

**NEOS Technical Services Committee Meeting**  
**October 28, 2021**  
**Meeting Notes**  
**Via video conference**

**In Attendance:** Emily Shaw (AHS), Taras Kurylo (Alberta Innovates), Wilmer Tenerife (Burman), Myrna Dean (Concordia), Roger Salus (Covenant Health), Eden Murray-Black (Grande Prairie), Linda White (Keyano), Michelle Selensky (Kings), Kathy Williams (Lakeland), Susan Jones (MacEwan), Gisele Ramgoolan (NorQuest), Kaitlin Kirk (Northern Lakes), Caroline Vandriel (Olds), Tara Gunsch (RDP), Ian Bigelow (UAL), Karina Dunn (Vanguard), Anne Carr-Wiggin (NEOS),

**Regrets:** Tara Sommerfeld-Gladue (Covenant Health), Jim Derksen (Newman)

**Guests:** Elaine Coupland (University of Alberta)  
Abigail Sparling (University of Alberta)  
Brian Stearns (University of Alberta)  
Vanessa Bangay (MacEwan)

**1. Call to Order, welcome, and introductions**

**a. Review and Additions to the Agenda**

- One information item added to the agenda for the transition of RDC to Red Deer Polytechnic

**b. Approval of the minutes of the April 22, 2021 meeting**

We thank Emily Shaw (Alberta Health Services) for preparing these minutes.

The minutes were approved by consensus

## **Follow-Up**

**5. Document Review**

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

Ian Bigelow has kindly updated the list of common internationally recognized standards for resource description that is in the document. For discussion:

There was some confusion about versioning for the General Agreement as Brian Stearns had added commentary and revision to another copy of the document. As a result, this agenda item was left to the end of the meeting to allow for links to be updated. NEOS-Tech then discussed the document and related updates live during the remainder of the meeting.

With edits made during the call and the need to clean up the document further it was decided that an updated version would be created and shared with NEOS-Tech via email for approval.

The committee reviewed the draft revision and agreed via email to send it to the NEOS Executive Committee for consideration, and then to the NEOS Directors meeting on November 26

These versions were shared with NEOS-Tech on Nov 1st

- [Track changes version](#)
  - [Clean copy](#)
- b. **NEOS Technical Services Committee Terms of Reference** (*reviewed and approved by the committee at the April 22, 2021 meeting*)
- c. *Approved at NEOS Exec in April 2021.*
- i. *Clarification that these approvals were added to the agenda for information.*

## NEW BUSINESS

**6. Concordia University, for information:** Myrna Dean, Concordia University of Edmonton  
Concordia University of Edmonton is ending its service relationship with the Concordia Lutheran Seminary on March 31, 2022. Prior to this date CUE will work with CLS and University of Alberta to remove this branch location and its items from the NEOS catalogue.

**7. Request for information on Sirsi Integrated Library System (ILS)** Giselle Ramgoolan, NorQuest College

- a. Where is UAL on the ILS, are we staying with SIRSI, and if so, where are we on the adoption of various BLUEcloud applications?
- b. Does SIRSI CloudSource OA require the BLUEcloud library service platform?

Anne: Anne noted that information on ILS review had recently been brought to the NEOS Executive Committee by Weiwei and will be communicated to Directors at the November meeting.

Elaine: There is an upcoming meeting to start discussion about ILS needs. This is at a very initial stage of analysis with a first meeting next week. First discussion at UAL, then discussions will go out further, including NEOS. There will be further on this at the next Directors meeting. It will not be a quick change - 3-5 year plan with little over a year to plot a course. Sirsi will remain in the mix/consideration for what we will look at. Will be looking for something that can utilize native BIBFRAME. Also initial discussions with Sirsi coming up about LD, bf: and strategic priorities.

WRT Blue Cloud - 3-5 years is a long time and we need to continue moving forward as we can. Look at BC products individually, is it worth the time invested to adopt.

