Evergreen International Online Conference 2020

Thursday Track 1

June 11, 2020

Batches, Baskets, Buckets and Bookbags

>> DEBBIE LUCHENBILL: I would like to welcome you to day three of the Evergreen international conference and the fourth session of the day. We would like to thank Mobius for sponsoring track one and equinox open library initiative for sponsoring the closed captioning for the conference. If you are not familiar with Zooms webinar controls please take time to acquaint yourself with them. Use the Q&A or chapter questions were used to raise hand button to be called on to speak read the chat is a good place to make comments and interact with other attendees. Make sure that you have the drop down sent to all panelists and attendees. The session is being recorded and that will be available on the Evergreen project YouTube channel after the conference. Without further -- also want to think Karen are great Captioner. Without further ado I would like to introduce Elizabeth Thompson who will talk about batches, baskets, buckets and bookbags. Take it away!

>> ELIZABETH THOMSEN: Thank you. I'm going to share our screen. And I will turn off my face. This is batches, baskets buckets and bookbags, it-- Debbie said it better than I do. What we are talking about -- were talking about different ways to do something with a group of items or group of bibliographic records. For items we have two options, a batch which is not really a container, it is a temporary group of items you pull together for a particular task. And it goes away when you close down the session. item buckets are persistent container of items that stays on the system until you delete it. And then for bibliographic records there is a basket, temporary group of items in that group goes away when you clear the basket or end the session. Record buckets is a permanent container of bib records that stay on the system till you delete them. A bookbag also known as "my lists," which is the patron version of record buckets. So we will look at all of those options.

Batches or groups of items that are brought together in the items --item status screen, it's also called for search for items by barcode breed they can be scanned or uploaded from a file or combination of the two, barcodes can come from scanning items into a text file or report.

Working with a batch is useful for many types of projects including inventory, data cleanup, special projects, for us it is often a project or somebody is pulling science fiction out of fiction into its own section. Or they take the old section of signs action and reintegrating it into the fixed collection but there are all sorts of projects that can use batches.

They are not persistent, they live in the moment and go away when you end that session prints so this is the item status screen. We have a box where we scan items. We also have a "choose file" option where we can upload a Tx load of barcodes. You have a screen that lists items and checkboxes to select one or more or all items and do something to them. The option to sort the column heading is often helpful finding a batch within a batch. In this file there were adult things, children things, things with different statuses and I sorted this by the item status field because I wanted to do something. Wanted to do something that we're currently checked out. And that is why they are highlighted. You can select items by clicking in the boxes in the left column. But this must be done one at a time. You can also select a range by clicking in the row itself. I clicked in the role of the first one I have selected, held down the shift key and then clicked in the row for the last one of the checked out items. And that was easier than checking all the individual boxes.

now I have an actions menu with all kinds of actions. I can edit, delete, update inventory date and in fact, you can see on the screen is only the first section of actions. This is really all one long drop down so you can see that you can do everything from check things in or request them or view the originating acquisition for them, delete the items, mark as damaged or discarded, mark them missing or edit column numbers, --'s only different actions and looking at the list you can think of all the kinds of projects with some aspect that need to be brought together in item status and then do whatever needs to be done to them.

That is what I call item status the Swiss Army knife of the Evergreen system.

I will not show you all the different actions, they all work exactly the way you would expect. So if you click on print labels it would open the label interface. If you click on update inventory date you would get a message saying, okay, I updated the inventory date. This is the -- edit items one and I want to show you this because it's nicely designed for a batch process. So I selected these items, they all have the same status out it tells us the current status is checked out, they all have the Circ modifier book but when it comes to shelving location, the items in the batch came from different shelving locations. So it says multiple locations and then I can click on that to see where those came from. The same is true with the price. It is not filling in a price as being the current value because there are multiple prices and I can see those if I link in that.

But assuming I want to change all of these, I can either make the changes on the screen or apply a template to change them all as a batch.

Although this is not really a reporting function, we do have a couple options to get data from it. There is a print button at the bottom of the screen. This is basically a receipt. In this case it is not terribly useful. It just has the title in the barcode. But it is a receipt template you can edit if you wanted more information because this was useful to you in some way.

But the real power comes from print grid or even more so from download full CSV file with the good thing about these are that they follow whatever you have configured on the grid. So, if you open the file in Excel, you want to turn on every column that will be useful to you. Usually when we try to configure the grid, we do not want to have a whole lot of columns turned on because they get to narrow- too narrow to actually be very useful. But knowing that that day that will go to Excel might make you want to turn on columns you do not normally see. So you can figure, configure whatever columns you want in your report and click on download full CSV and you can open that CSV file in Excel or Google sheets or whatever spreadsheet program. You can do analysis -- whatever you might want to do analysis of, you can do it there. But it always follows what is currently configured in the grid, in terms of the sort order and what columns will be on your spreadsheet.

