

Discussion Summary

**Evergreen Cataloging Interest Group
Community Gathering
Hackfest 2025**

**May 15, 2025
12:45 pm (EDT)**

[Cat IG Wiki](#)

Organizing Committee:

- Kate Coleman, Jefferson County Library (MO)
- Tiffany Little, PINES (GA)
- Mary Llewellyn, Bibliomation (CT)
- Andrea Buntz Neiman, Equinox
- Kathryn Nesbit, Forsyth County Library (NC)
- Elizabeth Thomsen, NOBLE (MA)
- Carol Witt, C/W MARS (MA)
- Jennifer Weston, Equinox -- Facilitator
- Galen Charlton, Equinox – Advisor

Retired Members:

- Elaine Hardy, *Retired from PINES (GA)*
- Janet Schrader, *Retired from C/W MARS (MA)*

DISCUSSION NOTES

(See [Chat Notes](#) on separate document tab)

I. General

- Meeting Frequency?
 - Discussed alternative frequency of meetings to not meet monthly
 - Considerations:
 - More Interest Groups now – hard for people to attend all the meetings
 - Takes time to prepare for each one – some meetings are more useful than others
 - Work with other Interest Groups to combine presentations / discussion topics
 - Perhaps quarterly
 - Topic and goals would need to be planned & promoted in advance
 - People are more likely to attend when presentations are planned - but that is unlikely to be sustainable from planning perspective each month
 - Consider every other month presentation schedule
 - Jennifer will send inquiry to Cat Listserv for more opinions
 - Organizing Committee will meet soon (probably June)
 - Jennifer will coordinate with other IG Leaders to brainstorm ideas
 - Will have regular June meeting - Tues, June 10 @ 2pm (ET)

II. Wishlist Items

- Introducing - *Sympathetic Heat!*
 - Add heat to a bug even if it doesn't affect your workflow bc it's important to others
- Granular permissions

- Limit to only be able to change: shelving location / circ mod - similar to item barcode
- **Wishlist bug: More granular permissions for the Holdings Editor**
 - bugs.launchpad.net/evergreen/+bug/2100324
 - Please add any comments/heat!
 - Susan added notes to the LP bug with ideas from today's discussion.
 - Item Status/Holdings View menu option for "Change Shelving Location" tied to granular perm that opened in a little window for this purpose
 - Similar - have item status, shelving loc, and circ mod able to be changed individually like the Replace Barcode functionality
 - See next/related bug topic for Item Status considerations
- Item Status Quick Change
 - **Bug: Update item status from Check In / Item Status window**
 - <https://bugs.launchpad.net/evergreen/+bug/1862982>
 - **Wishlist bug: Ability to customize statuses in "Mark Item As" Action menu**
 - <https://bugs.launchpad.net/evergreen/+bug/1994694>
 - Considerations:
 - Jennifer Pringle - I think we need an angular item status before we can add individual pop ups for these attributes - Evergreen has two different pop ups for replace barcode right now (angular versus angularjs)
 - Could this be anticipated as part of Angular Circ?
 - Unknown – needs discussion
- MARC Tag permissions
 - Equivalent of a tag table to assign what tags should be read only
 - Use permissions to limit who/what can be edited otherwise
 - Customizable by library consortium (not just default values)
- Instead of YAOUS, we can say YAP!
- Call Number Prefix Utilization
 - A case of folks wanting different things is a question Mary sent to the listserv back in January. She wants the Call Number Prefix to figure into the shelf browse, while some libraries use it as is and would not want that.
- Tab Opening Behavior
 - As a new user of Evergreen, is there a specific reason why a different tab opens for editing items or adding holdings rather than using the same window/tab? I find myself with a lot of open tabs when adding items if I am not intentional about closing each tab as I go.
 - We noticed that if you don't have your redirects set up in your browser your experience is very different to someone who does — Check your browser settings

