Technical Services Interest Meeting Minutes

Tuesday, December 9, 2025 9:30 AM to 10:30 AM

Circulation Statistics & Deleted Items: Circulation statistics for deleted items remain available in Monthly circulation reports, Annual reports, and Custom circulation-related reports.

- Deleted items **do not appear** in shelf lists–based reports (which reflect items currently on shelves). For example, deleted copies will not appear in shelf lists, but their historical circulation data still counts in circulation reports.

Evergreen 3.15 Update – Required Fields & Deposit Field Concerns: Evergreen version 3.15 will add **asterisks to required fields** in the holdings editor.

- The **deposit field** may become required for libraries that use required fields. Concerns were raised about accidental deposit values being entered, which can automatically create charges on patron accounts and block patron accounts unintentionally.

Follow-up from Lindsay: Following up on the discussion about changes to the Holdings Editor in 3.15 (to which we will be migrating in 2026) the Holdings Editor has been rewritten in Angular (a web application framework). The basis of this work was a project to improve item notes, alerts, and tags, but involved changing the entire layout, table layout, etc.:

- The question was raised about required fields, that they are now indicated by asterisks, and that the Deposit and Deposit Amount fields appear to be required.

- I haven't (yet) found information specifically addressing required fields, but they do appear to be indicated by asterisks. The deposit fields have been renamed – "Is Deposit Required?" and "Deposit Amount", and also appear to be required, **but they now have default values "No" and "$0.00".** Hiding these fields still allows a new item record to be saved.

#	Location	Call Number / Item Notes	Barcode	Shelving Location	Circulation Modifier	Active/Create Date	Holdable?	Status	Due Date
1	BR1	M1040.B22 C6 Edit	test1234567 View | Edit	Stacks		12/10/25	Item Hold Call Number Hold	In process	
2	BR1	M1040.B22 C6 Edit	test12345678910 11 View | Edit	Display		12/10/25	No	In process	

- [Screenshots are from a community test server.]

● Further investigation into globally hiding item attributes is still needed.

Hiding Un-used Attribute Fields: Item attributes (including the deposit field) can currently be hidden **locally by workstation**, not system-wide, in the preferences tab in the linking/editing interface. Note: Hidden fields do **not** carry over to the Holdings Template Editor.

● Global field hiding is theoretically possible but currently unreliable; Lindsay is investigating. Several Evergreen bug tickets exist addressing these limitations; progress is being monitored.

MARC Records Missing Subject/Genre Tags (650/655): Some records lack subject and genre data, impacting Aspen Discovery reading lists and subject browsing.

● This is common with **vendor-provided** or **acquisitions-generated brief records**, especially from Ingram.

● WLS Cataloging Guidance: Requests for record enhancements should be emailed to **WLS-CAT@wlsmail.org**

  ○ Include author, title, and ISBN (or TCN where available). Attachments are **discouraged** for cybersecurity reasons.

● A GREAT Recommendation from Laura: Use RecordBuckets, shared with cataloging staff, for bulk corrections (e.g., genre projects). Record buckets can be used to share multiple problematic records directly with cataloging staff.

  ○ Buckets Require an existing record

  ○ Can be shared for easier access

  ○ Recent interface updates have made buckets more user-friendly.

- Allison Pryor has scheduled a training session for Evergreen Buckets on Wednesday, January 14, from 10:00 AM to 11:00 AM. [Register on LibCal!](#)

Evergreen Acquisitions – Invoice Issues: Some invoices remain open in Evergreen when shipments are canceled or lost after invoicing.

- Lindsay will investigate whether recent acquisitions updates address this issue.

Dewey VS. Generic Classification: Shane asked what the best practices were when it came to choosing which classification to use when linking.

Follow-up from Lindsay: To my knowledge, the classification scheme set at the volume/call number level in individual holdings records has no particular relevance in Evergreen or to reporting. It is not used by WLS for any of the standard monthly circ or Annual Report reports. I think it is just informational or library preference.

- In this example, the Classification is set as Dewey, but the Call Number Label entered is technically Generic. This does not impact catalog display in either the staff or public catalogs, searchability, or any reporting.

- At a system level, we have our default classification scheme set to Dewey, which controls the display of the Bib Call # in catalog records:

Record Summary 📖 Book

Title: Demon Copperhead : a novel

Author: Kingsolver, Barbara

Bib Call #: 813/.54

- Since the bib MARC records typically have multiple call number fields:

```
050 14 ‡a PS3561.I496 ‡b D46 2022
082 04 ‡a 813/.54 ‡2 23/eng/20220920
```

- But again, this affects display and is generally informational.

Evergreen System Issues: Evergreen issues experienced the previous day (Monday 12/8) that were affecting libraries with very slow response times and white screens due to a cache issue. Lindsay had sent out multiple emails with updates and instructions:

- It started with heavy bot traffic on one of the Evergreen servers - our ILS vendor support restarted the problem server, which resolved the traffic issue. However, bad data had been cached, and Evergreen data tends to be sticky. How many staff use Evergreen also compounds cache issues. This includes - having multiple tabs open, leaving tabs open for a long period of time, and logging in to a browser profile and synching data which is saved to the profile. Because of this, cache clearing may need to be done more than once. I have also discovered that there seem to have been changes in how synched profile data is managed, at least in Chrome, that seem likely to be making these types of situations worse.

- If you are still having problems, these are my recommendations:

  ○ Close all open browser tabs but one

- Close any other open browser windows

- Clear the cache using the browser options menu > Delete browsing data option (information about the data types in Chrome)

- Sign out of Chrome

- Close the browser window

- Open a new browser window, sign in to Chrome

- You may need to repeat these steps more than once.

Evergreen Community & Listserv Workshop Training: Lindsay will be scheduling a workshop sometime in January that will outline how library staff can get more involved with the Evergreen Community listservs, Bug tickets and tracking in Launchpad, and Community participation and testing. More information to come!