

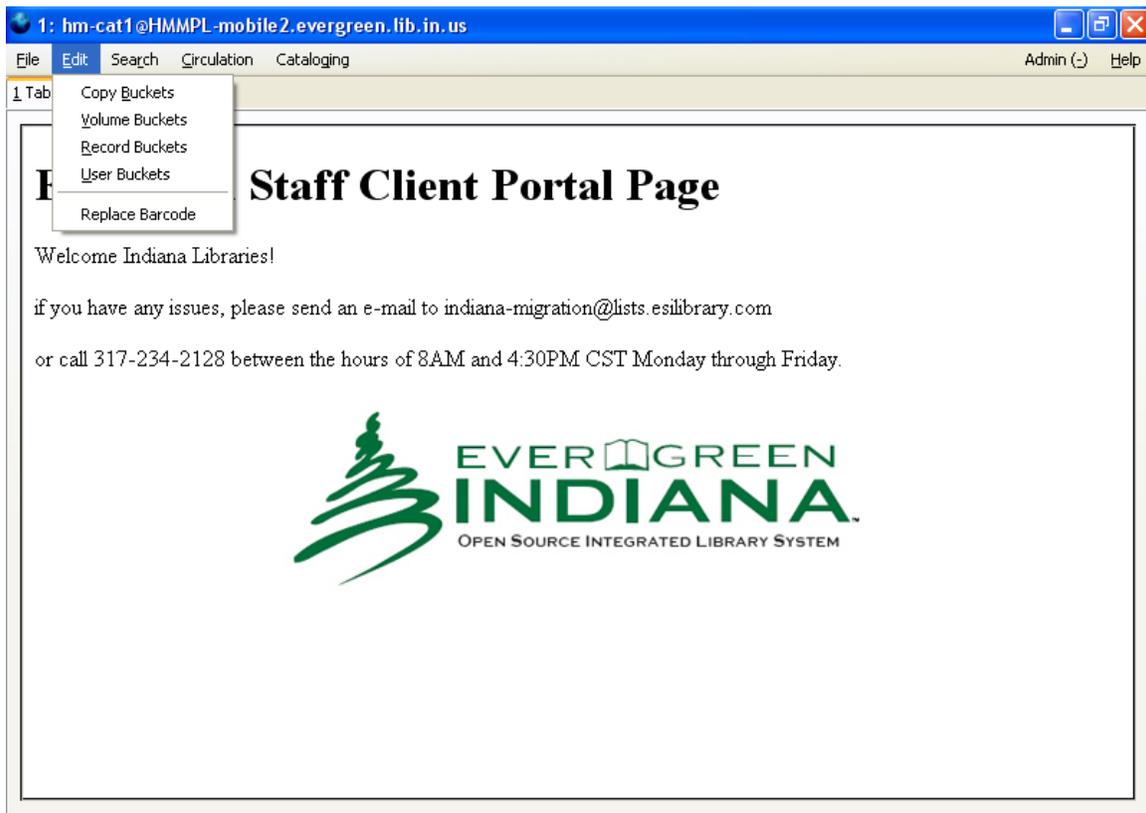
Chapter 17 -- Introduction to Buckets

Buckets are virtual “containers” to use in batch processing of item records. They can be used to perform various cataloging/holdings maintenance tasks in batch.

