

Batches, Baskets, Buckets and Bookbags

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Evergreen Conference 2021

Containers of Items and Bib Records

Item Records

- 1. **Batch** -- A temporary group of items pulled together for a particular task, group goes away when you shut the tab
- 2. Item Buckets -- A persistent group of items, stays on system until the bucket is deleted

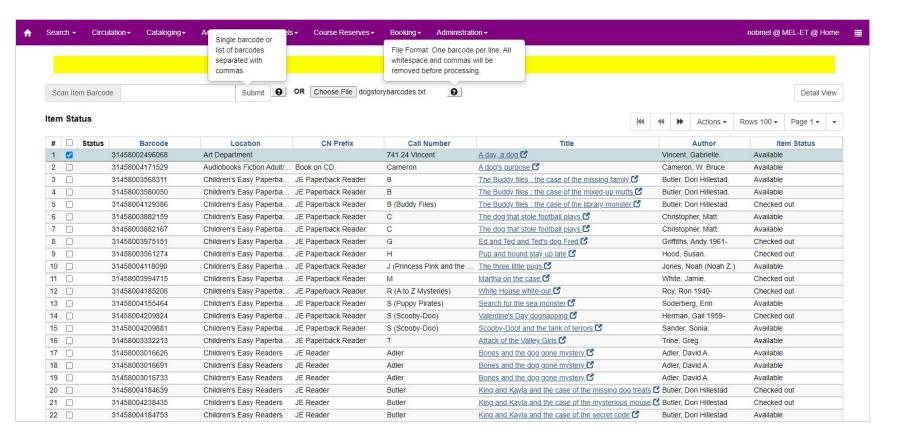
Bibliographic Records

- 3. **Basket** -- A temporary group of items, group goes away when you clear basket or end session
- 4. Record Buckets -- A persistent group of bib records, stays on system until the bucket is deleted
- 5. Bookbag (Also known as My Lists) -- The patron version of record buckets
- 6. Carousels -- Just one thing

1. Item Batches

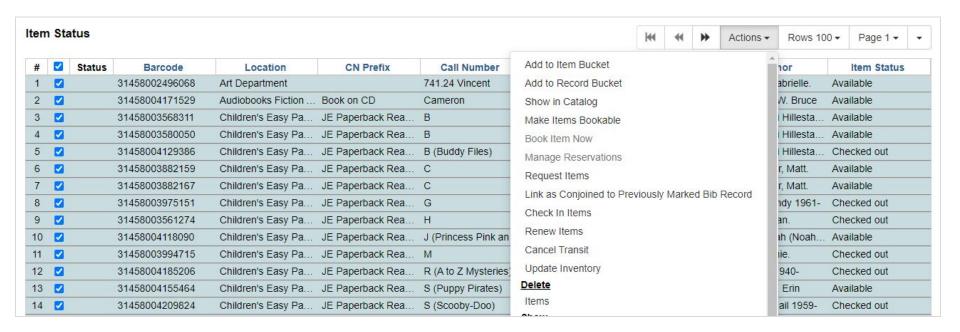
- Groups of items brought together in the Item Status screen (called Search for Items by Barcode on the Search menu)
- Items can be scanned or uploaded from a file or a combination of the two. A file of barcodes sometimes comes from a report.
- Useful for many different types of projects, including batch updates, batch checkin, updating inventory dates, data cleanup, managing items going in and out of storage, special projects
- Item batches are not persistent, they live in the moment and go away when you close the tab

1. Batches Using Item Status (Search for Items by Barcode)



Select All Items and Take Action

Edit or delete items, update inventory date, print labels, manage alerts and copy tags, mark missing, edit call numbers, and more



Complete List of Actions

Add Items to Bucket

Show in Catalog

Make Items Bookable

Book Item Now

Manage Reservations

Request Items

Link as Conjoined to Previously Marked Bib Record

Check In Items

Renew Items

Cancel Transit

Update Inventory

Delete

Items

Show

Triggered Events

Item Holds

Record Holds

Print Labels

Originating Acquisition

Mark

Item as Damaged

Item as Discard/Weed

Item as Missing

Add

Items

Call Numbers and Items

Item Alerts

Edit

Call Numbers

Items

Call Numbers and Items

Replace Barcodes

Manage Item Alerts

<u>Transfer</u>

Items to Previously Marked Library

Items to Previously Marked Call Number

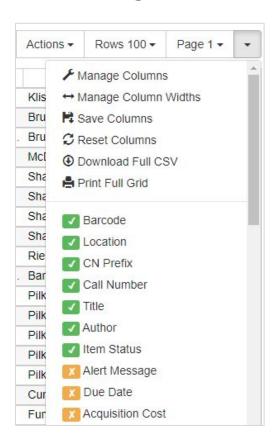
Sort and Select

Item Status

						III II II II Actions	- Itows It	ou lage i
#	Status	Barcode	Location	CN Prefix	Call Number	Items	nor	Item Status
1		31458003836726	Children's Summer	J	Klise	Show		Available
2		31458003993642	Children's Summer	J	Bruel	Triggered Events		Checked out
3		31458003845214	Children's Summer	J	Bruel	Item Holds		Available
4		31458003581538	Children's Summer	J	McDonald	Record Holds	Megan.	Available
5		31458003974907	Children's Summer	JE Reader	Sharmat	Print Labels	farjorie	Available
6		31458003974915	Children's Summer	JE Reader	Sharmat	Originating Acquisition	1arjorie	Available
7		31458003974923	Children's Summer	JE Reader	Sharmat	Mark	farjorie	Available
8		31458003974980	Children's Summer	JE Reader	Sharmat	Item as Damaged	1arjorie	Available
9		31458003728204	Children's Picture B	JE	Ries	Item as Discard/Weed		Available
10		31458003816314	Children's Graphic	J Graphic	Manga math myster	Item as Missing	_ydia.	Available
11		31458004203637	Children's Graphic	J Graphic	Dog Man	Add	1966-	Checked out
12		31458004203645	Children's Graphic	J Graphic	Dog Man	Items	1966-	Checked out
13		31458004218098	Children's Graphic	J Graphic	Dog Man	Call Numbers and Items	1966-	Checked out
14		31458004218106	Children's Graphic	J Graphic	Dog Man	Item Alerts	1966-	Checked out
15		31458004218114	Children's Graphic	J Graphic	Dog Man	Edit	1966-	Checked out
16		31458002803644	Children's Fiction	J	Curtis	Call Numbers	istopher	Available
17		31458003967430	Children's Fiction	J	Funke	Items	nelia Ca	Available
18		31458004029032	Children's Fiction	J	Hannan	Call Numbers and Items	eter	Available
19		31458003913160	Children's Fiction	J	Heede	Replace Barcodes	via Vand	. Available
20		31458004036508	Children's Fiction	J	Quinn	Manage Item Alerts	encer	Available

Actions - Rows 100 - Page 1 -

Configure the Grid, Download and Print



Configure which columns appear, column order and sorting, width, etc. Be sure to **Save Columns** if you want your changes to be the new default.

