

## NEOS Technical Services Committee

April 22, 2021

Via video call

### Minutes

**Present:** Emily Shaw (Alberta Health Services), Taras Kurylo (Alberta innovates), Wilmer Tenerife (Burman University), Myrna Dean (Concordia University of Edmonton), Tara Sommerfeld-Gladue (Covenant Health), Amanda Wills (Grande Prairie Regional College) Jolene Linfitt (The King's University), Linda White (Keyano College), Laura Somerville (Lakeland College), Susan Jones (MacEwan University), Gisele Ramgoolam (Norquest College) Tara Gunsch (Red Deer College), Kaitlin Kirk (Northern Lakes College), Brian Stearns (University of Alberta Cataloguing and Metadata), Ian Bigelow (University of Alberta) Karina Dunn (Vanguard College), Anne Carr-Wiggin (NEOS)

**Regrets:** Lisa Drysdale (Alberta Government Library), Jim Derksen (Newman Theological College), Caroline Vandriel (Olds College)

**Guests:** Fairfax Culpepper (University of Alberta), Sue MacRae (MacEwan University), Abigail Sparling (University of Alberta), Kathy Williams (Lakeland College), Sam Popowich (University of Alberta)

#### Review and Additions to the Agenda

The agenda was approved by consensus.

#### Approval of the minutes of the November 26, 2020 meeting

No changes needed.

#### OUTSTANDING BUSINESS FROM THE NOVEMBER 26, 2020 MEETING

##### 1. Document Review

###### a. NEOS General Agreement on Shared Principles for Cataloguing

**From the November 26, 2020 meeting:** *The general agreement may have been incorporated and included in **Doc 1**. Suggestion: The general agreement could then be revised to point to what is in Doc 1 (and revise what is said in Doc 1). This would be a shift in responsibility as this committee drafts and approves what is in **Doc 1**. Request for people to work on this will be sent out via the listserv.*

- Anne Carr-Wiggin has a newer version of the document but is unable to access it. When she has access to the document, the committee can review the document.

- Document can be emailed out via NEOS listserv before the next meeting October/ November to prep for verbal discussion

**b. NEOS Technical Services Terms of Reference**

**From the November 26, 2020 meeting:** *Changes agreed upon will be made and the document will be brought back to the next meeting for further discussion where necessary and approval.*

Revisions to the document were reviewed and approved by the committee by consensus.

**2. Serials Working Group**

**From the November 26, 2020 meeting:** *Extend a membership call for a new working group to address the recommendations of the recent NEOS Serials survey.*

- A call went out, the group was formed, and work is progressing. **More discussion later in the meeting**

**3. Local MARC fields review**

**From the November 26, 2020 meeting:** *A message will be sent out on the listserv asking for feedback on this.*

- Amanda Nagyl did post a message on the NEOS Tech list. **No input received so far.**

**NEW BUSINESS**

**4. General update:** Pandemic, budget, and ongoing operations (roundtable discussion)  
**Defer this topic till the next meeting**

**5. Continuing Resources Work Group**

**Summary from Linda White:** *Continuing Resources Work Group*

Work group members: Claire (MacEwan), Maria (RDC), Linda (Keyano), Jordan (UAL), Abigail (UAL)

The working group has begun to create documentation and training resources based on the results of the recommendations and as a group we have begun to prioritize the individual responsibilities for committee members and are currently documenting the formatting and looking at the possibilities available to provide convenient online accessibility.

The work group has created documents for title changes, creating Access Points, creating hybrid AACR2 and RDA records, common changes, integrating resources and are currently reviewing these checklists and will be discussing any needed updates, as well as the formatting and documentation of the guide.

## **6. Closure of the Alberta Government Library**

- a. An expression of gratitude to Lisa Drysdale, the current committee member for the Alberta Government Library, for her dedicated and informed contributions to the committee. As well, a thank you to all the former committee members, representing the Alberta Government Library, for their significant contributions to the work of the committee.

**Thank you to the AGL for contributions to NEOS.**

### **b. Closure considerations (University of Alberta)**

- 371,000+ ebook records in catalogue, when to start discarding? **Waiting for the go ahead to start work on clean up**
- Handling of free/NEOS free e-resources
- Print collection – **Collection will be offered to the ministries first. Elaine and Scott are working with them to make changes to the collection.**
- Other considerations – **There are worries about indexing overrun and how to handle the discard process in a timely manner**

## **7. University of Alberta Library and NEOS Discovery Updates**

- a. University of Alberta Library move from Blacklight to EBSCO Discovery Service in early May
- b. Formation and charge for **NEOS Discovery Committee**  
**Summary from Sam Popowich:** UAL is moving from Blacklight to EDS on Monday, May 3. This won't have a direct effect on NEOS libraries, except that we have made a change to our Symphony Web Services place hold function which has allowed NEOS libraries to use it in their EDS and Worldcat discovery systems.

The NEOS Discovery Subcommittee has had two meetings so far. We are putting out a survey about discovery usage and requirements in NEOS libraries. We are also starting to think about longer-term NEOS discovery strategy, since the NEOS Discovery Blacklight system will be end-of-life in about 18 months.