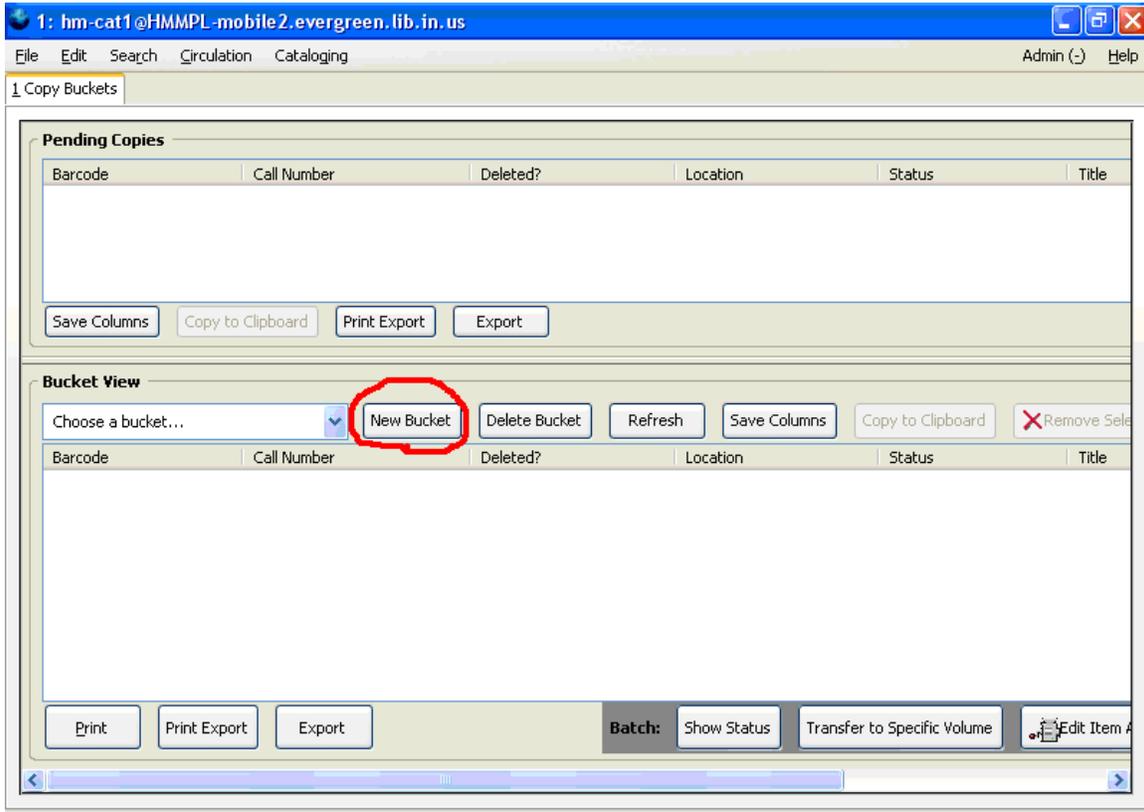
There are currently two different types of buckets used in cataloging, Copy Buckets and Record Buckets. Copy Buckets are used to manage copy or item information. For instance they may be used to change item location, circulation modifier, or status for multiple items. Record Buckets are used to manage bibliographic records, for instance they are used when merging records. Volume Buckets also appear in the menus, but these are in development and are currently not available. User Buckets are a circulation tool.

Creating New Buckets from the Bucket Manager

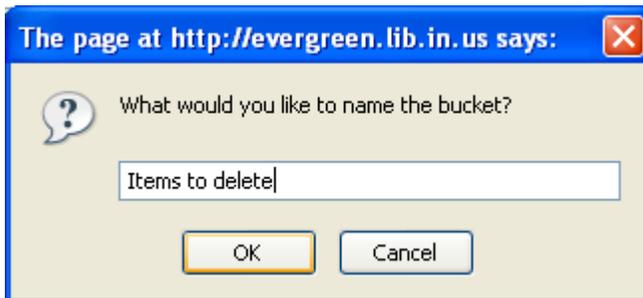
One way to create new buckets is from a Bucket Manager screen. There are separate screens for Record Buckets and Copy Buckets. These can both be accessed from the **Edit Menu (Alt + E)** and **Cataloging Menu (Alt + G)** on the toolbar.



To create a Copy Bucket, select **Copy Buckets (Alt + B)** to go to the Copy Bucket Manager. To create a Record Bucket, select **Record Buckets (Alt + R)** to go to the Record Bucket Manager. The tab will tell which Bucket Manager you are currently using. Here we are using the Copy Bucket Manager:

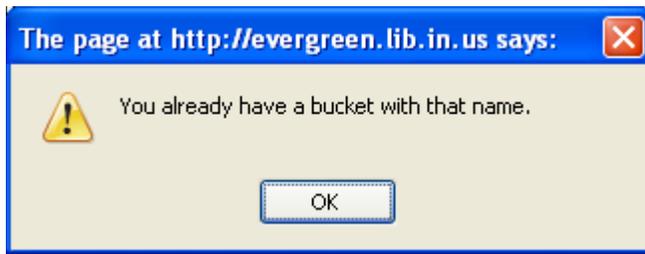


To create a New Bucket, click the **New Bucket** button. A dialog box will pop up:

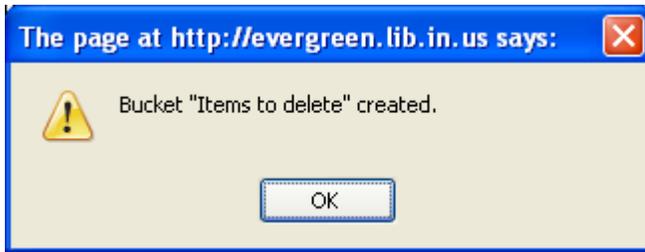


Enter a unique, descriptive name for your bucket here, and click **OK** or press **Enter**.

