Evergreen Conference

Batches, Baskets, Buckets, Bookbags, and Carousels

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>> KATIE GREENLEAF MARTIN: Welcome everyone. It's 330 so I will do my spiel so I can turn it over to Elizabeth. I want to make sure to think Mobius and Evergreen community development initiative where there is significant sponsorship of this event and I'm excited for Batches, Baskets, Buckets, Bookbags, and Carousels I will put our link to our live captions in the chat as well. As people have questions during Elizabeth presentation, put those in the chat and we will get to them as we have time. Over to you, Elizabeth Thomsen.

>> ELIZABETH THOMSEN: Okay. Are you seeing my screen?

>> KATIE GREENLEAF MARTIN: Yes perfect.

>> ELIZABETH THOMSEN: I'm going to talk about Batches, Baskets, Buckets, Bookbags, and one thing about carousels, these are containers and groups of items are bib records. So for item records we have a batch which is a temporary group of items you pull together and it goes away when you shut the tabs. item buckets is a persistent container for items that stays on the system to you go in and delete it. For bibliographic records, we have baskets which is a temporary group of bib records way which goes away at the end of your session or when you clear it.

Record buckets, a persistent container for bib records, stays on the system till you deleted. In book bags, the patron conversion of record buckets, and then carousels I have just one slight comment to make about that.

So for item batches, this is usually a project of some kind like have a group of items that I want to delete or have a group of items that were pulled from the picture book collection because they are going to be in a separate section because they are alphabet books so we will add a different copy location or prefix or suffix or something or group of items like summer reading that will circulate for a different length of time and perhaps also have a different location or whatever. So you are trying to achieve something for a group of selected items. It's useful different projects. The thing about item batches is you close that tab and they are gone. You can get to item batches, which is the item status screen, you can get to that from the search menu under search for items by barcode.

I have a batch here. You have multiple options for creating a batch. It may be the most common is to have a pile of books and a scanner and you're just scanning items because you are doing something physically with the books you need to re-label them or you are moving them to a different section, putting them on display, whatever. So that is an option to scan and they just appear here.

We have two other options and I clicked on both of these question marks to show you the helpful help so one is to upload a text file that has one barcode per line and you can do that in that is actually what I have done here. I had a file of barcodes that I uploaded. The other option which is newer is that you can paste in a list of barcodes that are separated with commas so if you are working with a CSV source that may be an easier way to do it.

You can actually do all three, scan a bunch of them and upload a file and paste them in or whatever. And so this is what the batch looks like.

Maybe the most common thing is you will select them all and you will go to the actions menu and do something to all of them. So I scanned or uploaded all of these, my goal is to delete them also I come to the actions menu and these are selected and I click, delete items.

The actions menu is really long and it has pretty much everything that you could ever possibly one I've never used. But every sort of thing -- this is why this process is so good, it is the Swiss Army knife, if you try to do something to items there's probably a batch action for that.

You can also select group of items. That may mean maybe you are looking at a report and you know which ones were not found on the shelf and so you want to select those individually. Often, you can sort by a column heading to bring together a group of items that have something in common. It could be all the items that are currently checked out or it could be, in this case, it is the children's graphic novels.

I want to do something different to these that I will do to the rest of them. So I just selected that group and I can choose whatever action I want to take on just this group of records.

If you use the grid in sort by different columns or even to understand what you have on the screen, it is helpful to come to the menu which I wish it had a name -- so the most useful grid menu here -- and decide which columns you actually want to see.

This might be exactly what is always set for item status or for a particular project you may need to turn on or off additional columns but it is worth it to get exactly the right set of columns that you want but you can save columns if what you are doing is creating what you always want to see in item status but you may want to change something, some columns on the fly for a particular purpose. The other options that you have here is printed in full grid which will print the list as a table.

I don't know how often people do this you would probably want to do the setting the print to be landscape. But maybe the more common option is to download CSV. So if you do this you are downloading all the items that are in that grid at the moment, all the items, and downloading them as a comma separated file that you could open in Excel or Google Sheets or whatever -- for more advanced formatting or analysis.

Both of these options use the current sort order and the current column settings. So you might want to adjust those, just for the purpose of what you want to actually have appear in that spreadsheet.

For example, if I wanted to present to somebody, here's a list of all those things I deleted for you or move to alphabet books or whatever, you probably would not include the status column because that is something that changes as things come and go.

There is a print button on that screen, this is probably one of the lesser used item templates number receipt templates. The one here is not particularly useful but there may be circumstances where what you want is a quick list to give to somebody to pull selected items from the shelf. And this could be with your receipt printer or you might be using a different printer for this receipt. But there is a receipt template you can configure for that.