Print Full Grid to print the list as a table

Download Full CSV to open in Excel, Google Sheets, etc., for more advanced formatting and analysis.

Either of these options will take the current sort and column settings, so it may be worth adjusting these for a particular project

Use the Print Button

The following items have been examined:

 Title: 20,000 leagues under the sea Barcode: 31392005422922

2. Title: 20,000 leagues under the sea

3. Title: 31-day food revolution : heal your body, feel great, and transform your world

Barcode: 31392005611375 4. Title: 47 meters down Barcode: 31392005441807

Barcode: 31392005541325

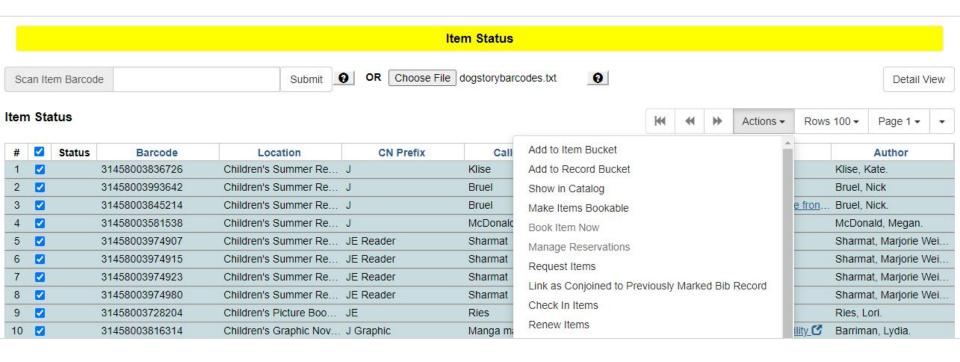
Item Status has a **Print** button below the grid which will print data from the batch of items using the content and formatting from the **Item Status** receipt template.

2. Item Buckets: When a Batch Just Isn't Enough

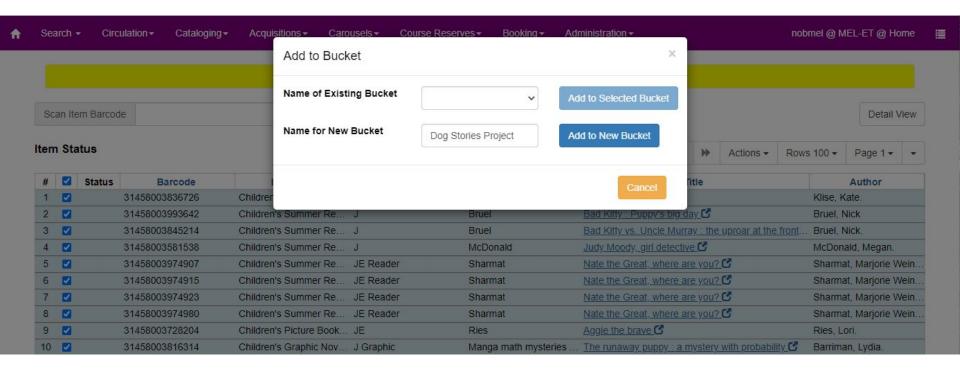
- The batch lives in the moment, disappears when you close tab
- Not good for ongoing projects or projects where the items might need to be changed back, or where another staff member needs to look at the list
- The solution? **Item Buckets** -- groups of items that stay on the system as long as you want, can be shared with other staff
- Item buckets remain on the system, associated with your login, until you delete them

Move Items from Item Status Screen to an Item Bucket

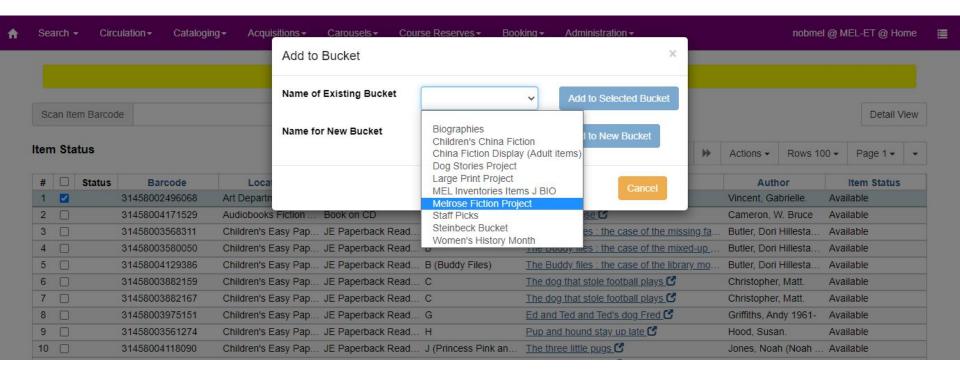
Select All and choose the **Add to Item Bucket** option in the **Actions** menu