If you already have a bucket of that type with that name, an error message will pop up:



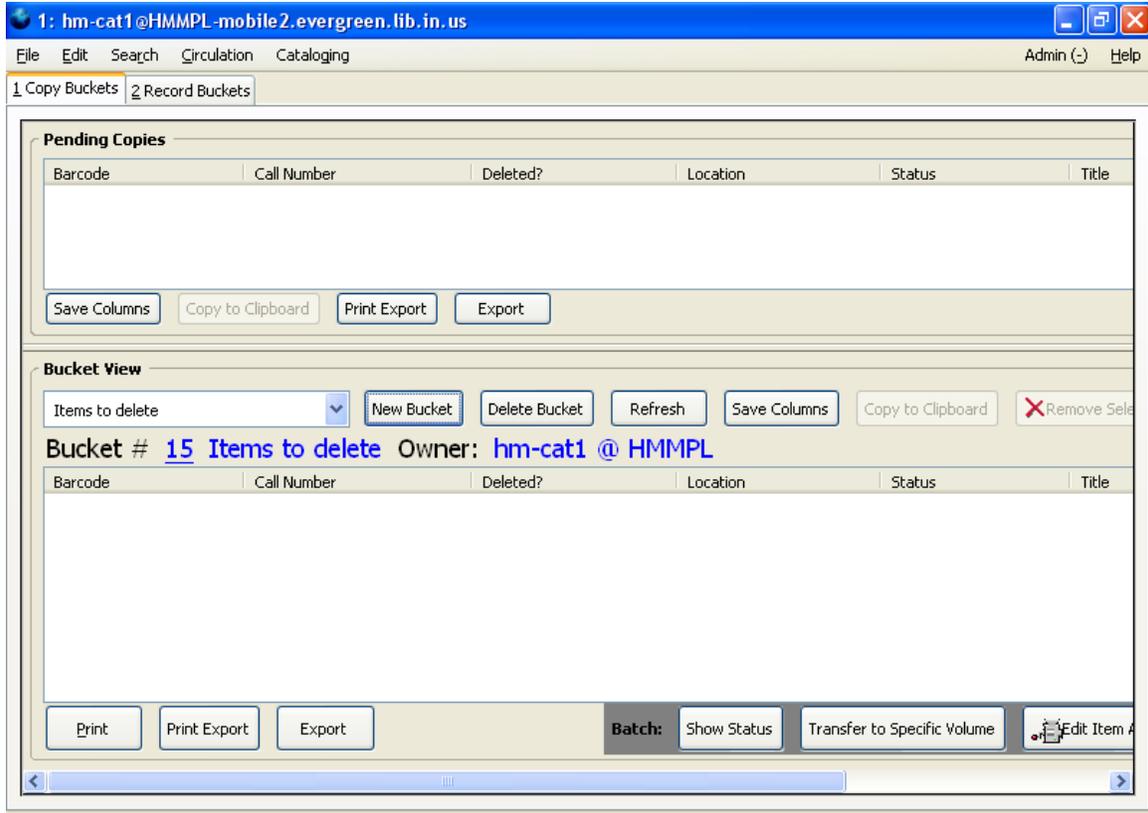
The bucket names are case-sensitive, so you could have buckets named To Be Withdrawn and To be withdrawn. You can also have a Record Bucket and a Copy Bucket with the same name.



If the bucket name is new, a dialog box pops up to tell you your bucket has been created. Click **OK** or press **Enter**.