As I said, the bad thing about item buckets is that they go away. They live in the moment and they disappear, when you close the tab -- so if you accidentally, if you scan 100 items in a new accidentally open another process in that tab, or you lose power or some other bad thing happens, your project is gone.

So for anything where you have an ongoing project where you may be interrupted or you have a project that will take place over many days or anything where you want to go back to the items again then you really need an item buckets and you need to put them someplace altogether safe where you can get to them anytime. That is an item bucket.

I've selected all my items and one of my options is to add them to an item bucket. When I click on that I have two choices here grid I can either create a new bucket so I'm creating this and typed in the name I want for my bucket and I would click on the add to new bucket. Or you have the ability to add it to one of the buckets that you already have. So this is a drop-down that will show the my pockets and if this group of items as part of my Melrose fiction project I would click on that, add these to the selected bucket.

This gives you a way to keep using item status and then just dropping them in periodically so you don't lose them.

You can also go directly to item buckets. I accidentally chopped off menu at the top here but this is under the cataloging menu and there is an option for item buckets and you probably also have an option for item buckets on the splash page.

This is what the item bucket interface looks like, there is options like new bucket, edit bucket, delete bucket and shared bucket and a list of your current buckets. Then you have a pending tab. If you want to create a new bucket, you choose, new bucket, from that drop-down. It asks you to give it a name and a description.

And there is an option to set, to be shareable or not. If you make bucket shareable it means it can be accessed by any other staff member. But how this works is also dependent on a few container permissions set up for your system and whether it is set at the consortium or the system-level and so you need to check and see how that works in your system. If somebody is access to your bucket they can do anything they want to it. We would like to see something more like Google Docs where you can give people view permission or view and edit permission but not delete or more finely tuned permissions. Give permission to a specific person not just clicking the shareable thing.

This is what somebody uses if they want to access your shared bucket, they have to have the bucket ID and they type or paste that bucket ID here and that will open the bucket for them. So if you want somebody to have access to it you need to send them a message saying please see my bucket number 12345, you will find it interesting.

The item bucket interface has those two tabs. Bucket view, and I created a bucket and my bucket is sitting here waiting for me to add items to it. It also has pending. When you are in the item bucket interface you don't have a way to add items directly to the bucket. You have to add them to pending which is the waiting room for the bucket. You have to add them to pending and then select them and tell them move over to the bucket.

Here I am on pending and I see the only way that I have here is to scan the items, and that's fine if I have the pile of items I can scan them all -- it will look very much like the item bucket list or to select them and move them into the bucket but there's no option here to upload a file or any of that. Which is -- why the item status is so useful. So you may find yourself just using item status always to add things and then or at least if you're drinking use files, and then select them all and move them into an item bucket that way. Anytime you open an item record so you are looking at a bib record and one of your items is attached and you click on view, anytime you look at in item 1 of the actions you have is to add items to a bucket.

Set up a bucket for something, maybe display you are working on or something like that and every time people think of another item that ought to be in there you can just add it individually.

Looking at my bucket, I did get these items in here and selected actions and I do have actions but I have far fewer than I had in item status. If the action you want to take on these items you carefully put into a bucket is not on this list, and you can use open in item status to get back into item status with everything that is in your pocket where you have every conceivable action available to you.

Those are the two things that have to do with item records. And now we will talk about bibliographic records. There are two options here, one is working with a basket. A basket is in both the public and staff catalog, baskets are temporary containers to place multiple holds, used in the public catalog to work with my lists, and they are used to select a group of items, basically go shopping in your database. Select a group of titles and then move them into a bucket.

You really need to be careful working with baskets. That you clear the basket. Especially when you are placing hold so that you do not accidentally place holds for one person that include all the holds placed for somebody else. Records state in baskets until they are cleared, explicitly cleared, or until the Evergreen session ends.

I am in the angular, I am in the staff client in the angular catalog and I did a search on whales and I'm basically shopping so all I would like this one and this one. And I can go on and every time I click one I can see that the basket counter, there are 11 -- 11 titles currently in the basket. If I unclick this when it will go down to 10 and if I click this one it'll go to 11. is interactive shopping, in my make-believe project here on putting together a basket to create a bucket to work with the carousel storm intentionally not taking this one because it does not have a cover. And I am not taking this on because I don't like the cover.

Whatever your project is, you may be choosing things for aesthetic reasons as well as how well they fit a project or whatever.

