

If you have:

- People coming in that day using WorkFlows in the office

If we are open that day should we be doing manual circulation?

It would be safest to do manual circulation that day using the down time procedure. You will not be able to circulate when the system is down. Discovery (will not get hits from the NEOS catalogue), Holds, ILLs, Circulation, Returns, Cataloguing, Acquisitions will all be down. We are unable to restore any transactions that are entered while the system is down, so it is best if you circulate manually. Information about the closure as well as the release notes will be sent out to both the Access services and the Tech services (acquisitions and cataloguing staff) listservs.

5. Managing Items in Transit

When do we mark something missing and get an item off the Transit list? If you mark items Missing prematurely it stops the item being searched at the other end (borrowing library). Do people prefer to reach out to the borrowing library to confirm that the item has been searched and close that loop for before marking it missing or would people rather wait a specified period of time?

There have been concerns about contacting borrowing libraries in regards to In Transit item. Messages were sometimes being sent out to all NEOS members rather than to the specific borrowing library.

Emails to borrowing libraries are acceptable after a month to 6 weeks.

Is there a possibility of having a template for the email? It was suggested that we keep these messages simple.

Who do we contact? Where do we find contact information? – Send to Access Services representatives otherwise it'll have to be another email that people have to find and keep track of.

<https://neoslibraries.ca/neos-groups/access-services-committee/> - check your info on this page

Send requests to update your information to libhelp@ualberta.ca

MacEwan has launched a new ticketing system. When you email their generic email (library@macewan.ca) you will get a message that the ticket has been created. It might look like spam but it is not. Let Lana know if you send an email to the generic address and do not receive a response.

Scott will make changes to the Transit document and will add procedures to Google Drive and the website.

6. Fees for Secondary and External Borrowers & Fee Payment at UofA

Currently there is no way for Secondary or External borrowers to pay their overdue or lost item fees online through the UA portals. Until recently they were able to come into the library and use the self-check machines. UA has gotten rid of the self-check machines and will be switching to MeeScan. When we start lending to externals again we don't have a way for them to pay their fees through UA. We may have to temporarily redirect externals to pay their fees at other NEOS locations or later they may be able to pay over the phone to UAL Financial Services .

Not all external or secondary borrowers have the option to pay online unless they belong to a library that offers this. They have no option to pay if they cannot pay onsite. UA will be looking to find solutions to this but for now we need to be aware that they may encounter patrons with this difficulty. Blocking accounts is more effective than charging overdue fees to patrons.

Kings – log in through the student portal / library book / pay fee

MacEwan has a desk now open where patrons can pay fees with credit or debit

UA – when financial services is back on staff, patrons can phone in and pay over the phone

7. Two Year Missing - Procedures (May, October, March)

The lists were generated and announced in May 2020, but some libraries may not have been able to complete searching due to our difficult circumstances last year. The updated list was produced in October 2020 but we did not announce this, given the ongoing uncertainties. Scott has not proceeded with any of the usual discarding work this month.

The group discussed whether the preference is

- 1) To finish out the work on last year's lists (items missing/lost before May 31, 2018) on a delayed basis over the spring/summer

- 2) To simply begin the process over again as usual this May, with lists of items missing/lost before May 31, 2019. The lists will just be longer this time around because the previous round of discards didn't happen.

