Evergreen Cataloging Interest Group
07/08/2025 @ 2:00pm (Eastern)   agenda link: https://bit.ly/4eFUhKD

ZOOM MEETING LINK https://us06web.zoom.us/j/89440379465?pwd=TVY4anVHZmN6ZlZQRXVTM35eUUyZz09 Meeting ID: 894 4037 9465 Passcode: 086021 The call will be recorded. (See event policy) Please see the wiki for more information.	*Organizing Committee:* - Kate Coleman, Jefferson County Library (MO) - Tiffany Little, PINES (GA) - Mary Llewellyn, Bibliomation (CT) - Kathryn Nesbit, Forsyth County Library (NC) - Elizabeth Thomsen, NOBLE (MA) - Carol Witt, C/W MARS (MA) - Jennifer Weston, Equinox -- Facilitator *Advisors:* - Galen Charlton, Equinox - Andrea Buntz Neiman, Equinox *Retired Members:* - Elaine Hardy, *Retired from PINES (GA)* - Janet Schrader, *Retired from C/W MARS (MA)*

BRIEF AGENDA

Eastern Time

2:00 - 2:15   **Welcome & General Updates**
Standing Agenda Items
Community Updates

2:15 - 3:00   **Program** *(use link to skip to Program notes)*
Bug Squashing Week
Cat IG Meeting Schedule
Amazon Business MARC Records

FULL AGENDA / NOTES

I.   Welcome & General Updates

- Welcome & Announcements
  - Cat IG Wiki

- Evergreen Release Notes and Resources
  - Release Notes:
    - 3.15.2 | 3.14.7 -- released 6/19
    - 3.13.11 -- released 5/21
    - Security Only Supported Releases: 3.12.10
    - Tabular Release Notes – updated
  - Latest Releases on wiki by series - includes older versions
  - Evergreen Official Documentation
  - Community Demo Servers
    - *Equinox-supported General Demo Server is on 3.14.2*

- - - ■ *MOBIUS-supported server with Enhanced Concerto Data Set is updated for each bug squashing*
      - ■ *Czech Republic – now has a 3.13 demo server with translations*
      - ■ *The Concerto logins and Enhanced Concerto logins can be used with any community server using one of those datasets.*
    - ○ Development Roadmap
      - ■ **3.15 Release Team**: Ruth Frasur Davis (ECDI), Martha Driscoll (NOBLE), Jason Etheridge (Equinox Open Library Initiative), Llewellyn Marshall (NC Cardinal), Andrea Buntz Neiman, Release Manager (Equinox Open Library Initiative)

- **Celebrations**
  - **New Releases Keep Coming**
    - ○ Monthly releases – last release was 6/19
    - ○ Bug Squashing Week is here!
  - **Catalogers Map:** https://bit.ly/CatIG_map
    - ○ Is your location missing? Add it to the bottom of the list: Cat IG on the Map
  - **Evergreen Library Upgrades:**
    SHARE - What version are you on? Upgrade plans/news

Library Organization	Current Version	Notes / Next
Bibliomation	3.13.6	upgraded in Feb 2025
C/W MARS	3.7.4 (includes Staff View tab)	Last point upgrade in April 2023; upgrade to 3.15.x planned for October 12-13 2025!!
COOL	3.13.11	upgraded 3.13 in Nov. 2024
Evergreen Indiana	3.13.5	upgraded in November 2024
Kenton County Public Library	3.13.11	Upgraded from 3.11 to 3.13 Dec 2024
LARL	3.11	upgraded from 3.3 to 3.11 on Oct 9, 2023
LiNC	3.14.2	Minor point upgrade at the beginning of April 2025
Missouri Evergreen	3.13	Upgraded to 3.13 February 27, 2025
Niagara Falls, ON	3.10	updated from 3.6 to 3.10!
NC Cardinal	3.13	upgraded in November to 3.13
NCCC Evergreen	3.13	upgraded in July to 3.13 (now 3.13.5)
NOBLE	3.13.5	upgraded to 3.13.5 on January 6th, will upgrade to 3.15 next month
OWWL	3.13.6	upgraded to 3.13 on October 30, 2024
PaILS / SPARK	3.13	Upgrading to 3.15 in November 2025 (currently 3.13.9)

