

February Tech. Services Interest Group Meeting Minutes

February 10, 2026 9:30 AM to 10:30 AM

Reminders/Demos/Updates:

TSIG Email Group: The TSIG officially has an email group: tech-services@wlsmail.org. Staff should email the help desk (support@wlsmail.org) if they would like a colleague to be added.

Evergreen Training: Lindsay Stratton is hosting a **Getting Started with the Evergreen Community** training. The session will focus on Evergreen community resources, including documentation, list-servs, interest group meetings, the bug reporting system, and ways to learn more about or contribute to Evergreen.

- The training is scheduled for **Wednesday, February 15, 1:30 PM – 3:00 PM**.
- Register [here!](#)

Pre-Cat Items and Ongoing Maintenance: A question was raised about disabling the pre-cat feature at checkout due to staff confusion when pre-cat records remain in the catalog. It's unlikely to be disabled, as it remains necessary when a barcode cannot be read properly.

- **Remember to re-scan items *BEFORE*** creating a pre-cat record, as scanners may not always capture the full barcode on the first attempt.
- Pre-cat records should only be created as a last resort and must include the title, barcode (if available), ISBN, and author.

When pre-cat items are returned, Technical Services staff ***must*** delete the records from the catalog.

- Records can be located by searching “-1” in the TCN query, or by using reports.

- In the Evergreen Reporter shared templates folder, libraries can clone the “Pre-cat Titles” template.
 - **Shared Templates** → **evergreen.reports** → **Collections** → **Item Maintenance** → “Pre-cat Titles”.
- Laura (Greenburgh) shared that she runs this report on a recurring schedule and receives the results via email, allowing for regular cleanup. After an initial large cleanup, ongoing maintenance is minimal.
 - Recurring reports are also useful for tracking other areas such as missing items, lost items, items with deposit amounts, and long-transit items.
- Everyone is encouraged to submit a help desk ticket (support@wlsmail.org) if unsure about corrections or transfers.

Allison will update the **Evergreen Maintenance page on the IT Wiki** to include information on pre-cat maintenance and other recommended reports.

Discussion and Q&A:

Ingram

Pre-Publication (Street) Dates: Shane (Chappaqua) asked how libraries identify pre-pub dates, as packing slips do not include this information.

- Lauren (White Plains) explained that after increased demand, Ingram automated its packing process, reducing visibility of street dates on invoices and boxes. Dates can now only be found on the packing slips.
- White Plains adjusted workflows to check packing slips during unpacking, and Lauren encouraged libraries to raise concerns with Ingram to prompt improvements.

Multiple Shipments and Invoices: Lauren (White Plains) reported receiving multiple shipments and separate invoices for the same order, which has increased staff workload.

- Marianne (Ardsley) and Kharin (Warner) confirmed similar experiences, noting that Ingram's use of multiple warehouses results in split shipments, multiple packing slips, and invoice discrepancies.
- Ingram account representatives have recently changed (now Kevin and Harley), and libraries may not have been formally notified.

It was discussed whether Ingram could separate shipments by genre, but Lauren noted this is not currently available.

- Ken shared that his library maintains separate Ingram accounts for juvenile and adult materials.
- Laura (Greenburgh) added that other vendors, including Brodart, also maintain separate accounts by age designation, which helps with processing.
- It was agreed that separate accounts might reduce the sorting issue.

Lindsay also noted that White Plains may be uniquely affected due to its use of Acquisitions and PO workflows, but the shipment and invoicing issues appear widespread.

On-Order MARC Records: Libraries beginning work with new vendors must coordinate with **WLS Cataloging** to ensure MARC records are properly set up, retrieved, and imported.

- Communication with both the vendor ***and*** WLS Cataloging is required even if Acquisitions is not used.
- Vendor MARC records may arrive via email or FTP, so libraries should confirm workflows in advance.

Follett and Other Vendors: Follett has reached out to several libraries and appears better organized following the Baker & Taylor disruption. They offer a free ordering platform similar to TS360, focusing on J/YA materials, and provide MARC records via email.

- Libraries should consult with WLS Cataloging on how to submit these records.

- Several libraries are exploring Libraria, which primarily supports Juvenile and YA material.
- Brodart has been reported as seamless for invoicing, street dates, and MARC records, and accessibility may improve if the minimum order requirements get decreased.

Evergreen Cookies and Browser Cache: Allison Pryor and Lindsay Stratton were asked to discuss best practices regarding browser cookies in Evergreen.

Do NOT delete cookies when clearing the cache, as cookies store workstation settings, user preferences, templates, and passwords.

- If cookies are accidentally deleted, you may be prompted to re-register your workstation, which restores all saved settings (Search settings, columns, templates, and receipts). Some settings are stored locally in the browser, while others are saved on Evergreen servers.
 - A “tell” that you deleted your cookies besides re-registering your workstation, is not recognizing your saved columns. Or having different receipts and templates than what you’re used to.
- Clearing cookies should generally only be done in extreme cases, such as after major upgrades or system-wide issues preventing basic functionality.
- Deleting cookies is inconvenient but not the end of the world!

Next Tech Services Interest Group Meeting: April 14, 2026.