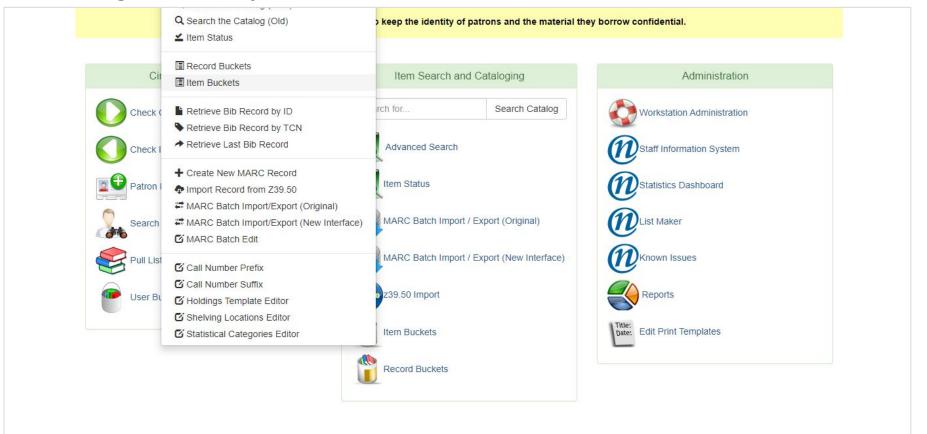
Add to a New Item Bucket



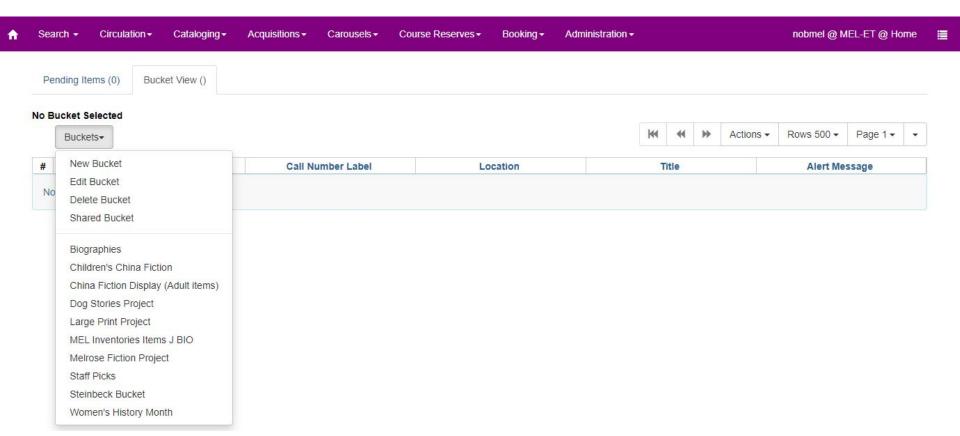
Add to an Existing Item Bucket



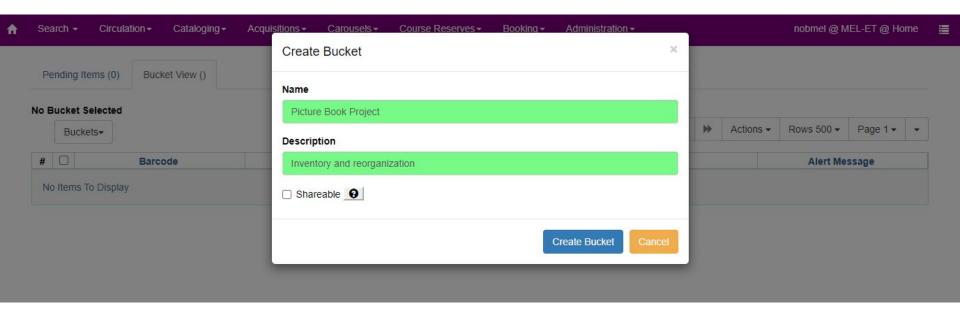
Going Directly to Item Buckets



Item Bucket Interface

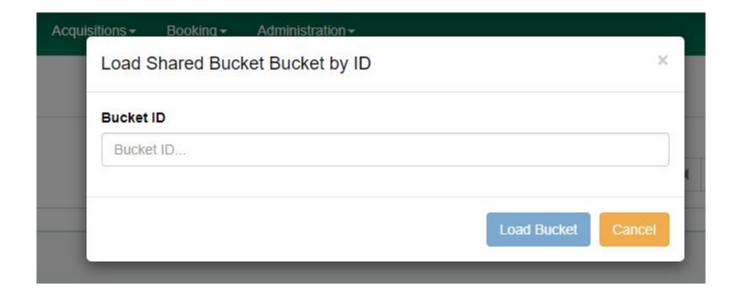


New Bucket



If you make a bucket Shareable, it can be accessed by any staff member. How this works is also dependent on how your system has the VIEW_CONTAINER permission set up

Open Shared Bucket

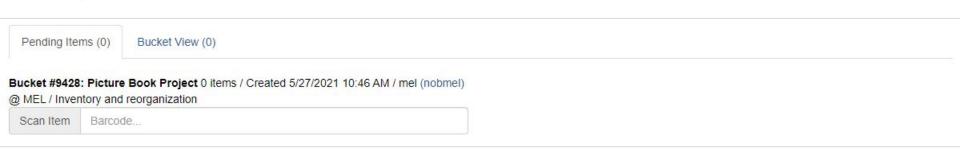


Adding Items to an Item Bucket

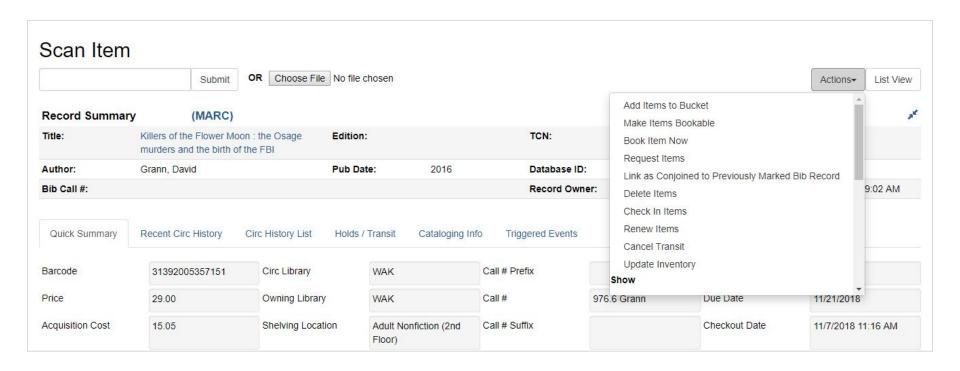
Item Bucket interface has two tabs, Bucket View and Pending Items



To add items, you have to go to the Pending Items tab, where you can scan barcodes, select them, and send them to the current bucket. Scanning barcodes is the only option, so if you want to upload or paste in files, you have to start in Item Status and then add the items to the bucket.