PINES	3.14.3	upgraded to 3.14.3 on Feb. 17, 2025
Skagit Libraries	3.14	Upgraded to 3.14 in May 2025
UPEI	3.12	successfully upgraded from 3.8 to 3.12!
Czech Evergreen Common Catalog SPOK	3.13	upgraded from 3.6 to 3.13 on Aug 23, 2024!
WLS	3.14	Upgraded June 2025

- **Catalogers Connect!**

  Unified Community Calendar — [now available on Evergreen Website at Community Calendar]

  Important Update: Interest Groups are evaluating frequency of meeting schedule; look for announcements

Group	Regular Meeting Schedule	Next Meeting
Acquisitions Interest Group	Quarterly, Feb/Jun/Aug/Nov 2nd Wednesdays at 3pm Eastern	Wed, Aug 13
Aspen for Evergreen - new!	Bimonthly - even months; 1st Thursdays at 12 pm Eastern	Thurs, Aug 7
Authorities Working Group	2nd Mon at 12pm Eastern - Business 3rd Wed at 1pm Eastern - Work Session	Mon, July 14
BIBFRAME Study Group	Limited series of monthly meetings	TBD - watch for announcement
Bug Squashing & Feedback Fest	July 7 - 11, 2025	This week!
Cataloging Interest Group	2nd Tuesdays at 2pm Eastern	Today! next - Tues, Aug 12
Collaborative Code Review	Mondays at 2pm Eastern	Mon, July 14
Development Meetings	2nd Tuesdays at 3pm Eastern	Tues, July 8
Documentation Interest Group	1st Thursdays at 2pm Eastern Even months - business meetings; Odd months - working meetings	Thurs, Aug 7
Evergreen Admin Group	Bimonthly; even months, alternating with Permissions Group 3rd Tuesdays at 2pm Eastern	Tues, Aug 19
New Developers Group	Bimonthly - odd months 3rd Wednesdays at 3pm Eastern	Wed, July 16
Outreach Committee	1st Wednesdays at 4pm Eastern	Wed, Aug 6
Permissions Working Group	Bimonthly; odd months, alternating with Evergreen Admin Group 4th Tuesdays at 3pm Eastern	Tues, July 22

Reports Interest Group	Bimonthly; odd months Last Wednesdays at 2pm Eastern	Wed, July 30
RUST Working Group - new!	Limited series of monthly meetings 4th Thursdays at 3pm Eastern	Thurs, July 24
Student Success Group	Last met during Evergreen conference	To be confirmed
The Evergreen Project Board	3rd Thursdays at 2pm Eastern	Thurs, July 17
User Interface Interest Group	Quarterly; first month of the quarter	TBD - watch for announcement

- **Interest Group News / Discussion** *("Collabormunity")*
  - Updates/Announcements
    - None

- **Launchpad Bugs** (*Standing Agenda Item*) –
  - Links to current bugs - -- see comprehensive list of tags and wiki for more quick links
    - new+cataloging (109) | cataloging (312) | staffcatalog (121) | cataloging+needsdiscussion (10)
  - staffcatalogblocker — **7** bugs without workarounds outside of traditional catalog

- **Launchpad Bug Links to Monitor**:
  - regression bugs (124) – look for cataloging related

Topic 1: Cataloging Interest Group Meeting Schedule
- *Proposal from Cataloging IG Organizing Committee*

Meeting Schedule
We believe there is enough momentum – and plenty of changing features/functionality warranting discussion to continue to meet monthly with the following considerations:
- Meet monthly with the exception of April (conference month) and December
- Every other month (approximately) will be dedicated to Bug List Review and will tailor to specific themes or timelines to coincide with development roadmap
- Formal program presentation at least once per quarter – and make announcements early
- Work with other interest groups to host crossover-IG meetings

Draft Meeting Schedule
- JUL 2025 - Bug Squashing Week
- **AUG 2025 - Program: Regular Expressions with Libby McLean**
- SEPT 2025 - Bug Review, potential cross-IG event - TBD
- **OCT 2025 - Program: All the Templates with Carol Witt & Jennifer Weston**
- NOV 2025 - Bug Review, potential crossover event with Acq IG - TBD
- DEC 2025 - no meeting