III. Planning Ahead

- Celebrate Angular Buckets! (available in 3.14)
 - Share – How are we using them?
 - Any wishlist / bugs to bring to the group?
- Focus on Documentation:
 - Enhanced Marc Editor is not yet documented
 - Concerns about number related open bugs needing resolution
 - Needs additional testing & discussion
 - BCLC / Jennifer Pringle – written some 3.14 but I could definitely have missed things
 - docs.libraries.coop/sitka/_enhanced_marc_editor.html
 - Great starting place! Needs review
- Cat IG Meeting Topics
 - Organizing Committee meeting soon to start planning for the rest of the year
- Planning for 2026 Conference
 - Goal 1: Useful sessions – planned well in advance
 - Goal 2: Variety of session with time for hands-on workshop type experiences
- Future Discussion / Presentation Topics
 - Kate is learning everything about MarcEdit (Library Juice Academy)
 - Regular Expressions – Libby

MARC Edit and related workflows – Program Ideas:

Marc Edit Feasibility Study

- Just the pieces that we use – just the editing/validating pieces

MARC Batch Edit Feature

- Tasks
- Segments

Call for Shared MarcEdit task lists — share (add to Wiki)

Libby McLean - I shared my Regular Expressions in the Regular Expression Store in MarcEdit--prefixed EVG

Chat Notes

Jennifer Weston

-

Organiser

-

12:38

Cataloging Interest Group will meet at 12:45

Jennifer Weston

-

Organiser

-

12:47

Notes document:

docs.google.com/document/d/1SG6UShQTtwDpQ71ztCSduyPbBFHDRpATilnirifZ9ro/edit?usp=sharing

Britta Dorsey

-

12:47

My brain is working better than expected

Britta Dorsey

-

12:47

lol

Johnathon Redmon

-

12:48

I had a question because of a recent problem. Why do CAT1 not have permission to change shelving locations in Evergreen? I had to get ADMIN help. But whenever we have a shelving project I'm obviously heavily involved, so this is a bit inconvenient.

Mark Lee

-

12:48

Nothing to see here

Britta Dorsey

-

12:50

Johnathon, that's a consortium decision that we can talk about in the Cataloging Committee.

Britta Dorsey

-

12:50

Permissions are crazy

Elizabeth Davis

-

Organiser

-

12:50

We would love that

Kate Coleman

-

Organiser

-

12:51

Permissions ARE crazy. Jennifer's been working with our consortium for a perms overhaul for months and months and months now!

Elizabeth Davis

-

Organiser

-

12:51

Also one to update just the circ mod

Susan Morrison

-

Organiser

-

12:51

Came in a little late, but yes, permissions...

Carol Witt

-

12:51

docs.google.com/document/d/1SG6USHQTwDpQ71ztCSduyPbBFHDRpATilnirifZ9ro/edit?tab=t.0

Susan Morrison

-

Organiser

-

12:52

Here's a wishlist bug for more granular permissions in the holdings editor - please add any comments/heat!
bugs.launchpad.net/evergreen/+bug/2100324

Kathryn Riedener

-

12:52

that would be awesome!

Britta Dorsey

-

12:52

Instead of YAOUS, we can say YAP

Mary Llewellyn

-

12:52

tag permissions!!!

Kate Coleman

-

Organiser

-

12:53

I heard the best term yesterday. "sympathetic heat" Add heat to a bug even if it doesn't affect your workflow bc it's important to others

Tiffany Little

-

12:54

I love that term too, Kate! I can tell it would be good for the software/community but it doesn't currently affect me right now

Jennifer Pringle

-

Organiser

-

12:54

the bug is tagged needsdiscussion - is it one to talk about further today or at a future meeting so we can get that tag removed and get is moved forward?