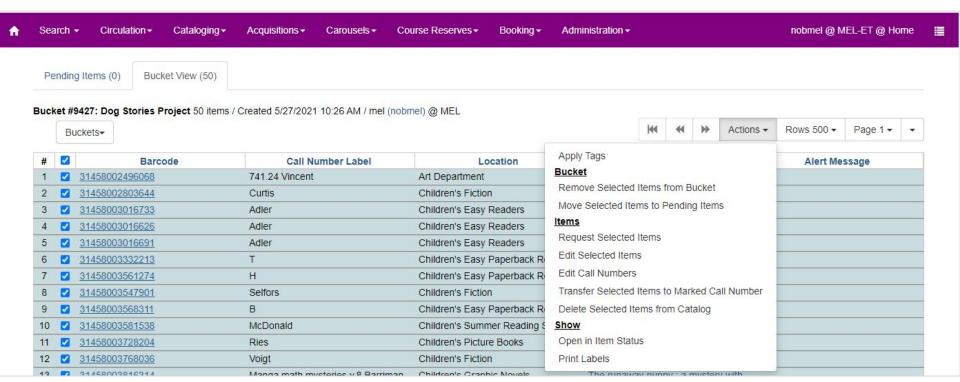


Add Item to Bucket from View Item Link



Select and Take Actions

Fewer actions here, but one of them will open in Item Status for more actions.



3. Baskets: Temporary Groups of Bibliographic Records

In both the public and staff catalog, baskets be used to place multiple holds on a batch of titles

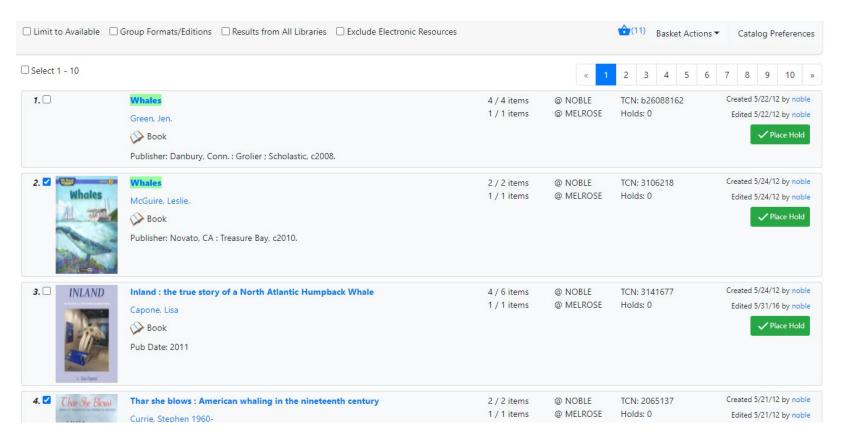
In the public catalog, the basket replaces temporary lists, and patrons have an option to move the basket to a new or existing My List

In the staff catalog, baskets can be used to select titles and move the records into a bucket

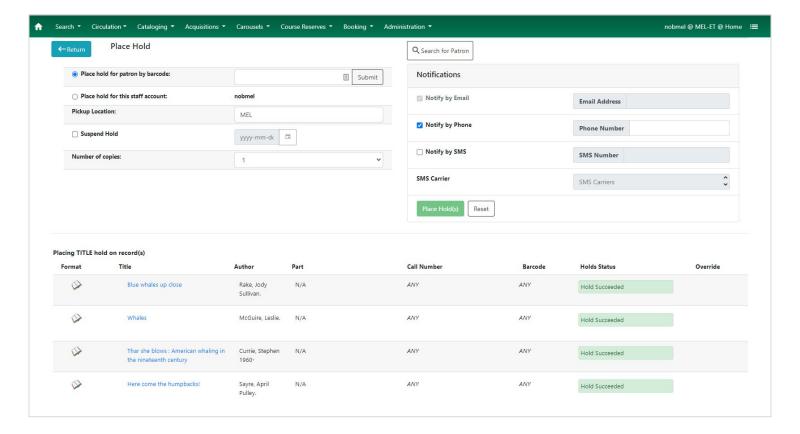
Be sure to clear the basket, especially when placing holds!

Records stay in baskets until they are cleared or the Evergreen session ends

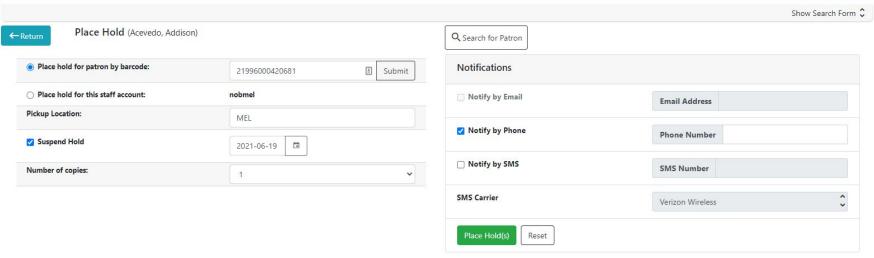
Selecting Titles in the New Staff Catalog



Placing Holds from a Basket







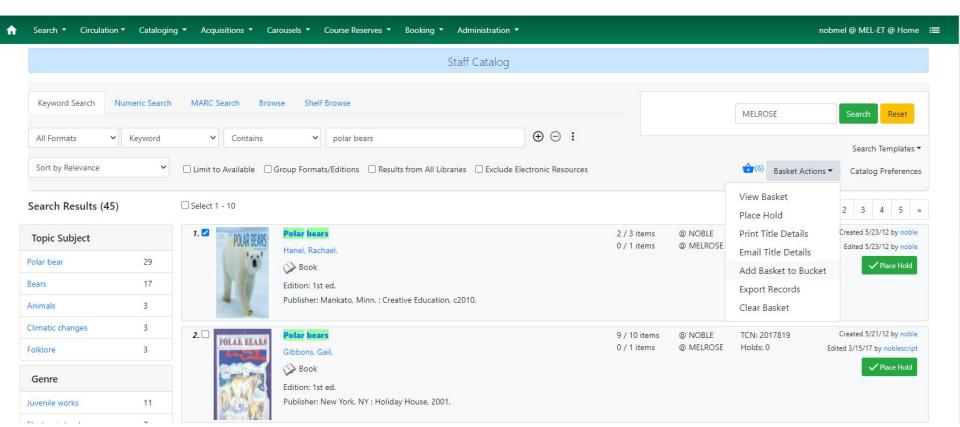
Title Format Author Part Call Number Barcode **Holds Status** Override 0 Blue whales up close Rake, Jody N/A ANY ANY Hold Pendina Sullivan. 0 Whales McGuire, Leslie. N/A ANY ANY Hold Pending 0 Thar she blows: American whaling in Currie, Stephen N/A ANY ANY Hold Pending the nineteenth century 1960-0 Here come the humpbacks! Sayre, April N/A ANY ANY Hold Pending Pulley.