- JAN 2026 - Year in Review & Planning (Bug Review, if timely)
- **FEB 2026 - Program: MarcEdit with Kate Coleman**
- MAR 2026 - Bug Review
- APR 2026 - In Person Conference!
- **MAY 2026 - Program: Conference Review**
- JUN 2026 - Bug Review

Discussion
- ○ No discussion; seems okay to people

Topic 2: Bug Squashing Week
- *From Terran McCanna yesterday (Mon, July 7)*

Welcome to Bug Squashing Week!
We have several test servers up and running with proposed fixes and features applied and ready to test. Here is the testing spreadsheet that shows the test server URLs. Please note that there are multiple tabs - the "General" tab has some handy links and test user account info.
https://docs.google.com/spreadsheets/d/1YF8edIJv4ti1xEZEDLkuT4NP8hF3hvJ-qS-Uhuh6OZU/edit?gid=0#gid=0

Some of the ways you can participate in Bug Squashing Week:
- Log into the test servers to see if you find any bugs that have not been reported in Launchpad yet.
- Look at the list of proposed bug fixes and features that have been applied to the test servers - read through the Launchpad ticket to understand the bug and then test out the proposed change. Add comments to the Launchpad ticket or, if the fix works great, you can sign off on it.
- Go through the list of tickets that have the "New" status - if you can confirm one of them, change the status to Confirmed.
- Add "heat" to bug tickets by clicking the "Does this bug affect you?" link just under the bug title. This helps developers to prioritize work.
- If you see a ticket that does not have any tags yet, add tags from the authorized tag list.
- Provide additional feedback on existing bugs by adding comments to Launchpad tickets.

  Bugs reviewed: all Cataloging bugs in the tracking sheet not signed off already
    - ○ **2111948: Enhanced MARC Editor: Adding Subfield Puts Focus on Wrong Box - SIGNED OFF!**
    - ○ **1843837: vandelay: record not appear selected after a merge target is selected - batch import/export MARC** - seems to work so far; Carol will test further ~~and sign off~~
        - ○ Carol's further testing showed it worked for Bib record loads but couldn't view Auth/Acq matches - Carol added a comment
    - ○ **1927538: Marc Batch Import/Export Queue Record matches missing Save Grid Settings Edit** - Save Grid Settings option there but doesn't save changes
        - ○ Carol added a comment
    - ○ **1735857: Consider embedding Accessibility Metadata Project terms in public catalog Edit -** features appear in OPAC when fields fields 341 and 532 are present, otherwise empty; only "Content access mode" filters work in Advanced Search
        - ○ Carol tested further and added a comment.

- **1843837**: Record Bucket - Export - Items 852 Enhancements - still needs test plan, not tested
  - Carol added a comment

Topic 3: Amazon Business MARC Records
- *Links to Acq IG and Cataloging IG Email Threads:*
  - *Catalogers:*
    https://list.evergreen-ils.org/archives/list/evergreen-catalogers@list.evergreen-ils.org/thread/C7UBDCNRJVXX3GDVHDUCEA55UEP74FG4/
  - *Acquisitions:*
    https://list.evergreen-ils.org/archives/list/evergreen-acq@list.evergreen-ils.org/thread/EPYLPXISZXL7RLIWIV6U6RSO4C45EH7V/
    https://list.evergreen-ils.org/archives/list/evergreen-acq@list.evergreen-ils.org/thread/KCIRTXBO3SAXJAARN2DALVM5MQ7IKWVM/

Email threads contains notes from:
Tiffany Little, PINES; Mary Wilson, Carteret County (NC); Mary Llewellyn, Bibliomation; Elizabeth Hager, Porter County (IN); Lindsay Stratton (Westchester)

Discussion
- **Mary (Bibliomation) had a test library; created instructions, task list, join record files - will send to list**
  - Mary sent doc to Cataloging List after the meeting for how to set up MarcEdit and import a task list for adding the tag used for generating PO line items
  - Link: How to Use Amazon Business Services MARC Records.docx

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Next Cataloging Interest Group Meeting:
- Tuesday, August 12, 2025 at 2pm Eastern
  - Topic: Regular Expressions, presented by Libby McLean