I have some items here in my basket. One thing that you can do with items at excuse me, with titles in a basket, his place holds for the patron. So I had a conversation with this patron, this is all make-believe, had a conversation with this patron and help them select four titles they wanted were they came in and asked specifically for these four titles.

I put them in the basket and then I clicked on the basket action to place a hold. I need to get the patrons barcode if they're not handing me their card can search for the patron and bring it in that way. And these are all attributes of those holds these the titles in this hold was successful. I guess I mixed these up, I should have showed you hold pending inflict on them and the hold was placed for all of them. One of the other actions for things in a basket is to move them into a bucket. And this is kind of the same issue as with items. That basket is going to be cleared and you will finish your shift and log out.

Those things you carefully hand selected and put in a basket are gone. So that is where record buckets come in. Record buckets are a persistent, stays on the system until you delete it, folder or file or container of bibliographic records and they can be used for multiple purposes for emerging duplicate records, batch editing or building carousels.

They also have a search feature that is kind of interesting. I have six things I selected and I want to use basket action here to add the basket to a bucket. I will choose that. Now it is asking me for the bucket, this is a nice way to display this -- I have an option to choose an existing bucket in which case I have a drop-down that shows me all the buckets. I have a tab for new bucket in which case it will ask me what I want to have for a name and description of that bucket. Or I could add it to a shared bucket in which case it will ask me to put in the number. You can either way, any of these three ways, I am taking those six items and adding them to an appropriate bucket.

This is the record bucket interface that we can get from the cataloging menu or the splash page, splash screen.

This has three tabs. It has the bucket view and the pending. And it has menu that has new bucket, edit bucket, delete bucket, shared bucket or create carousel from bucket. And then here it has a list of the buckets I've created.

The bucket view, like the bucket view for items does not have any options for adding records. So I come to pending, hoping to find some options for adding bibliographic records. But there are not any. We will talk about the record query in a minute.

The best way I've found to add or one way I found to add bibliographic records to a record bucket is if you have the items because you did something to the items or you scanned the items then you have the option to add this to a record bucket. I add them to an item bucket if I want to have the Bibliographic records, I add them to a record bucket.

you can also add titles directly to a bucket from the bib record and I look at the bib record I think it would be good for my project or whatever that is and I can add this to the bucket that way.

I have here I have a bucket view and I have selected them all and I have a number of actions for them. So selected records in the catalog -- will open a separate tab for each records which is handy if you have 2 or 3 but not so handy if you have many. I can move the selected records to pending records and one of the reasons I might want to do that is if this has fiction and nonfiction or some other grouping, I might want to take all the fiction titles, send them to pending, remove them here, create a new bucket and move them there.

Pending which is a little beyond what I will talk about in this session but pending is what you used to split a bucket into two or more individual buckets or to merger group of records together so it is a temporary holding space for a group of record so you can bring them in and out of different buckets.

I also have the ability to transfer titles here, title holds here. Or to merge selected records. So this is how you merge records. You put the two records that you want to merge into a bucket or you select the two records that you know that you want to merge from a bucket. You have the option of choosing a merge profile and you can choose like which record do you want to end up with? So this is the lead record because I've decided this is a better more complete record. I would merge the other one into it. If I have three record since he wondered I do not want to have as part of this merge I can remove that from consideration.

The other nice thing is you have the ability to edit so you might want to make the speed the lead record but there is a summary note on this one that you want to retain so you want to move that over. So that is how you merge records.

Record query is a search option. This is all way to search your entire bibliographic database for --in any of the ways that you can search in the catalog, so I am single want to look for the word "ocean" and I will truncate it because I really want ocean commotions, oceanography, etc. In the subject heading.

I am doing this and it will go off and do the search. You have to watch her record query limit and this is on a NOBLE training server and the record very limit is 1000 but we've bumped that up on a production server because we use it a lot and when to have more than 1000 records. Need to keep an eye on that and so on.

This is showing me everything that we have in the collection that has anything to do with ocean and oceanography etc. Now, it may find some unexpected things, it is a subject search but it may find a book about somebody whose last name is ocean or other sorts of things but it's pretty useful. And then I can put them in pending or in a bucket directly.

The great thing about that record query, you can search author, title, subject or keyword and if you do not specify you get a keyword. You can limit it to items that are owned or licensed to your library if you are using located the URIs using your library short name. So in NOBLE's case for electronic resources, we do use -- our records would have an 856 link with the subfield nine, that says Wakefield or Melrose or whatever library license. You can use Boolean operators so the and is the Boolean operator "and" in Evergreen speak. The two pipe characters, the vertical lines is the Boolean operator for "or". And you can mix and match these. This is a search we've done a number of times. I just want to know in the whole NOBLE database including the electronic resources, I want to see everything that is about autism or autistic or just any words that have to do with autism.