Sometimes a batch is just not enough. That is when you need item buckets. If you are working on a project that you can do in one sitting, then working with a batch is fine. But if you are working on a project that will persist over several days and you will be gathering different items that will fall into a particular category, where you will want to reclassify them in some way or do something else with them. Or you are working on something like black history month and you want to be pulling items from many sections of the collection over a period of a week or more, before you then go put on, put everything on display -- menu are better off using in--an an item bucket. And the way to get things to an item bucket is if you have already scanned them and they are in item status, adding to an item bucket is the first action on that action menu. You often start by doing the scanning and then you put the things into a bucket.

The item buckets will remain on the system associated with your login until you delete them, unless your local system has some other policy for how long you can keep them. The other good thing about being able to keep them is-- for a project like black history month or summer reading, you can leave them on the system for a year, change things so they are no longer in display status or whatever, and next year you do not have to start from scratch and you will have a batch of things in your bucket and can add new things or remove things that are obsolete or have been deleted or whatever but it can be a good head start for repeating a project, seasonally or annually.

In this case I am on the item status screen and have selected my items. I chose the action, add to item bucket. I see this. It gives me a drop down of existing bucket so it knows how I am logged in and will give me a drop down of my bucket so I can add the new items to the bucket or start a new bucket here and that is what I'm doing. Calling the name of my new bucket "sent to storage", this may be a project or I am selecting things that have not circulated for a long time and I need to pass the report ultimately to someone else to make the decision about whether to send these two storage.

You can also go directly to item buckets and do not have to go through item status. As you see it is called a local search for items by barcode" in the search menu and is in the circulation and cataloging menus rated is also on this main page, portal page as well. It is all over the place because it is often the crossroads between circulation and tech services and collection management, used by a lot of different people in different positions and roles.

This is the item bucket interface, so when we come here it is telling us-- we do not currently have a bucket selected we got that drop down where we can do a new bucket. We can edit current bucket if we had one open already. We can delete the current bucket and often also opened a shared bucket and below the line you see, the see the start of the list of the buckets I own. I own one called children's relocation project, one called Harry Potter, and I can go here to select the bucket or start a new one.

When you create a bucket or in this case edit a bucket a bucket has a name so this is my board book reorg project and it has a description and it's a good idea to add something to the Descriptions especially the project will persist over time or the bucket we used a year later it is helpful to remind yourself of why you put these in there and what his purpose was. And then there's the checkbox that says, publicly visible. I don't think this is actually working yet. It has nothing to do at the moment at least with being publicly visible. It is supposed to control sharing but at least on my system, and this is a training system on 3.4, I'm not finding it that way, I'm finding all buckets can be opened by number and anyone can add or remove items from the bucket. To share a bucket, so this is my bucket and it is number 33, I can say to a colleague, I put together that list that you wanted if you want to see it it is in bucket 33 and they will be able to open it by number.

I don't know because -- ascoma I know what it is supposed to do in terms of sharing permissions but I'm not entirely sure how it is -- if it is working.

In addition to adding things to a bucket from item status you can also, anytime you are on an item view -- you are looking at an item, one of the actions will usually be to add to a bucket so you can always -- just be looking at any item open a full item and decide you want to put that in a bucket bad that's done in cataloging often when you want to give something more attention to you can put them in a bucket and deal with them later.

When you are looking at a bucket, you have the same kinds of options that you have any batch, and item status, you can select some or all and sort by column headings, etc. Then you have actions but you see, you do not have nearly as many actions, I am sorry I'm using a very, very sensitive touchpad here -- you see that you do not have nearly as many actions as you have an item status and you cannot directly open them in item status. There's a Launch bug on this and the repair is waiting to be committed which will be great.

Pending. You see in the bucket area, the bucket view and then we have another tab that's an area called, pending. Pending is not another bucket, it's like a clipboard or place where you can temporarily stick a batch of items to move them from one bucket to another and its value split a bucket or merge buckets or whatever.

Now I look at my bucket that was ocean month display with 50 items. I selected the items in that that belong to the children's department. What I can do with them is use the option to move selected items to pending. When I do that those are now over there, the 18 are over there. I can set up a new bucket which I've done here called ocean children's titles and so now that I have deselected I can use the bucket action to put those into my new children's bucket. And that's how I was able to split one that had both children's and adult items. It is also value merge items by open one bucket, putting items in pending and open another bucket and putting the items from pending into the new bucket that will be merged.

You have to -- full aroma the logic little but you do have the option to do the splitting and merging, etc.

Those two things we were discussing both had to do with item records. Now we cross over to the world of bibliographic records but one of the options, fairly new, his baskets. A basket is a temporary group of bib records and they have various purposes.