Kate Coleman

-

Organiser

-

12:55

You do have to join stage to use your mic

Mary Llewellyn

-

12:56

MARC tag permission

Tiffany Little

-

12:56

I wonder if it would be easier (?) if there was an Item Status/Holdings View menu option for "Change Shelving Location" tied to the granular perm that just opened a little window that has a field to change the shelving location

Tiffany Little

-

12:56

Rather than trying to teach Holdings View to respect all those perms

Mary Llewellyn

-

12:57

we had that once upon a time in a previous system

Tiffany Little

-

12:57

So each menu item only looks at one perm rather than Holdings Editor looking at all of them

Kathryn Riedener

-

12:57

I would love for our libraries to be able to add the physical description to a MARC record if it is missing (and NOTHING ELSE!)

Susan Morrison

-

Organiser

-

12:57

We discussed it would be nice if they could be like Replace Barcode.

Mary Llewellyn

-

12:57

we let them for instance, change the 300 on CIP records, but not the 245

Jennifer Pringle

-

Organiser

-

12:57

I think you'd want the same thing for item status and circ modifier

Elizabeth Davis

-

Organiser

-

12:59

bugs.launchpad.net/evergreen/+bug/1862982

Chrisy Schroth

-

12:59

A case of folks wanting different things is a question Mary sent to the listserv back in January. She wants the Call Number Prefix to figure into the shelf browse, while our library uses it as is and would not want that.

Mark Lee

-

12:59

many of these both interest me and concern me for our specific context

Elizabeth Davis

-

Organiser

-

12:59

bugs.launchpad.net/evergreen/+bug/1994694

Tiffany Little

-

13:01

Oh, that's interesting

Sarah Childs

-

13:01

Oh, I would like Call Number prefix to figure into shelf browse, too.

Jennifer Pringle

-

Organiser

-

13:02

I think we need an angular item status before we can add individual pop ups for these attributes - Evergreen has two different pop ups for replace barcode right now (angular versus angularjs)

Jennifer Pringle

-

Organiser

-

13:02

bugs.launchpad.net/evergreen/+bug/1936233

Chrisy Schroth

-

13:03

We use unique call numbers for adult items, so we don't want to look in several different places to see if that call number/cutter combination has been used already

Tiffany Little

-

13:03

Ooh, so it's essentially done? Oh wait, it needs testing still. Sad face

Chrisy Schroth

-

13:05

we'd have to look in R, LT, K (local history), we have 10 Prefixes we used currently.

Tiffany Little

-

13:05

I don't think so, but I could be wrong

Jennifer Pringle

-

Organiser

-

13:05
same thing if we want to add things to the Check In screen - since it's still angularjs

Tiffany Little

-

13:06
I guess that's me hah

Tiffany Little

-

13:06
Stephanie is assigned to the Port Item Status bug, so maybe she's working on rebasing it since the branch is older

Jennifer Pringle

-

Organiser

-

13:07
she mentioned it during her lightning talk

Tiffany Little

-

13:07
Well there we go haha

Tiffany Little

-

13:07
Item Status

Elizabeth Davis

-

Organiser

-

13:07
but that bug was updated in 3.8

P

Jennifer Pringle

-

Organiser

-

13:10

this is our most perplexing enhanced marc editor bug - bugs.launchpad.net/evergreen/+bug/2107346

Jennifer Pringle

-

Organiser

-

13:10

I can't replicate but my libraries can demonstrate

Kate Coleman

-

Organiser

-

13:11

This is a bug I've wanted for years. bugs.launchpad.net/evergreen/+bug/1779319

Madison Kochel

-

13:12

I like that alerts, notes, tags, stat cats are at the bottom now

Mark Lee

-

13:12

I personally prefer the new layout, but I have not used it yet

Garry Collum

-

13:12

Are they sticky after you open them?

Kathryn Riedener

-

13:13

are those at the bottom, or in a right hand column if your screen is "bigger/smaller"?

Clare Irwin

-

13:13

Is there a community test server where we can check out 3.15? .. our system test server is only 3.14

Jennifer Weston

-

Organiser

-

13:14

butternut.evergreencatalog.com

Jennifer Pringle

-

Organiser

-

13:14

I think MOBIUS's bug suqashing server is running 3.15 beta

Garry Collum

-

13:15

Yep. I just checked MOBIUS. It 3.15ish.