Because we want to look at those and look at how old some of those titles are and whether they are titles that you would want to read because they are outdated information that you do not want to retain. This is the ocean one but I added site Wakefield toyed only get things that are owned by Wakefield or are electronic resources that we loaded for the Wakefield library. And then you can get fancy so this is the subject Christmas but I'm looking for Christmas in Holland or a Dutch Christmas or what is it like for Christmas in the Netherlands? It has to have the word Christmas and attests to have the word Netherlands or Dutch or Holland. Any of those.

And this is a mini lesson on Boolean searching but it is helpful to get a whole file of the spirit we were looking for things about traditionally were called learning disabilities more commonly called learning differences at some point learning difficulties so am looking for anything that has learning or reading and it has something that implies, was going to say disability or disabilities or difference or differences or difficulties or the word dyslexia. You can really use this and get a useful spreadsheet for a single library or across the consortium for what kind of resources you have in a particular area.

Abrupt change of topic here. You have to look at baskets for patrons. This is in the traditional catalog so it's what we’re using for the public. I'm locked in as a patient but I've selected a couple of titles that have to do with Greenland. I have 10 titles that have to do with Greenland. I have basket options and I can place holds with them just like the staff could place holds and this is the old look of the interface and what I showed you before was the angular version in the staff client but this is what patrons see.

>> KATIE GREENLEAF MARTIN: There was a question about this looking different than what people are seeing in their own consortia and so Jeff noted that you guys used 3.6.1?

>> ELIZABETH THOMSEN: Yes.

>> KATIE GREENLEAF MARTIN: So those of us like in Pennsylvania who are still on 3.3, --

>> ELIZABETH THOMSEN: It is coming attractions.

>> KATIE GREENLEAF MARTIN: Some people also may not be making as much use of the angular interfaces so just to let people know if what you are seeing does not look familiar, do not panic. [Laughter].

>> ELIZABETH THOMSEN: Okay I actually, last year's version of this I only, I didn't use any of the angular catalogs --maybe I will post both versions with both sets of screenshots. It's all the same functionality. The different layout and so on.

>> KATIE GREENLEAF MARTIN: Yes it does the same things it’s just a little different but …

>> ELIZABETH THOMSEN: It is helpful to see both versions.

So this is placing all hold and the patron you are placing a hold, the patient has a downloadable e-book and that hold is not going to work. But when they place the hold, they get a confirmation message which will say, successfully placed, successfully place. No holdable copies available. So it will tell them if they've been successful.

The other thing that patrons can do -- I will go back to the presentation mode here. Just like staff can put things into a basket and add them to a bucket the patron version of that is to put things into a basket and then add them to a saved list so my list functionality, that is how they can do this. This replaces what was called temporary list previously. And this is actually much nicer. This patron has put things here predinner want to add the basket to a saved list. I am logged in as a patron I can create new list here at the title and so on and whether I wanted to be shareable. This patron, this patron fatally created. This is Matt Byrd's Birds. I stripped off the header seek and see more of the items so this is a list that that patron can come back to themselves if they want to find their favorite bird books but it also has a URL that they can use because they said they wanted it to be public. So they can send this to their friends or send it to their birdwatching local email list or to anything else that they want with it. It is a way that patrons can create a shared list.

Want a patron creates a shared list, and makes it public that there is a URL and the URL has a bookbag number. Behind the scenes the system doesn't call these my lists, it calls them bookbag. So if Matt posts his list and I really like it and I am a staff member of the library or if Matt in fact comes to me he is going to come speak at the library and he wants to share this list. One of the things to do is open it as a bucket. Using this ID and I love doing this because it feels cool. You get the bookbag ID and choose load shared bucket by ID. Put in that number and load the bucket.

Now I am back being a staff member and it has opened the list. I used to Greenland example for the screenshot. The theory is the same. You can take that an open it as a record bucket whether that is to check and see if your library has copies of all of these or to do something else with them. Maybe you want to make a carousel for your catalog of Matt Byrd's Bird Books.

staff can do this also. I'm in the public catalog and I am login as a staff user. You can use your evergreen credentials and evergreen staff client login and password which will work in the public catalog so here I put 10 titles in a basket -- I chose to make this list so it is giving me the create new list, from the basket options so it's asking me for the title and the list description rated asked me if I want to share the list, meaning if I want it to be public and have URL that the public can access and I do and I want to move the contents of the basket to the list. And I do.