In the public catalog, the basket for -- patients replaces separate lists and lets the patron choose a group of things and then turn that into a new or existing --my lists . In both public and this cast out catalogs, baskets can be used to place multiple goals on a group of titles. In the staff catalog, baskets can be used to select a group of titles and move them into a bucket. Records stain the baskets till they are cleared or the session ends.

I am here and I am selecting -- I did a search on authors so, Susan Orlean, I checked off the Orchid Thief. It tells me at the top of the search results it says three selected titles so I know I have three. The background for the Orchid Thief you can see it's checked often as has the gray background as an easy way to distinguish records already in your basket versus records you may be adding to your basket. So I can go over to the actions, the baskets actions, and choose "place holds".

I am sorry I am in the staff client here. So, for the place hold dialogue, I have the thing you always have-- even when you are placing a single hold-- which is it is asking are you placing this for a patent in which case why don't you tell me their barcode breed are you placing this for the staff login? So it is showing me the three books I wanted to place a hold for my patron. Place on hold for my patron. And I only have to answer the questions of the pickup location and the notification and all of that. Once.

I can click, yes, to suspend the holes and give it an -- activation date and I can clear the basket after the holds are requested. Personally I wish that were on by default. The real issue is are you done with the patron or after you place holds do they want you to print a list of them or do something else? If you are done with the patron and have reason to believe they are on the way out the door you want to make sure you clear the basket, so the basket does not end up being an active basket and you choose some other things for another patron and now you are adding holds that new patron did not want. So the answer to that should almost always be, yes, want to clear that basket unless the first patron is hanging around to do more with you.

The basket persists through the session or until cleared preview can also -- I keep showing them as being something you access through search results. But you can also be on a particular bib record so I'm on the record here for American Fire and I have the option where I have printed mail and all of that and I can add this to the basket individually there. You can't this lasts through multiple searches. So if I were doing -- putting together things for a book display on lions and tigers and bears I can do a search on lions, choose a bunch of things, do a search on tigers, choose a bunch of things. Then choose bears and choose a bunch of things and think of another thing and go directly to the record, and put that in there. I can take things in and out of the basket, it is a shopping cart so you find additional things. When you have the things you want, you can place a hold on them or, in the staff client you can add them directly to a bucket.

To me, this is a great interface to the buckets integrate gathering place that lets you do searches and look at the bibliographic information. Etc. So it is a good thing to use for all sorts of displays and book lists or anything we want to search around to the catalog and hand select some things that you want to do something with in a bucket.

Here is how I add my basket to my bucket. And I get that same dialogue asking me -- that I get with items to put it in an existing one or open a new one. This is just showing you can go directly to record buckets, I have it here on the portal page. It is also in the cataloging menu. When you go here, you have very similar to the item bucket interface, you have the option to create a new bucket, to edit an existing bucket, to delete one for shared bucket, if I open that it would ask me for a record bucket number and I would give it that. And it would open that. And then you have create carousel from bucket, which is new and exciting.

And I have a start of a list of buckets I already have on the system.

I am over here -- again you do not need to be working from that search interface and basket kind of interface, anytime you are in a bib record like anytime you're in an Id. record you have the option to add something to a bucket. This is also in the XUL client but it is now easier to find -- cataloging and-- -- if I am cataloging and I see an error or something and want to do I can put these things in a bucket that way. You can't looking at my buckets, I have the option to select a group of them and I have actions for them.

You have fewer actions for bibliographic records than you have for item records, but you do have certain ones and -- one thing to my knowledge you can only do through a record bucket is merge records. I really like this screen. So I think these two records are duplicates bad I choose them and with them into a bucket and sometimes we have three or four records that might be duplicates. And I can determine which is the lead record. I can edit that record a little bit and merge the two records together using a merge profile if appropriate. That is one of the uses for a bucket.

The record query, this is a very cool thing in record buckets. You can search -- I will go directly to it -- you have an option here called record query. You can give -- -- you can give a query, enter a query directly here and searcher bibliographic database.

Saw here I say I want things that have the subject ocean, I truncated it so I would get ocean, oceans, oceanography, oceanographer or similar things. And so it will pull up for me all the records that match that search I did. And then I could throw them into a bucket. In this case, there is a limit on the size of query that it will do. I am on our training server and I believe it is set to default which is 1000 records. We have set to a higher number on our production server. But X if you get to an even number and it stops that has probably hit but limit. Here in the queries I can do, I can get all Boolean my can also limit two things by library. Because we do not want to run into a limit, we almost always do this so in the examples you can see for the same thing, I did subject, ocean, truncated, and site:WAKEFIELD so I went all the ocean things but only if Wheatfield is attached. I left the queries because you can get interesting information. The one on autism and where it is truncated, we were looking to see everything related in any way to autism in our collection, including electronic resources, fiction, nonfiction -- anything that somewhere included the word because we were interested in the date ranges and whether some of that material was outdated, etc. So it was an easy way to put together a whole group of things.