Placing TITLE hold on record(s)

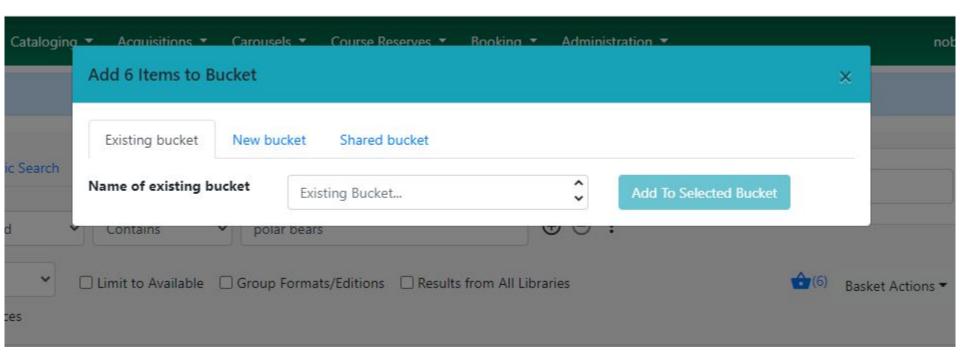
5. Record Buckets

- Persistent containers for bibliographic records
- Stay on the system associated with your account until you delete them
- Useful for multiple purposes including merging duplicate bib records, batch edit and building carousels
- Also have a search feature

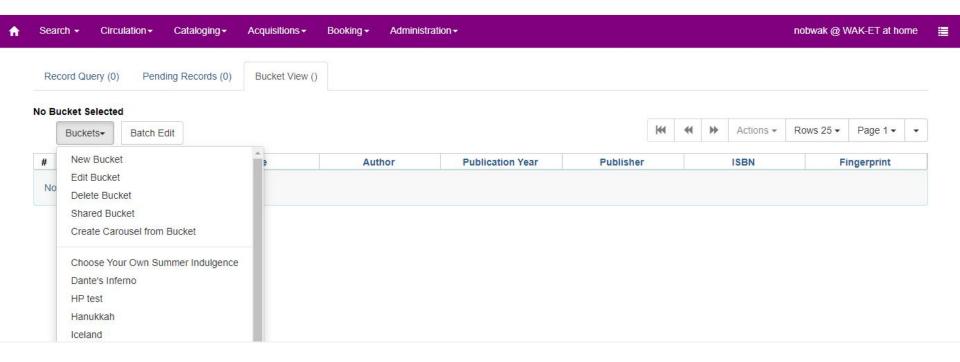
Add Basket to Bucket



Add Basket to Bucket

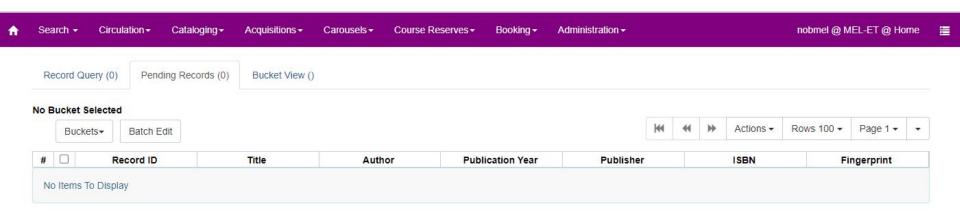


Record Bucket Interface

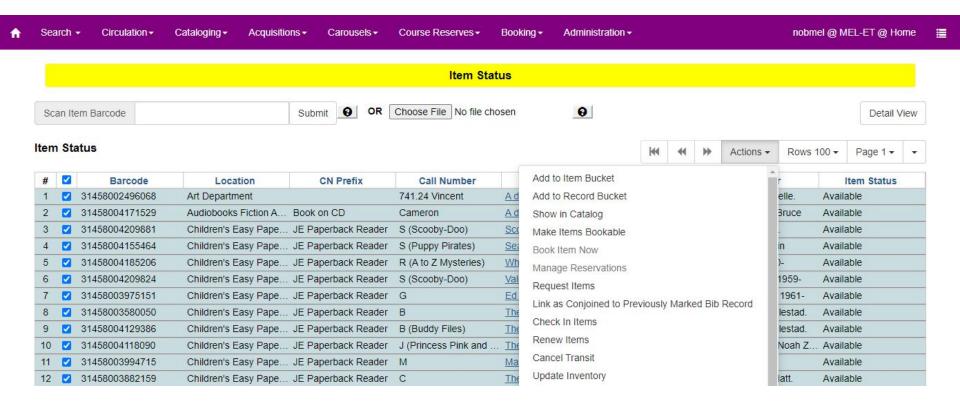


Record Bucket Interface

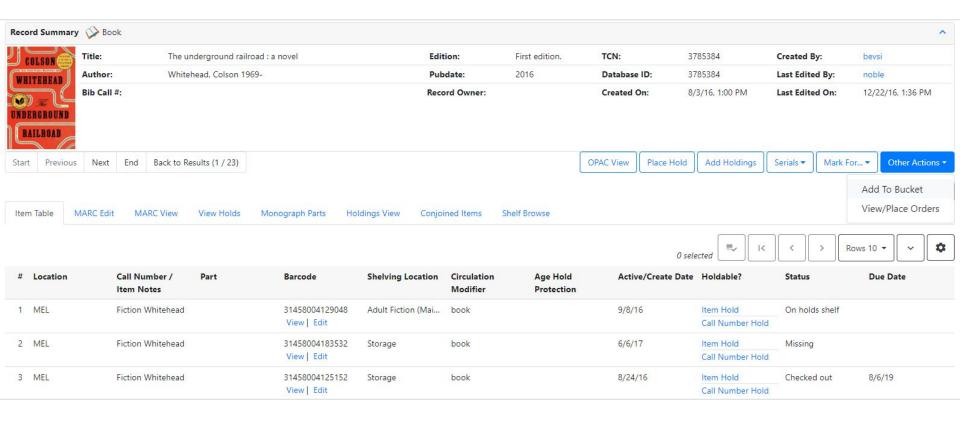
Bucket and Pending tabs don't have any options for adding bibs to the bucket