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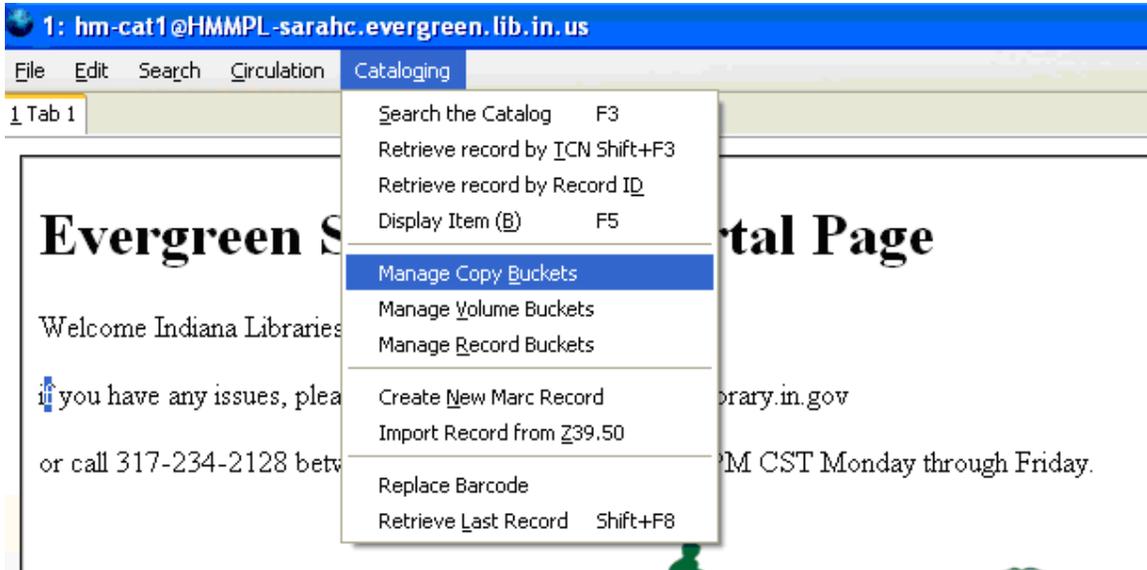
Chapter 17 – Introduction to Buckets



Your bucket name and bucket number will appear on the screen, seen here in blue.

Viewing Buckets from the Bucket Manager

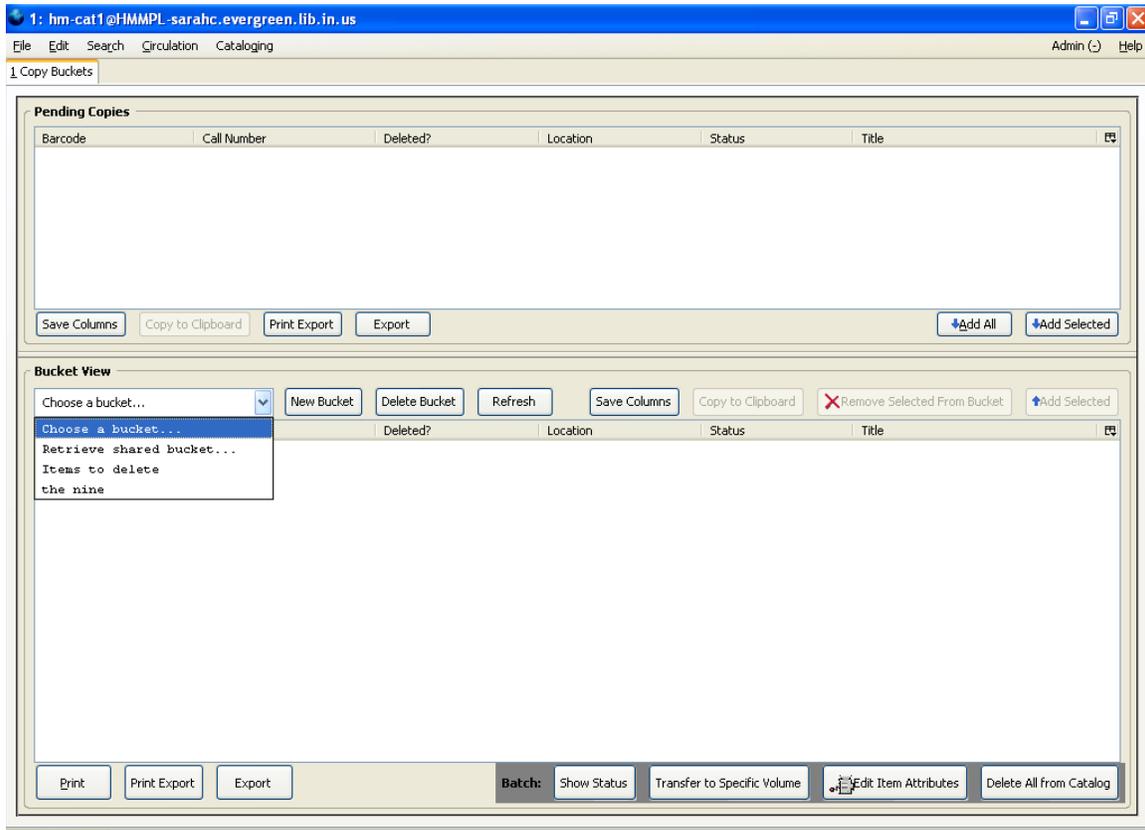
To view a bucket you've already created, open the appropriate Bucket Manager. These can be accessed from the **Edit Menu (Alt + E)** or **Cataloging Menu (Alt + G)** on the toolbar. Select **Record Buckets (Alt + R)** to view a record bucket, and **Copy Buckets (Alt + B)** to view a copy bucket. Note that from the cataloging menu you will need to press B twice because another command on the menu is also Alt + B.