Just showing off the bullion stuff you can do, I did subject, Christmas and use the quotes and "||" which is the OR. And you can use the"&&" for AND, so in the last when I was looking for things with learning or reading, disabilities or differences or difficulties or dyslexia -- so I had -- it is just showing that if you try to analyze something from your collection you can get really detailed. By the way, all these queries would also work in the catalog, but I tend to mostly use them here.

Once we have the records here, we can put them in a bucket, which we sometimes want to do, but we can also use the actions right on the record query screen to output them as a CSV file, and take them into Excel -- to do something.

Patrons -- patients also have baskets. So I am logged in to patron account here. I'm doing a search and choosing books about Greenland I'm interested and reading and I could do other searches and so on. When I am ready, I have the option to place a hold on them. So I can do that. By the way, patrons have the ability to place holds on a batch of items before using the temporary list. It is just that they did not always -- there wasn't a way to put together a batch and then see an option that was called "placed a hold" the patron is placing a hold on three titles.

They will not be -- the first one is an e-book, so that not be eligible for a hold by Evergreen. When they place the solely, like we did with the staff client, when they place a hold the choose their pickup location and all of that once and they will get back a list of the holds in which were successfully placed in which were not so they will get that information if for whatever reason they cannot place a hold on something.

Again, I'm still in a patron account, I can also add my basket to a saved list. So, I will choose that. And it takes me here, so I am in my "might lists" interface in the public-- "my list" in the -- catalog. I can decide whether to share the list or keep it private and click on, submit, and it goes with my other saved lists. I also could have chosen one of my existing lists.

Here is a patrons "my list" and what it looks like when it is made public.

I mentioned opening -- I mentioned that you can open a shared bucket using the bucket ID. This -- I do not know if this is intentional or a bug that somebody will turn off at some point -- but when you look at a patrons "my list" you can see in the URL, something that says "bookbag ide or bookbag" that patrons list that they had decided to share, if I open that I can get that number. I can go into the staff client and open that in the staff client. Don't ask me why it's his load shared bucket by ID.

But now I have that open here - we actually have reading group leaders and that kind of thing better putting together lists, using the "my list local function but the staff can do something to do a display or something else with them if they have that number. But I've got my patron number here, this was my list but it is open as a record bucket. In the staff client.

So in summary, we've got, for items, we've got batches, which are in the item status screen and pulled together temporarily. We have item buckets which are persistent, stay on the system until the bucket is deleted. And can be used for all kinds of editing, updating, changing data, updating marking, missing and those things but then we have bibliographic records, which can be in a basket and a temporary group that goes away. A record bucket which is a persistent group that stays on the system until deleted. In the book back also known as "my list" which is the patron version of record buckets. And that is about it.

Any questions?

>> DEBBIE LUCHENBILL: Elizabeth, we had questions in the chat earlier. Let me get back there. Then from Cena-K regional library asks, what is in the list when you print it? Title, author, call number?

>> ELIZABETH THOMSEN: In which list?

>> DEBBIE LUCHENBILL: I was going to say --

>> ELIZABETH THOMSEN: When you are in a bucket, --

>> DEBBIE LUCHENBILL: The basket list she says.

>> ELIZABETH THOMSEN: When you are in a basket list, you could and not very useful list. It is the same list you've always been able to get for any group of records. But there is development that part of the -- it was a development link into an ECDI development in -- 3.5 which will give you more control of the content of those and have more information that patients are actually looking for and not -- and not just like the record number, but things like the local call number, etc.

I will add a note about that to the slides so that gets there, I should have done that. And yes, emerging records, merging records -- you can manage to get a record that is better than either of those records by copping the group of fields off of one to the other so you have one super record combining the best of both of them.

Where you set the number of records -- I asked Michelle and she does it so it is a setting somewhere in the system and I think I will add that-- I will also add that to the slide.

There's a setting that says if you do a search ended results in one hit that the record opens of course, I do not remember where the setting is or what it is called. But I know there is one [Laughter]. Yes, it is in library settings.

In my organization, I am not the person who is allowed to change library settings. Okay I think I am done.

>>   DEBBIE LUCHENBILL: All right, did you see -- oh, never mind, okay [Laughter]. Okay. Thank you, Elizabeth for -- that was really interesting and helpful. Thank you, everybody, for attending today. And -- you can stick around and we are continuing to -- record all the way through so if you want to continue the chat please do so. We will have our next session and we will start at 4 PM Eastern/3 PM central and 1 o'clock Pacific.

[Laughter]. So, yes, so we will see you back. And if you are going to the other track log out of this so there are enough seats for those who want to attend the next session. Thank you.