Sarah Childs

-

13:15

I feel like it's harder on my middle aged eyes than the white and blue boxes

Jennifer Pringle

-

Organiser

-

13:16

is there a reason creating the actual template is called something other than Holdings Template Editor?

Britta Dorsey

-

13:16

that is amazing

Jennifer Pringle

-

Organiser

-

13:16

if you click create Template

Jennifer Pringle

-

Organiser

-

13:16

for documenting and training having the two names is going to be confusing

Jennifer Pringle

-

Organiser

-

13:17

I'd also advocate for call the Administration tab Holdings Template Editor or something those lines

Jennifer Pringle

-

Organiser

-

13:18

or Template Administration

Lynn Kauffman

-

13:23

Yes, keep it simple

Jennifer Pringle

-

Organiser

-

13:23

bugs.launchpad.net/evergreen/+bug/2110923

Jennifer Pringle

-

Organiser

-

13:24

Please add heat and comments 😊

Mary Llewellyn

-

13:25

fine with me, coordinated with the acq group

Tiffany Little

-

13:25

Yes please, every other month would be great

Libby McLean

-

13:28

every other month works for me

Millissa Macomber

-

13:28

I'm good with every other month.

Mark Lee

-

13:29

As a new user of Evergreen, is there a specific reason why a different tab opens for editing items or adding holdings rather than using the same window/tab? I find myself with a lot of open tabs when adding items if I am not intentional about closing each tab as I go.

Jennifer Pringle

-

Organiser

-

13:30

we have started having to drop or not join interest groups because we don't have the capacity in our staff to attend all of them as more groups have come in existence

Debbie Luchenbill

-

13:30

Mostly so you can easily get back to the original record

Mary Llewellyn

-

13:30

saving the holdings editor should close it

Britta Dorsey

-

13:30

That's been my situation lately, too, Jennifer.

Mark Lee

-

13:30

I always try to understand the rationale

Britta Dorsey

-

13:31

I really want/need to get back into the interest groups

Kate Coleman

-

Organiser

-

13:31

Me too, Britta. I wanna do all the things, but time is limited

Britta Dorsey

-

13:31

Very limited!

Mike Rylander

-

13:32

another reason: if you open the UI for multiple bibs, you need a different tab per bib

Elizabeth Davis

-

Organiser

-

13:32

We noticed that if you don't have your redirects set up in your browser your experience is very different to someone who does

Mary Llewellyn

-

13:32

we had that marcedit session a while back

Elizabeth Davis

-

Organiser

-

13:32

We noticed that if you don't have your redirects set up in your browser your experience is very different to someone who does

Mary Llewellyn

-

13:32

we had that marcedit session a while back

Mark Lee

-

13:32

Being stretched thin seems to be the new norm

Mike Rylander

-

13:32

so, we just always open a new tab

Mike Rylander

-

13:32

so there's only one behavior

Mark Lee

-

13:32

Got it, thanks

Mary Llewellyn

-

13:34

it's treated by the browser as a popup

Garry Collum

-

13:35

Selecting 'Individually edit selected users' from a user bucket requires pop-ups, or you just are editing one.

Jennifer Pringle

-

Organiser

-

13:36

record buckets are also be on the 3.14 community server

Susan Morrison

-

Organiser

-

13:37

The record bucket docs are updated, too: docs.evergreen-ils.org/docs/latest/cataloging/record_buckets.html

Jennifer Pringle

-

Organiser

-

13:38

there aren't currently docs for the new enhanced MARC editor

Jennifer Pringle

-

Organiser

-

13:38

we've written some for 3.14 but I could definitely have missed things

docs.libraries.coop/sitka/_enhanced_marc_editor.html

Misty Morse

-

13:39

Hello 😊

Misty Morse

-

13:39

Thanks

Britta Dorsey

-

13:40

We're catalogers.....