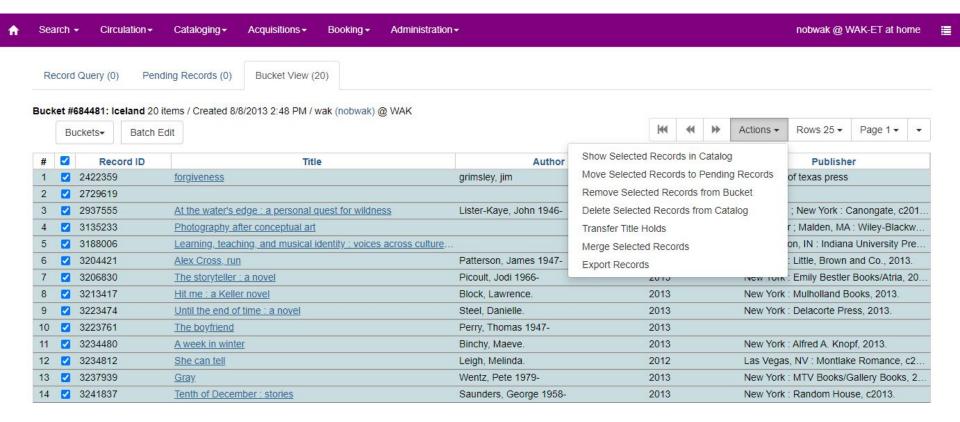
But You Can Add Items to a Record Bucket from Item Status



You Can Also Add to Bucket Directly from the Bib Record



Actions for Selected Records



Merge Records

Merge records?

```
Choose merge profile
                                       •
Lead record
                                                                                     Records to merge into lead
        Edit using full editor
                                                                                                        Remove from consideration
 Edit
                                                                                       Use as lead record
 =LDR 01297cam a22003498a 4500
                                                                                       =LDR 01297cam a22003498a 4500
 =001 4270415
                                                                                       =001 3171441
 =003 NOBLE
                                                                                       =003 NOBLE
 =005 20190425144121.0
                                                                                       =005 20140902161441.0
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                                    000 1 eng
                                                                                      =008 111026s2012\ nvu
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 =082 00$a813/.6$223
                                                                                       =043 \\$an-us-mo
 =100 1\$aFlynn, Gillian,$d1971-
                                                                                       =050 00$aPS3606.L935$bG66 2012
 =245 10$aGone girl :$ba novel /$cGillian Flynn.
                                                                                      =082 00$a813/.6$223
 =250 \\$a1st ed.
                                                                                      =100 1\$aFlynn, Gillian,$d1971-
 =260 \\$aNew York :$bCrown,$c2012.
                                                                                       =245 10$aGone girl :$ba novel /$cGillian Flynn.
 =300 \\$a419 p. ;$c24 cm.
                                                                                      =250 \\$a1st ed.
 =520 \\$aGone Girl's toxic mix of sharp-edged wit with deliciously chilling pr
                                                                                      =260 \\$aNew York :$bCrown,$c2012.
 =650 \0$aHusbands$vFiction.
                                                                                       =300 \\$a419 p. ;$c24 cm.
 =650 \0$aMarried people$vFiction.
                                                                                       =520 \\$aGone Girl's toxic mix of sharp-edged wit with deliciously chilling pr
```

Record Query (Watch for Record Limit)

1034482

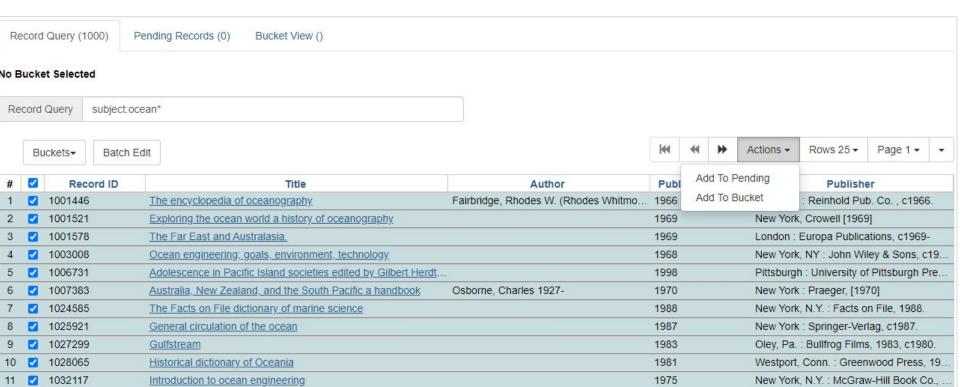
1036137

1036154

The last frontiers.

Man and the marine environment

Man and the sea: classic accounts of marine explorations



Garden City, N.Y., Doubleday [1973, c1...

Garden City, N.Y.: published for the Am ...

Boca Raton, Fla.: CRC Press, c1983.

1971

1983

1970

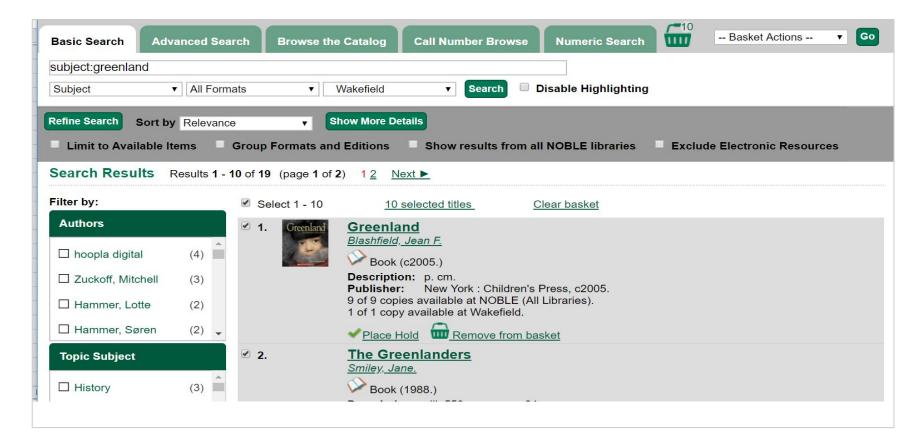
Record Query

- Can search author, title, subject, keyword
- Can limit to items owned or licensed to your library (using located URIs) and library shortname
- You can use Boolean operators (&& for AND, || = OR)
- You can move records to bucket or download CSV

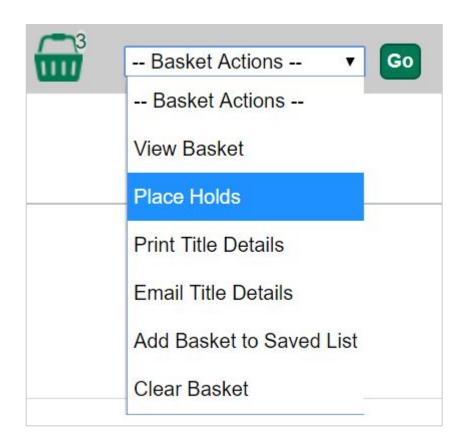
Examples:

- autis*
- subject:ocean* site:WAKEFIELD
- subject:christmas (netherlands || dutch || holland)
- ((learning || reading) && (disab* || difference* || difficult*)) || dyslexia

Baskets for Patrons



Patrons Use Baskets to Place Batch Holds



Baskets replace the temporary list for patrons

Place Hold

Nothing on Earth.