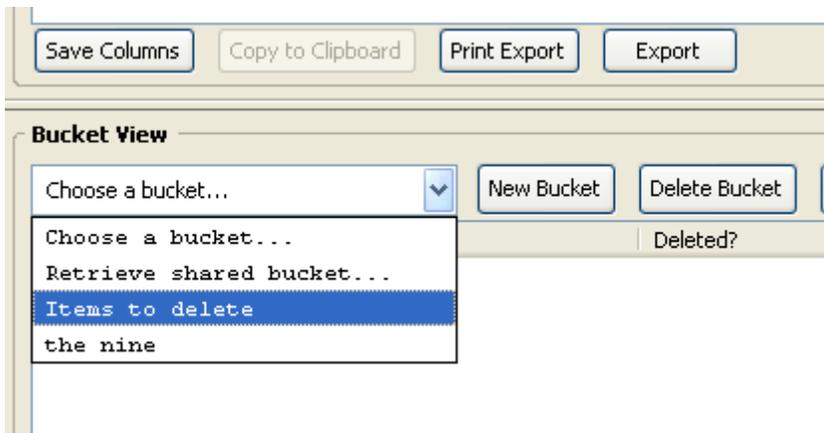
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To view your bucket, simply click on the drop down list labeled Choose a bucket as seen below:



Then select your bucket name from the list:



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Chapter 17 – Introduction to Buckets

Your bucket name will be displayed in blue, and the contents of your bucket, if any, will display in the Bucket view area. If there are many items or record in the bucket, it may take several seconds for the bucket to display.

The screenshot shows the Evergreen cataloging software interface. At the top, the browser address bar displays "1: hm-cat1 @HMMPL-sarahc.evergreen.lib.in.us". Below the browser window, the software interface is visible. The "Pending Copies" window is open, showing a table with columns: Barcode, Call Number, Deleted?, Location, Status, and Title. Below this table are buttons for "Save Columns", "Copy to Clipboard", "Print Export", "Export", "Add All", and "Add Selected".