Mary Beth Long

-

13:40

Hello

Will Szwagiel

-

13:40

We're just normal catalogers.

Will Szwagiel

-

13:40

We're just innocent catalogers.

Sarah Childs

-

13:40

A little bit of grumpiness is prerequisite for cataloging, I think

Britta Dorsey

-

13:40

very demure

Debbie Luchenbill

-

13:41

Kate++

Lynn Kauffman

-

13:41

yes, to see it in use is GREAT for those of us who are visual learners 😊

Kathryn Riedener

-

13:41

I'll take you to lunch, Kate, so we can talk about MARCedit

Tiffany Little

-

13:41

Kate, if you haven't joined the MARCEDIT-L listserv, you should! Half the time I don't understand what they're talking about, but it SOUNDS interesting

Tiffany Little

-

13:42

I'm hoping I just learn it by osmosis

Tiffany Little

-

13:42

By filing it away

Ruth Frasur Davis

-

Organiser

-

13:42

I have something I'd like to talk about related to MarcEdit

M

Misty Morse

-

13:42

Yes thank you 😊

Ruth Frasur Davis

-

Organiser

-

13:43

Well, my AV is touchy today

Debbie Luchenbill

-

13:43

How is you r health today?

Ruth Frasur Davis

-

Organiser

-

13:43

I'm on a 2.4 network. Blah.

Debbie Luchenbill

-

13:43

lol

Ruth Frasur Davis

-

Organiser

-

13:43

I am. Improving, but very tired.

Ruth Frasur Davis

-

Organiser

-

13:43

lol, I don't have the oil on me anymore..it's weird. But anyway

Ruth Frasur Davis

-

Organiser

-

13:44

This is my concern. MarcEdit is freeware but not open source

Ruth Frasur Davis

-

Organiser

-

13:44

And is completely dependent on Terry Reese

Jennifer Pringle

-

Organiser

-

13:44

anyone wanted a start on MARCEDit -

youtube.com/watch?v=JyNcgmn1bKs&list=PLsktT5b82paVQ5JMpJG8hEuqxbX5wsnL2&index=12 (2024

conference presentation with Terry Reese)

Ruth Frasure Davis

-

Organiser

-

13:44

I have NOTHING against MarcEdit.

Ruth Frasure Davis

-

Organiser

-

13:44

My concern is longevity

Will Szwagiel

-

13:44

I wouldn't be able to do a good portion of my job without MarcEdit.

Ruth Frasure Davis

-

Organiser

-

13:44

That is something I'd like to advocated for.

Will Szwagiel

-

13:45

Well, I guess technically I would, but it would take a looooot longer.

Mike Rylander

-

13:45

It's up to Terry. But we have APIs now!

Tiffany Little

-

13:45

It's kind of crazy to me that it's still 100% Terry considering how big it is and how widely it's used

Ruth Frasur Davis

-

Organiser

-

13:45

I like pies...especially in the sky

Britta Dorsey

-

13:45

mmmm, pie

Debbie Luchenbill

-

13:45

(I have to facilitate a MOBIUS meeting at 2/3, so I'm leaving for lunch now...)

Debbie Luchenbill

-

13:45

Awesome!! 😊

Mark Lee

-

13:45

It is difficult to use his product at work when they frown on freeware

Ruth Frasure Davis

-

Organiser

-

13:46

I think there is one person that helps him. But I think, because we use so much invested in MarcEdit functionality and workflows would be severely impacted.

Ruth Frasure Davis

-

Organiser

-

13:46

Yeah, there's nothing wrong with freeware.

Tiffany Little

-

13:46

I think maybe some IT depts think freeware leads to security risks?

Ruth Frasure Davis

-

Organiser

-

13:46

It's just if Terry has any reason to step away from it...

Garry Collum

-

13:46

Yep. Developers are not eternal.