Cloudsource OA - Does need BC as starting point - Sirsi Product. Initial look at it and it is currently only in pilot. Discussion at Exec upcoming. Not one to rule out.

CloudSource OA demo is available on Sirsi support if anyone has interest and pass feedback along

**8. UAL ILS Team updates** Elaine Coupland (University of Alberta)

- a. Jim is retiring at end of November

- b. Working with other staff to fill gaps, but Jim's position will not be filled as currently exists
- c. Next few months focus will be on maintaining what we have
- d. UA is undergoing huge restructuring, including IT - hopefully know the full impact by the end of calendar year.
- e. Support for consortium is being factored into this, but what changes will look like overall is unclear
- f. Between now and next summer not much capacity for new implementations (ex BlueCloud OA)
- g. Side note: Symphony Web update is being worked on and planned for next few weeks.
- h. Please reach out with questions and concerns
- i. Q (Gisele): Will NEOS Decolonizing Description work be able to move forward
- j. A: Brain and Jim have worked out a process/script for adding terms into catalogue
- k. Brian: Clarification - Good chunk of way done, but ticket in with him related to legacy LCSH that we don't want to display.
- l. Clarification - Prioritization work at UAL has been discussed and balance between wrapping up and sustainability (Ex Decol, MARCIT)

**9. Alberta Government Library:** University of Alberta

- a. Status in UABusiness library in Symphony
  - i. UABusiness being used as holding location for AGL MARC
- b. Update on plans at UAL
  - i. Currently approx 30,000 items on pallets on 4th floor Cameron Library. UAL plans to send the majority to RCRF and generally treat material as a large last copy ingest.
- c. Barcode range for AGL and processing considerations
  - i. How are others approaching this? Can we clear the barcode range from future use and then reuse them
  - ii. No substantive feedback on best practice. There was a suggestion to confirm whether barcodes from AGL include library text stamp.
  - iii. Would UA Access services have further insight?
  - iv. May be safest to replace barcodes anyway.
- d. Updates from other NEOS members on retentions from AGL
  - i. Others have materials and have yet to unbox/integrate with collections
- e. Tara - RDP - have material, also sitting in boxes
- f. Gisele - 12 items
- g. Taras - 332 items
- h. Elaine - Will edit UABusiness so that libraries can change owning library themselves
  - i. Elaine changed the permissions during the call
- i. UAL can change lists in bulk, but it would be a chargeable action (prob. Approx half hour job)
- j. Myrna confirmed that Global Editor can change library by wandling barcodes once permissions are updated.
- k. Regarding barcodes - Myrna asked about library name on barcode and whether access services would have any guidance?
- l. Others interested to learn more as well about barcode issue

**10. Linked Data Implementation Plan:** Ian Bigelow (University of Alberta)

- a. Introduction/High level overview (5 min)
  - i. *This is an update to a degree - I had initially hoped to tie in something on this at the NEOS-Mini conference, but lots has been going on and the document needed further review and attention at the Strategic Leadership Team and Library Operations Team*
  - ii. *But what is LDIP - It is a plan to chart a path forward for LD implementation over the next 5 years.*
  - iii. *LD has been a strategic priority for UAL for a while, but recent events further emphasized the need for long term planning to scope work and required resources*
  - iv. *Also, with the direction to focus on implementation it is clear that this is not a project for CatMet alone. There are clear implications for other units and systems at UAL, and for participation with partner institutions. In this sense LDIP is a key planning and communication tool.*
- b. Implications for NEOS and NEOS-Tech and questions (5 min)
  - i. Next steps
    1. Further discussion at next meeting
    2. Sharon Farnel and Ian Bigelow to work on presentation on LDIP for NEOS
  - ii. *Implications: for now I wanted to get this to everyone's attention, though it may be worth specific reflection on 2.3 of the document and data aspects related*
    1. *Beyond that I think this should be a standing agenda item for updates at NEOS-Tech to allow for updates, further questions, and discussion*
    2. *+I plan to work with Sharon Farnel on a more detailed presentation about the plan (probably one for UAL and one for NEOS)*
- c. Related recent developments
  - i. UAL and Share-VDE have just signed a 5 year MoU for continued collaboration to support LDIP. *This is important as you will see Share-VDE come up throughout the plan for Cataloguing projects*
  - ii. Share-VDE Portal version 2.0 Beta has launched with Stanford data
    1. *UAL and NEOS data will follow with other institutions some time in the new year 2022 after the Stanford data is used to further refine the Beta*
  - iii. Current development cycle for LD4P3 is focusing on ILS middleware with prototyping of tooling to connect Sinopia to Sirsi Symphony
    1. *Of key importance for cataloguing workflows - create in Sinopia, but also support data in Symphony*