And so I click submit it gives me this appearance of a public list that has a public URL that is all the things I created this in the public interface when I have a real URL for it. We actually do have staff who have done things like this and it is an alternative that people have. I only have one thing to say about carousels because in track two immediately after this there will be a very excellent session all about carousels. But I just want to mention something that is about the relationship between carousels and record buckets. I have this record bucket, this is my Nordic record bucket and I want to create a carousel from the bucket so this is a very handy option and when I do that it asks me what I want is a name for the carousel in case I do not want it to have exactly what the bucket has. So I gave it dark stories from the land of the Midnight Sun.

I would click here for create carousel and it creates the carousel but it is making a copy of that bucket, it doesn't exactly tell you that. You can see that here, this is the carousel that I created this is a system bucket for carousel 46 copied from bucket 442... whatever that bucket was. This, I don't think shows by default. So it is easy to assume that you have this carousel and you turned it into --excuse me you had this bucket and you use that interface and buckets to make a carousel out of it but if you wanted to remove or add some things to that bucket that that would be away to add or remove some things from the carousel but it is not. Because the carousel is working independently on the copy that it made at the time you created the carousel.

So you do have a second kind of secret bucket that it created. For more on carousels I highly advise you to go to the carousel section in track 2.

Are the questions? I should check the chat.

>> KATIE GREENLEAF MARTIN: Not a ton of questions. The URL for the list are persistent. I believe that is true.

>> ELIZABETH THOMSEN: Yes the list created in the public catalog that's a persistent URL that will last until you are the patron goes in and deletes that for the changer to make it nonpublic anymore.

>> KATIE GREENLEAF MARTIN: Someone asked what the carousels are used for and I would say go to the presentation on carousels.

>> ELIZABETH THOMSEN: Yes the carousels are really awesome they can display on your library catalog in the area below the search box and above the footer. And you really want to go to that session.

Jeremy says we are experiment with the WordPress plug-in that can display bookshelves via ILS APIs including Evergreen. We are using that -- we are using that as well. We might be using it in a different way than you are, getting the data in a different way using a local tool. It's a little frustrating to us we love the library bookshelves to do things on our WordPress sites and we love the carousels interface to put things on that catalog but we wish we had one tool that would give us an easy way to put the same carousels in both places. But about the library bookshelves thing, it is really worth checking it out if you do use WordPress and the developer has been very responsive to adding things and helping us work things out so they work as well as possible in our system.

But the integrated carousels for the catalog really nice. And as a promo to get you to go the other session -- this is what they look like, what the libraries are using them for, this is the Reading Public Library.

>> KATIE GREENLEAF MARTIN: Can you share your screen again?

>> ELIZABETH THOMSEN: [Laughter] Sorry. I was scrolling to the carousels expect you to be impressed and I hope you like it now that you can see them.

>> KATIE GREENLEAF MARTIN: One of the things that will probably be covered in the other session is you can have automatically generated bookbags.

>> ELIZABETH THOMSEN: Yes.

>> KATIE GREENLEAF MARTIN: Sorry --

>> ELIZABETH THOMSEN: I touched on them to make sure we didn't have overlapping material. So they have all the cool stuff on carousels and I look forward to going to that one. I have a list of answers to questions that I will pose along with the slides. There are technical things you would come across. If you have a file of items and you use to make it a file of bib records, it does de-dupe that list so if you have three copies it will not put it in the file three times. But it looks like it is. So I've got some things you may run across while working with the buckets things. How do you like my promo for the session?

If there aren't any more questions I will post more on this and I have screen casts on the merging and splitting of buckets and other things. Enjoy the rest of the conference.

>> KATIE GREENLEAF MARTIN: Thank you so much, Elizabeth, that was so instructive and I can tell you that I had a couple of people pinging me during the presentation about doing some of these things at our libraries. [Laughter] So I can ensure you that it will definitely be useful.

>> ELIZABETH THOMSEN: And am posting a list -- how to add heat to them related Launchpad books.

>> KATIE GREENLEAF MARTIN: And I think it was earlier today or yesterday a session on learning to do that with Launchpad. So if you didn't catch that one catch the YouTube recording when it comes out.

>> ELIZABETH THOMSEN: And the one I said -- it said open bucket bucket, it had the word bucket twice that is the one that Terran was using as an example so we got heat attitude -- is because it was the most recently added bug at the time she OPENED THE LIST> >> KATIE GREENLEAF MARTIN: You should do that strategically.

>> ELIZABETH THOMSEN: That is exactly what I'm going to do. Thank you everybody.