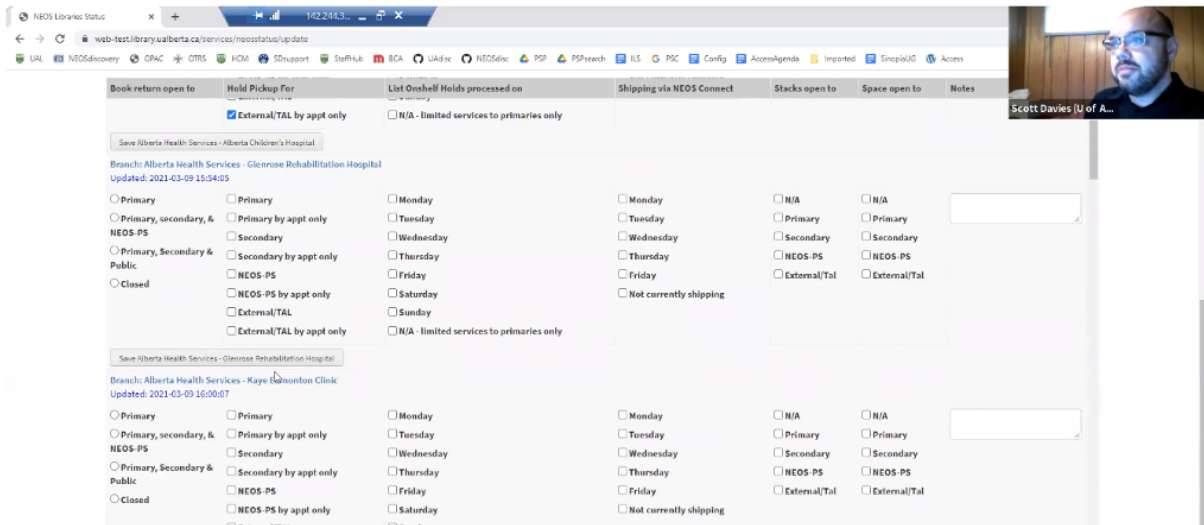
There needs to be consensus from a systems standpoint.

The consensus is to begin the process over again as usual this May – will be a 3 year list of missing items LOST, LOST-PAID, LOST-ASSUM, LOST-CLAIM or MISSING - as of date last charged **May 31, 2019 or earlier**.

8. Tool for Libraries' Status – NEOS Library Status Dashboard

This will replace the spreadsheet of NEOS info where we have been tracking the status of NEOS libraries. Each Access Services committee member will have access to this via their **barcode and PIN**. Scott will send an email to all member when this tool becomes available. Please update the information for your institution when the tool is operational.

<https://web.library.ualberta.ca/services/neosstatus/index.php>



Each NEOS Access Services representative needs to send Scott their library barcode.

Institutions can have more than one access to this tool. You can use a generic barcode. Check with Scott

9. Bills Notices

First box shows the bills that were captured by that notice last Tuesday.

Second box shows that 220 items have been cleared up

Should we move towards sending another Bills notice out before the end of April?

Yes – Scott will schedule another Bills Notice before the end of April.

NEOS Bill Library Groups - current only TEST Metrics Count (Bill Id) Sum (Bill Amount) 1			Count (Bill Id) Sum (Bill Amount) 1	
AB Government	169	\$25,350.00	102	\$15,300.00
AHS	11	\$1,650.00	10	\$1,500.00
Burman	54	\$8,100.00	54	\$8,100.00
Concordia	55	\$8,133.00	50	\$7,383.00
Covenant Health	6	\$900.00	6	\$900.00
GPRC	137	\$20,550.00	131	\$19,650.00
Keyano	77	\$11,550.00	73	\$10,950.00
Kings	86	\$12,661.50	86	\$12,661.50
Lakeland	24	\$3,600.00	22	\$3,300.00
MacEwan	409	\$78,697.03	388	\$75,547.03
Newman	25	\$3,750.00	24	\$3,600.00
Northern Lakes	45	\$6,750.00	44	\$6,600.00
NorQuest	98	\$14,700.00	71	\$10,650.00
Olds	20	\$2,353.90	18	\$2,211.20
Red Deer	114	\$17,100.00	107	\$16,050.00
UAlberta	1,615	\$241,852.77	1,539	\$230,585.79
Vanguard	26	\$3,900.00	26	\$3,900.00
Total	2,971	\$461,598.20	2,751	\$428,888.52

10. Next Meeting Date – Tuesday May 11, 2021 @ 1:00 pm.