**11. NEOS Decolonizing Description Working Group Update:** Brian Stearns (University of Alberta), Gisele Ramgoolam (NorQuest College), Anne Carr-Wiggin (NEOS Manager)

- UA student (Eden) continuing to work PT until winter break to use up hours (Going through groups and checking names)
- Identifying and working through other subject terms
- A smaller group within the working group is working with Eden to help them with questions and decisions about subject headings.

- on technical side, good progress so that system (Jim's process) local authority records can find all bib records that should be updated, add in local term and any subdivisions from LC subject headings
- What still needs work: Cree Indians (et cetera) convert to 694 and index so that if someone searches they can find the record, but not see it
- Gisele - Anxious to see work in the system and happy to hear about progress and that it continues to be a priority.
- Ian: Question about discovery environments and usage
- Perhaps connection needed with NEOS Discovery and DOT
- Brian: Also question about how to share data with other institutions, OCLC, et cetera
- 600 #7 source code CISH - Canadian Indigenous Subject Headings for MARC
- Susan - For discovery, what can we expect beyond clickable links?

### **12. NEOS Continuing Resources Working Group Update and 866|8 usage in Summary Holding Records**

- : Abigail Sparling (University of Alberta)
- Drafts for each area complete (Bibliographic records, Summary Holding Records and Serial Controls) ; working group currently refining and will then bring back to next NEOS-Tech
- 866|8 textual holdings field to specify format of holding statement
- All NEOS holdings are in textual summary statement (866|a)
- UAL creating LHR in OCLC and need to code 866|8 for all physical format serials (electronic resources may be excluded)
- Should usage of 866|8 be dictated, or as guidance, namely that if you use that field, use it that way. Is it a mandatory field, or guidance on usage?
- Confirmation - Only necessary for print for UA, largely for ILL use cases in OCLC
- When UAL applies this, do others want to have it applied as well across NEOS?
- Plan for now will be to provide guidance on field usage, but not mandate
- Confirmation that this change will be an automated process

### **13. University of Alberta Library MARCIt Process Update:** Abigail Sparling (University of Alberta)

- Implementing in the next two weeks
- Changes to expect: More e-journal records in the catalogue, no 856|3 coverage information or summary holdings for UAL e-journals linked through SFX
- Meeting scheduled with Macewan to coordinate MARCIt loads

### **14. NEOS Discovery Committee, update on work** (5 mins)

- Last meeting July 6 and in exploration stage
- Urgency has been reduced knowing that NEOS can continue to use the NEOS Blacklight platform
- Blue sky wish list being developed
- Next meeting Nov 16.

### **15. Information item:** (Tara Gunsch) What was Red Deer College (RDC) is now renamed Red Deer Polytechnic (RDP). RDP is currently going through related steps to transition to the new name.

### **16. Local MARC fields review,** for information: Amanda Nagyl (University of Alberta)

Feedback has been received in response to a solicitation on the listserv. Follow-up has been delayed due to competing work priorities.

**13. Standing Agenda Item: Committee documentation: All**

**14. Minute Taker at Next Meeting:** Lakeland College