## **8. University of Alberta Library MARCIt Process Update**

**Summary from Abigail Sparling:** University of Alberta library is working to transition their current SFX-ILS update system (SFX2Sirsi) to MarCIt. The impacts of this transition will be:

- More e-journal records in the catalogue (1 record for every title we have access to, with the exclusion of a few problematic collections)
- Improved record quality. We will be upgrading poor quality records where a pcc record is now available through MarCIt for those titles. A majority of these upgrades will be done

during the marcit transition, but we are also building a report to identify upgrades on a regular basis.

- After the transition UAL will not be using summary holding records or cumulative coverage statements in the 856|3 for any title that is linking through SFX. Titles with direct links to providers will still be given a summary holding record and coverage statement in the 856|3. This decision was made after investigating how coverage and summary holding records were handled by other academic universities. It will significantly reduce the amount of updating that needs to happen to UAL e-journal records, leaving the coverage statements in SFX as the authoritative source of our coverage data/entitlements.

**9. NEOS Decolonizing Description Working Group Update:** Brian Stearns (University of Alberta), Gisele Ramgoolam (Norquest College), Anne Carr-Wiggin (NEOS Manager) Brian Stearns has identified 5 steps required to arrive at the completion of changing inappropriate and offensive subject headings in the library catalogue with respect to Indigenous peoples. Currently, steps 1 and 2 (searching and populating) the subject headings into a spreadsheet are complete as of the end of February 2021. Step 3 is now in progress and is more so the intellectual work of deciding on the proposed changes. Step 4 is the creation of authority records and step 5 is the technical aspect of the work. A sample of subject headings has been put through all steps in the test database. An acknowledgement statement that member libraries can place on their website with respect to the offensive and inappropriate terms used in the library catalogue will be sent to all libraries shortly.

**10. COSUGI Conference (Customers of SirsiDynix Users Group, Inc.),** Ian Bigelow (University of Alberta)

Elaine Coupland, Abigail Sparling, and Ian Bigelow will be attending Cosugi for the University of Alberta Library. Please have a look at the program and let us know if you would like follow-up on any sessions, or have specific questions for Sirsi.

**12. NEOS MiniConference – Workshops Planning**

Catalogathon. Is there interest in having one this year?

- Brian Stearns will plan something for the Friday following the conference
- Current topics of interest: E-resource cataloguing, Serials/ Periodicals, Bibframe
- If there are any other topics members want covered, send ideas to Brian

Other workshops?

There will be two technical services presentations at the conference.

**13. CONSER and BIBCO**

- a. University of Alberta is now a member of [CONSER](#) and we are expecting [BIBCO](#) approval soon.

- b. University of Alberta has been a member of PCC through NACO for some time, but we wanted to pass on this information as our further participation in PCC has an impact on our application of standards and practice.

#### **14. Follow up: Open Access sets (NEOS Free) and usage across NEOS – Update**

Link to draft guidelines sent to NeosTech on March 6, 2020 with request for comments, there haven't been any. Any further feedback? Discussion as needed:

*Hello, The UAL Monograph Cataloguing Team has drafted guidelines on submitting open access ebook collections to be added to the NEOS catalogue. While we do not get these requests very often, we thought it would be beneficial to establish a process for handling them so that we are consistent. We would very much appreciate any feedback you have. You can provide feedback by commenting on the document or through email, either on this listserv or directly to the Mono Cataloguing Team at [bibebook@ualberta.ca](mailto:bibebook@ualberta.ca). Thank you!*

**Guidelines will be sent out a second time to the ListServe.**

#### **15. “Illegal aliens” Subject Heading Project**

Brian noted that with various other institutions making local changes to this subject heading, we are testing making the same changes to implement in our database. The process should be the exact same as what is used for the Decolonizing Description work so allows us also to test that.

- Briefing document: "Illegal aliens" proposal
- Brian has made a proposal for changing the subject headings involving illegal aliens and aliens. We need to think about how we are going to do the technical work for this transition. This can be a good test leading to the decolonization work. Also, to see how we maintain changed subject headings on an ongoing basis.

#### **16. Linked data implementation planning, Sinopia and Share-VDE**

- a. Planning for linked data implementation has been ongoing at the University of Alberta, and work continues on the development of Sinopia and Share-VDE.
- b. More documentation on the Linked Data Implementation Plan is forthcoming, but I wanted to have a quick discussion about how to engage with NEOS-Tech for this transition.
  - Documentation will be shared sometime in the near future
  - Ian will set up a separate meeting to go over Linked data and what these changes imply

#### **17. Follow up: OCLC Reclamation planning**

For those that work with OCLC, please review the project scoping document, and reach out if you want to be included in the planning/implementation process.

- Call for more participation, planning is scheduled for some time in Jung

- Ian will schedule a meeting for current members and anyone else interested.

**18. Minute Taker at Next Meeting: TBA**

**19. Standing Agenda Item: Committee documentation (ALL)**

Defer till next meeting

**20. Next meeting TBD**