First light [downloadable e-book] / Rebecca Stead.

Greenland / by Jean F. Blashfield.

Pickup location: Wakefield

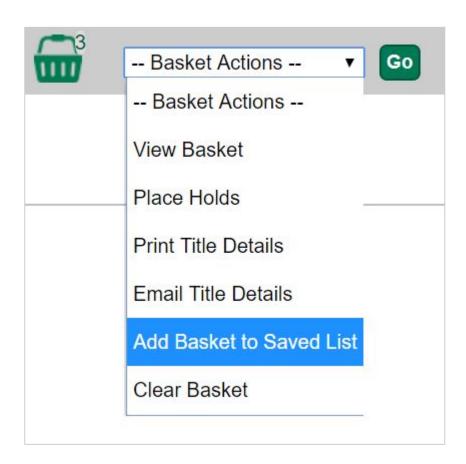
Notify when hold is ready for pickup?

Yes, by Email

The system will try to place a hold on all these titles, and will display a confirmation list showing which holds were successfully placed and which (like the ebook) were not available for holds

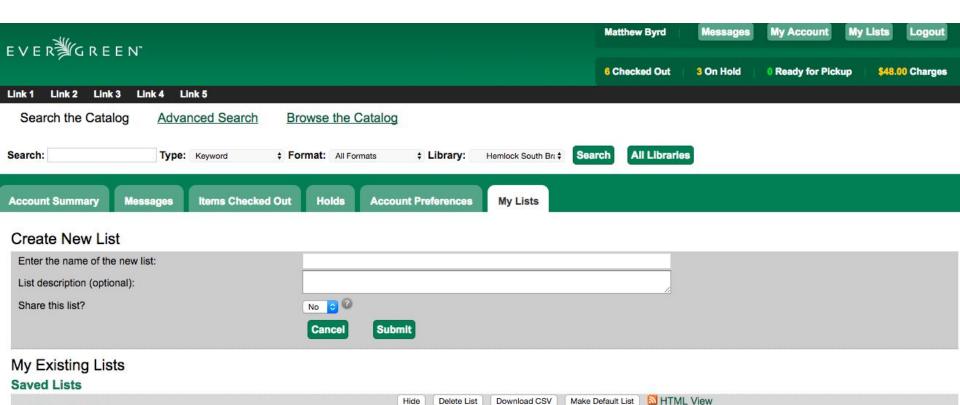
Add Basket to Saved List

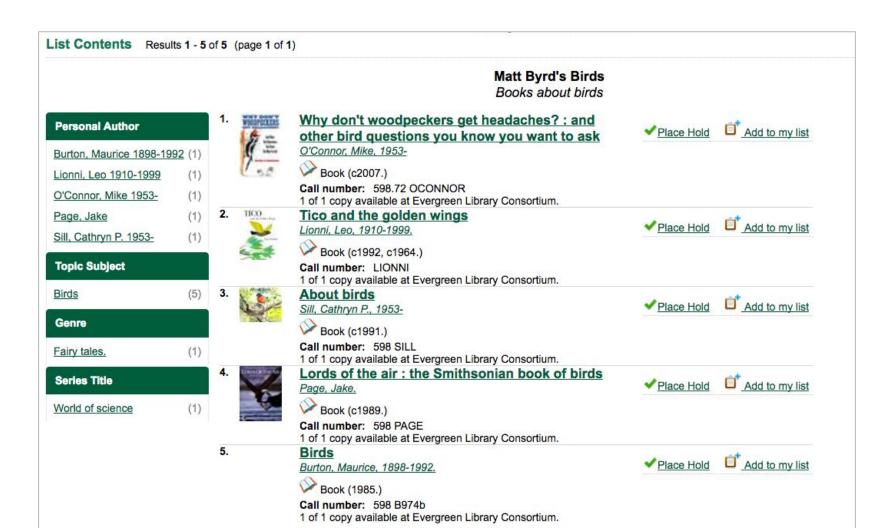
Can add to a new saved list or an existing list



My Lists in Public Catalog

Matt Byrd's Birds
Books about birds



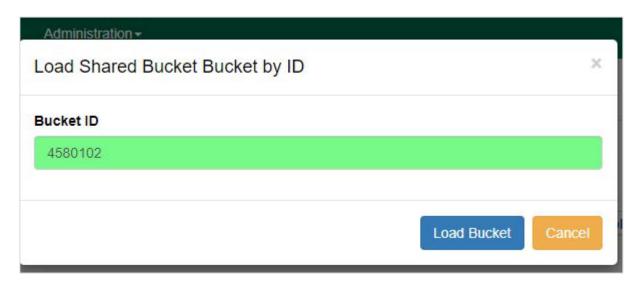


Opening My List as Bucket in Staff Web Client

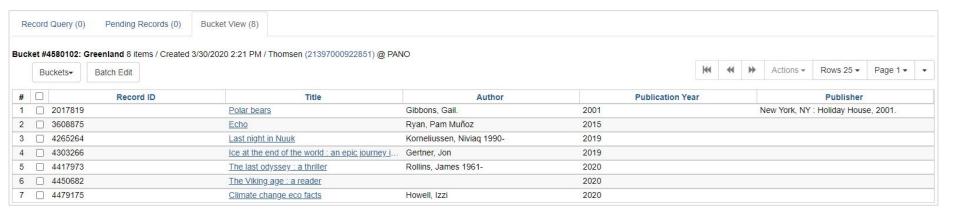
HTML link for public My List:

https://evergreen.noblenet.org/eg/opac/results?page=0;bookbag=4580102;depth=0;locg=1

