

# Technical Services Interest Meeting Minutes

**Tuesday, June 10, 2025 9:30 AM to 10:30 AM**

## Agenda Items

**Evergreen Upgrade Update:** The upgrade was generally smooth, though a few users reported problems with column displays that required adjustments and issues accessing reports outputs.

- **Evergreen Report Access Issues:** Lindsay discussed issues with accessing report outputs in the Evergreen system, where library staff reported sporadic problems with login loops despite being already authenticated. Lindsay explained that the problem was more frequent when accessing reports from email notifications and could be worked around by copying URLs and pasting them into active Evergreen sessions. On Wednesday, 6/11/25, Lindsay sent an email with the following information:

"We have received several reports of staff not being able to access or download report output, because Evergreen asks for a login, but staff login credentials are not accepted resulting in an endless loop of the login prompt.

There is an existing bug report that states "When a staff account is created or given permissions to access the reporter for the first time they have to enter their credentials again to view the html output of a report. Once they have done that once, the report outputs will open as expected on future access attempts."

However, our staff accounts are existing accounts and have always had report permissions and are reporting:

1. The login prompt is triggered when following the URL in an email notification
2. The login prompt is triggered by clicking any of the output formats from the Output folder
3. The login prompt \*seems\* to be related to the shared output of the Purchase Alert, which was created by WLS staff and shared to all member libraries
4. Login credentials are not accepted

I have an open help ticket with our ILS vendor support to work on figuring this out. In the meantime, please let me know:

1. Have you been able to access and download \*any\* report output, **without triggering the login**? If so -
    1. Was the output from a shared folder?
    2. What is the folder name?
    3. Who owns it?
    4. What is the report name?
  2. If you have triggered the second login -
    1. Were your credentials accepted?
    2. What output were you opening?
    3. Was the output shared, or your own report?
  3. What browser were you using?"
- **Evergreen Columns:** "When managing columns, it makes it hard to find a certain column heading when they are not listed in alphabetical order. Can the columns on each of the Evergreen screens be given an option to sort, when managing those columns?" Lindsay and Allison discussed how the column list has expanded in some interfaces, making it challenging for new users due to varying terminology. They noted that cleanup efforts are ongoing, and users can find help in available cheat sheets. [Check out the Updated Column Cheat Sheet here!](#)
  - **Evergreen Overdue Item Highlighting Updates:** From the upgrade, there are changes to the Overdue Item highlighting in Evergreen, where overdue items in the patron record now show a peach background for title and barcode fields, with gray backgrounds for the rest of the row. Lindsay explained that the default sort order is by checkout date, and while the highlighting system is different from previous versions, it's part of broader accessibility improvements.

**Evergreen Community Mailing Lists:** Lindsay and Allison recommend/encourage staff to get involved in the Evergreen community discussions, noting that technical expertise isn't required, and frontline staff's feedback is valuable for the open-source project. Recommended lists to get started on are:

- **Evergreen General Discussion List:** This is the general-topic, (usually) non-technical list for the Evergreen community — Evergreen users, librarians, library workers, library users, developers, fellow travelers, or people just plain curious about Evergreen. As of October, 2008, this list had over 500 members. Its traffic is moderate. To subscribe to the

Evergreen general discussion list, go to

<https://list.evergreen-ils.org/mailman3/lists/evergreen-general.list.evergreen-ils.org/>

- **Note:** There is ongoing maintenance on the web interface so if you want to subscribe you can use email. Email [evergreen-general@list.evergreen-ils.org](mailto:evergreen-general@list.evergreen-ils.org) with Subject: subscribe
- **Evergreen Cataloging List:** This list is for technical services staff using the Evergreen ILS and is for discussion on all technical services issues, particularly related to cataloging, acquisitions, and serials. Discussions include general technical services questions, workflows, bugs, and coordinating future development of these areas. To subscribe, go to <https://list.evergreen-ils.org/mailman3/lists/evergreen-catalogers.list.evergreen-ils.org/>
  - **Note:** There is ongoing maintenance on the web interface so if you want to subscribe you can use email. Email [evergreen-catalogers@list.evergreen-ils.org](mailto:evergreen-catalogers@list.evergreen-ils.org) with Subject: subscribe
- **Evergreen Circulation List:** This list is for circulation staff and administrators using the Evergreen ILS and is for discussion on all issues involving the use, setup, and management of circulation using Evergreen. Discussions include general questions, workflows, bugs, and coordinating future development of these areas. To subscribe, go to <https://list.evergreen-ils.org/mailman3/lists/evergreen-circ.list.evergreen-ils.org/>
  - **Note:** There is ongoing maintenance on the web interface so if you want to subscribe you can use email. Email [evergreen-circ@list.evergreen-ils.org](mailto:evergreen-circ@list.evergreen-ils.org) with Subject: subscribe

**Questions about Hold Queue Position:** There was a question submitted about queue position. Allison explained that queue positions can vary depending on the pickup location and recommended checking the system-level view for accurate positions. Lindsay added that a bug in version 3.13 affects how holds are displayed, showing all as position one, and mentioned that a fix is planned for version 3.15, likely to be backported to earlier versions.

**Evergreen Printing Challenges:** A question was submitted about printing issues coming up in the Chrome Browser: *"Is anyone having trouble with the Google print interface and the receipt printer's paper size, is anyone else having trouble? (for example you want to print the Holds List on letter size paper, and then switch back to the receipt printer, the Chrome browser does not auto-select the correct paper size for the receipt printer and you have to manually select the paper size. This is only a Chrome issue, we have no printer problems in Firefox or Edge.)"* Allison and Lindsay recommend that anyone having issues printing from Evergreen in the Chrome browser to switch to using the Edge or Firefox browsers, which work well with

Evergreen. The discussion also covered printing spine labels, with Allison providing guidance on using the actions menu and templates in Evergreen.

**Cataloging Overview Session - In-person at WLS:** The cataloging department, represented by Doug Wray and Melissa Glazer, announced an upcoming cataloging overview session scheduled for 9 AM at WLS, which would focus on explaining their services and addressing questions from newer staff members. [Register here](#).

- Doug and Melissa also encouraged staff to call the WLS Cataloging Department 914-231-3243, or email them at [wls-cat@wlsmail.org](mailto:wls-cat@wlsmail.org)

**Tech Services Interest Meeting Schedule:** The tech services interest meeting decided to continue meeting every other month, with the next meeting scheduled for August 12th. Allison announced she will be creating an email list for the group and encouraged participants to send meeting topics to the help desk.

The meeting concluded at 10:11 AM.