

Technical Services Interest Meeting Minutes Tuesday, April 14, 2026 9:30 AM to 10:30 AM

Updates/Reminders/Demos

Evergreen Upgrade: The annual Evergreen upgrade is happening Wednesday night (5/13). On Thursday morning (5/14), staff will need to clear their browser cache before signing into Evergen.

- To clear the cache, go into the browser's history. Before you delete:
 - **DESELECT** the cookies options! (If you leave this selected, this will prompt you to re-register your workstation.)
 - Make sure to have *Clear cached images and files* turned on. (Okay to have other options turned on - except for "Cookies and other site data")
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New Evergreen Upgrade Features:

- Hold Shelf: Clear These Holds button will be removed.
- Queue Position: The bug affecting the queue position displaying as #1 is now fixed! And there are two new queue position columns that will be available in the patron's record!
 - 1. Global Queue Position: patron's place in the queue compared to the Whole System.
 - 2. Relative Queue Position: Patron's place in the queue for the Pick-up Library.
 - Note: We're still investigating which queue position option will display in the OPAC.
- Patron Alerts: Now sorted by date order.
- Claims Returned: Claims Returned Items will not be separated/removed from the patrons account once that item gets checked out to someone else.
- Email Notices: HTML is now integrated into email notices, which will allow for additional customization.
- Patron Statistical Categories: patron stat. Cats. can now be deleted.

All upgrade features are live on the Evergreen Test Server:

<https://wls-test.sequoia.evergreencatalog.com/>

(Log in with your Evergreen username and password.)

Reminder:

- Book vendor discussion with Doug Wray at the next Adult Services meeting - May 7, 2026 . [Register on LibCal](#).

Discussions

Parts on Items: Parts are used to indicate individual components of a multi-volume set.

Using the parts feature incorrectly can interfere with how items fill holds.

- When to use the Parts feature: Indicate different parts/volumes that are linked to the same Title Record.
 - Example: Encyclopedia of philosophy (TCN: 3225273)
- When **NOT** to use the Parts feature: Indicate what # a title is in a series if that information is included in the Title Record.
 - Example: Absolute Batman 2 Abomination (TCN: 5403317)

Editing Items via Holdings Editor vs. Items Status/Actions menu: When updating a status to Missing or Damaged, it does not matter if it's updated directly in the Holding Editor or through the Actions menu.

- The most important factor is that we **cannot** edit or update statuses if the item is Checked Out, Lost, or In Transit.
- There are permissions in Evergreen that are *supposed* to prevent editing other libraries' item statuses.

Follow-up about Ingram invoicing: Allison asked the group if invoicing has gotten any better/easier with ordering from Ingram, and the take-away was that it hasn't gotten better.

- Lauren from WHI mentioned that street dates are being included/more visible than they were before.

Suggestions for Tech. Services Help Guides: Allison asked the group what they would like to see added to the IT Wiki help guides. Lauren suggested recommended reports to run for item maintenance.

- Report Templates to CLONE that could be helpful in the meantime:
 - Evergreen.reports > Collections > Item Maintenance > *Deleted Items List*
 - Evergreen.reports > Collections > Item Maintenance > *Items Missing Price Data*
 - Evergreen.reports > Collections > Item Maintenance > *List Items by Item Status*
 - Evergreen.reports > Collections > Item Maintenance > *Lost and Lost and Paid Items with Title Details*
 - Evergreen.reports > Collections > Item Maintenance > *Missing Items List*
 - Evergreen.reports > Collections > Item Maintenance > *Pre-cat Titles*
 - Evergreen.reports > Collections > Item Maintenance > *Unknown Stat Cat Items*

Q&A

Q: How long until missing items are removed from Evergreen?

A: 1 year!

Q: (Paraphrased) We had an item get returned with a barcode, but when we scanned it - the barcode wasn't recognized/deleted in Evergreen. When/why would that happen?

A: A few things could have happened, but essentially - Evergreen won't delete an item's barcode if it's still checked out/marked lost. It's possible that the item didn't get scanned at checkout, and was marked missing and then deleted.

Q: When should we mark items Missing vs. Lost?

A: Items should only be marked lost when they are checked out to a patron/on a patron's record and cannot be found. Items should be marked missing when they can't be found on the shelves.

The next TSIG meeting is Tuesday, June 6, 2026 at 9:30 am.