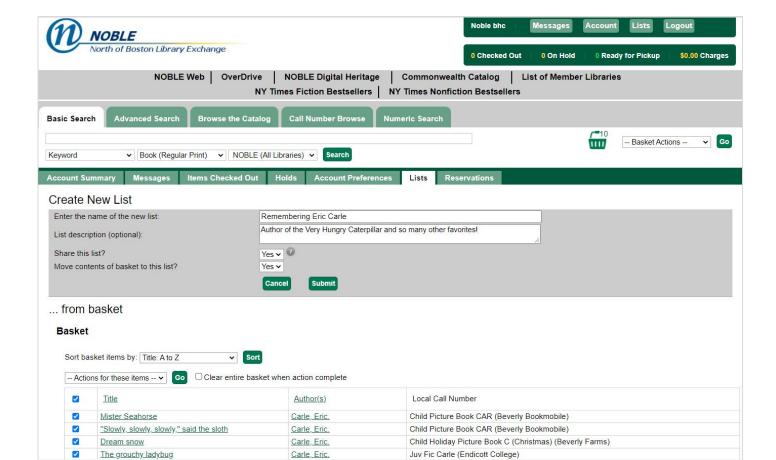
Use "Bookbag ID" to open as Shared Bucket

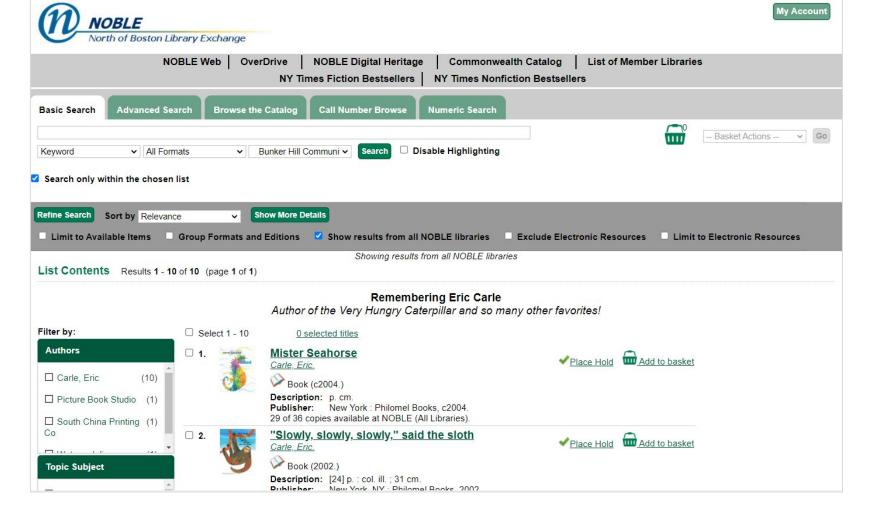


My List Opened as a Record Bucket



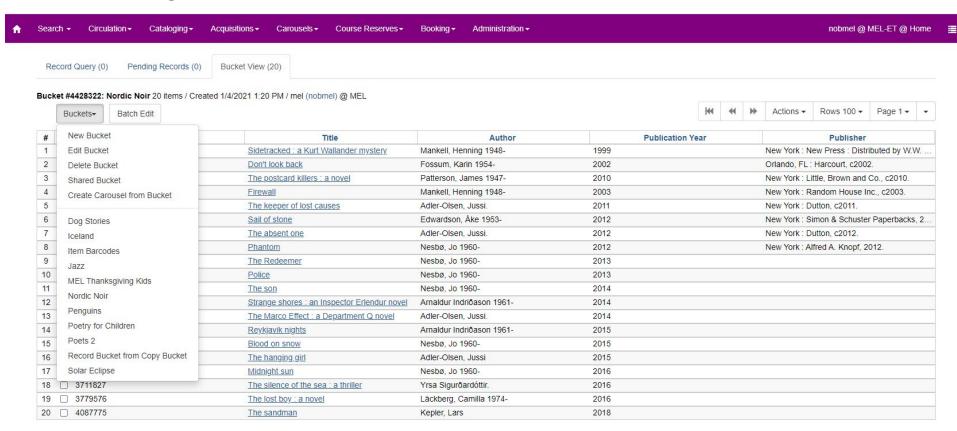
Staff Can Do This Too

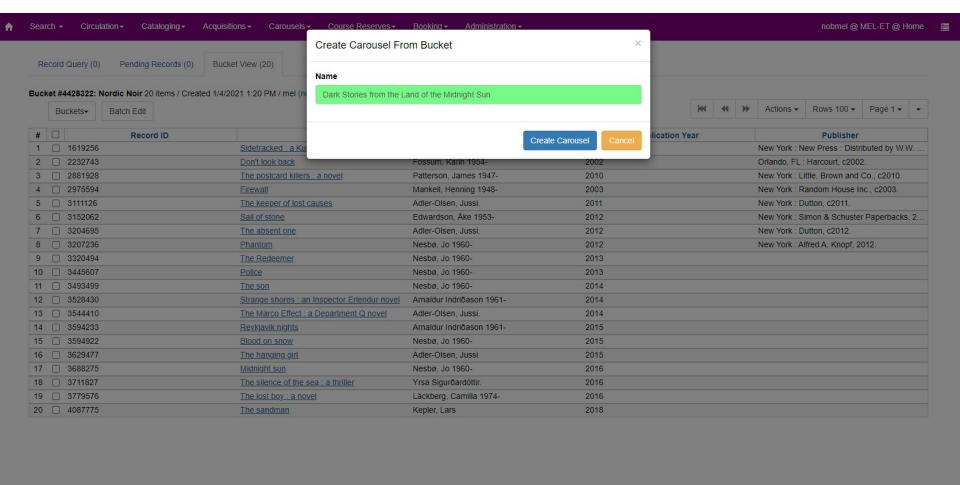




https://evergreen.noblenet.org/eg/opac/results?page=0;depth=0;locg=7;bookbag=4826380

Creating a Carousel from a Bucket





Carousel is Making a Copy of the Bucket

If you add or remove items from the bucket, the carousel won't reflect those changes.



For more on carousels, attend "Let's Take a Spin! Using Carousels in Your Library" next up in Track 2!

Summary

Item Records

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- 2. Item Buckets -- A persistent group of items, stays on system until the bucket is deleted

Bibliographic Records

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- 3. Bookbag (Also known as My Lists) -- the patron version of record buckets

Questions?

Elizabeth Thomsen

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