Ruth Frasure Davis

-

Organiser

-

13:46

Everyone is hosed.

Mark Lee

-

13:47

some think of freeware the same as shareware, although they are different

Ruth Frasure Davis

-

Organiser

-

13:47

He's great. It's great. It's just very fragile.

Ruth Frasure Davis

-

Organiser

-

13:47

That's my piece.

Ruth Frasure Davis

-

Organiser

-

13:47

It would be awful. Agreed.

Mark Lee

-

13:47

I might be showing my age a little by referencing Shareware

Ruth Frasure Davis

-

Organiser

-

13:47

I think Evergreen/MarcEdit feasibility study would be a great thing.

Mike Rylander

-

13:48

oh, we can't do that (recreate marcedit), from a practical perspective

Ruth Frasure Davis

-

Organiser

-

13:48

We can't necessarily recreate the totality of it...

Mike Rylander

-

13:49

and that's coming from someone that that says "through dev, all things are possible"

Libby McLean

-

13:49

I wonder if it would scale well to the size of Evergreen catalogs

Jeremy Miller

-

13:49

Once upon a time, in the dark ages, "freeware and shareware" were considered the same category of thing, and potentially dodgy stuff. Not wrong in the case of shareware especially. Policies were written at some orgs, and the issue put to bed. Never to change or adapt again, stuck in the early to mid 90's.

Ruth Frasure Davis

-

Organiser

-

13:49

Exactly. There are "things" that it's used for generally.

Ruth Frasure Davis

-

Organiser

-

13:49

Not ALL THE THINGS.

Jeremy Miller

-

13:49

Most reasonable orgs dropped blanket rules like that ages ago.

Ruth Frasur Davis

-

Organiser

-

13:50

And maybe it's not Evergreen. Maybe it's something that could be used easily with Evergreen.

Jennifer Pringle

-

Organiser

-

13:50

we do have the MARC Batch Edit feature in Evergreen

Garry Collum

-

13:50

I mainly use it for copy, cut, and replace.

Jennifer Pringle

-

Organiser

-

13:50

we don't use - it's too dangerous for us 😊

Ruth Frasur Davis

-

Organiser

-

13:50

Just a few things honestly.

Libby McLean

-

13:50

Tasks are a cataloger's best friend

Mary Llewellyn

-

13:50

👍 to tasks

Tiffany Little

-

13:51

Do we have any shared MarcEdit task lists on the wiki? (I haven't looked, sorry)

Tiffany Little

-

13:51

But that would be interesting to look at

Libby McLean

-

13:51

I shared my Regular Expressions in the Regular Expression Store in MarcEdit--prefixed EVG

Libby McLean

-

13:52

We have a nifty Batch Edit Alternate Bill built for us 😊

Libby McLean

-

13:52

And the ability to use Regex in searches--so helpful

Kate Coleman

-

Organiser

-

13:53

Yeah, that makes us feel good. What we've accomplished and what to look forward to

Kathryn Riedener

-

13:54

Thanks everyone!

Kate Coleman

-

Organiser

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13:54

@Jennifer Weston, thank YOU. You're the best facilitator

Misty Morse

-

13:54



Mary Beth Long

-

13:54

Thank you!

Rosie Le Faive

-

13:54

thank you!

Britta Dorsey

-

13:54

Thank you for all of YOUR work, Jennifer!

Eva Cerniňáková

-

13:54

Thank you!

Lynn Kauffman

-

13:54

Thank you

Tiffany Little

-

13:54

Thank you!

P

Jennifer Pringle

-

Organiser

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13:54

Thank you!

Tiffany Little

-

13:54



Jon Georg

-

13:54

Thank you

Sarah Childs

-

13:54

Thank you!

Misty Morse

-

13:54

Thanks 😊

Libby McLean

-

13:54

Thank you!! 🙌

Mark Lee

-

13:55
cheers everyone

Sarah Cruz

-

13:55


Mary Llewellyn

-

13:55
thank you1