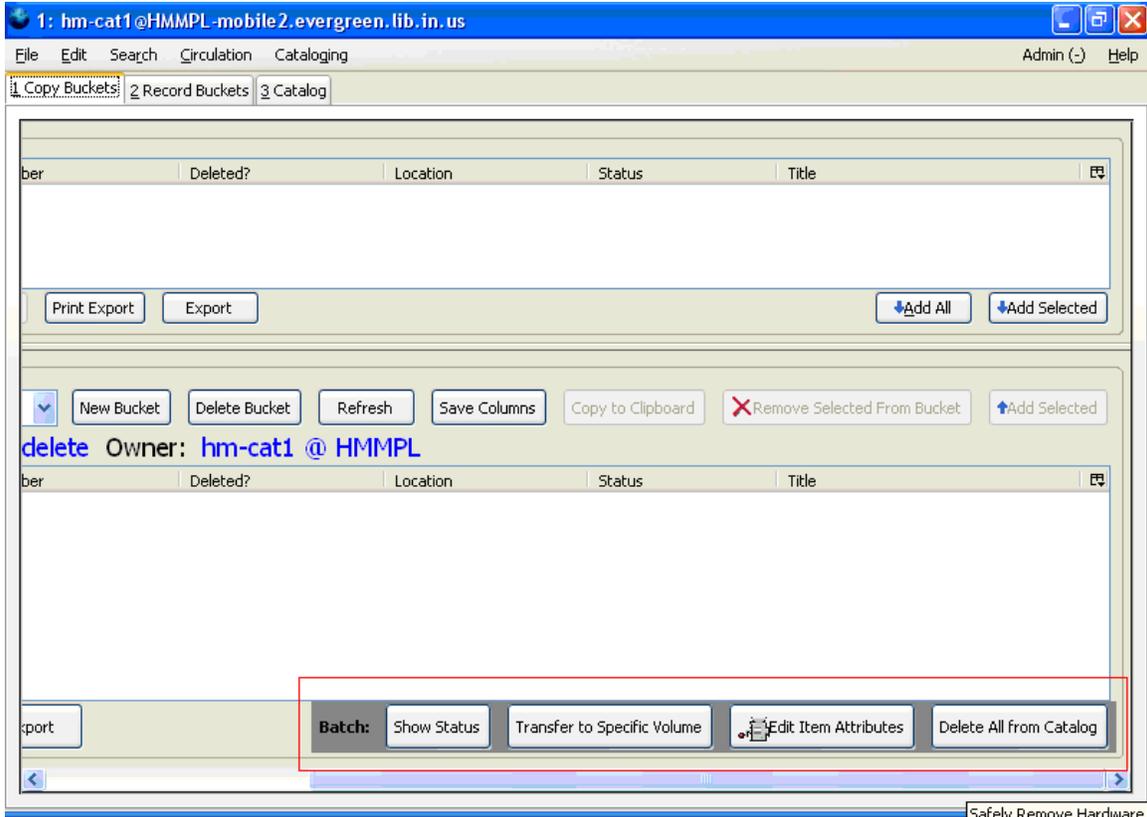
The "Bucket View" window is also open, showing a table with the same columns as the "Pending Copies" window. The bucket name "15 Items to delete" is highlighted in blue. Below the table are buttons for "Print", "Print Export", "Export", "Batch: Show Status", "Transfer to Specific Volume", "Edit Item Attributes", and "Delete All from Catalog".

Barcode	Call Number	Deleted?	Location	Status	Title
33946002043789	347.73 TOOBIN	No	Nonfiction . 2nd Floor	Available	The nine : inside the secret world of the S...
33946002043805	347.73 TOOBIN	No	Nonfiction . 2nd Floor	Discard/Weed	The nine : inside the secret world of the S...
33946002042484	347.73 TOOBIN	No	New Books . 2nd Floor	Available	The nine : inside the secret world of the S...
33946002042492	347.73 TOOBIN	Yes	Nonfiction . 2nd Floor	Discard/Weed	The nine : inside the secret world of the S...
33946002042500	347.73 TOOBIN	Yes	Nonfiction . 2nd Floor	Discard/Weed	The nine : inside the secret world of the S...
33946002042518	347.73 TOOBIN	Yes	Nonfiction . 2nd Floor	Discard/Weed	The nine : inside the secret world of the S...
33946002043623	347.73 TOOBIN	No	Nonfiction . 2nd Floor	Available	The nine : inside the secret world of the S...
33946002043219	347.73 TOOBIN	Yes	Nonfiction . 2nd Floor	Discard/Weed	The nine : inside the secret world of the S...
33946002043227	347.73 TOOBIN	No	New Books . 2nd Floor	Available	The nine : inside the secret world of the S...
33946002043235	347.73 TOOBIN	Yes	Nonfiction . 2nd Floor	Discard/Weed	The nine : inside the secret world of the S...
33946002043243	347.73 TOOBIN	Yes	Nonfiction . 2nd Floor	Discard/Weed	The nine : inside the secret world of the S...
33946002043268	347.73 TOOBIN	Yes	Nonfiction . 2nd Floor	Discard/Weed	The nine : inside the secret world of the S...
33946002043276	347.73 TOOBIN	Yes	Nonfiction . 2nd Floor	Discard/Weed	The nine : inside the secret world of the S...
33946002043284	347.73 TOOBIN	No	Nonfiction . 2nd Floor	Discard/Weed	The nine : inside the secret world of the S...
33946002043656	347.73 TOOBIN	No	Nonfiction . 2nd Floor	Checked out	The nine : inside the secret world of the S...

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Chapter 17 – Introduction to Buckets

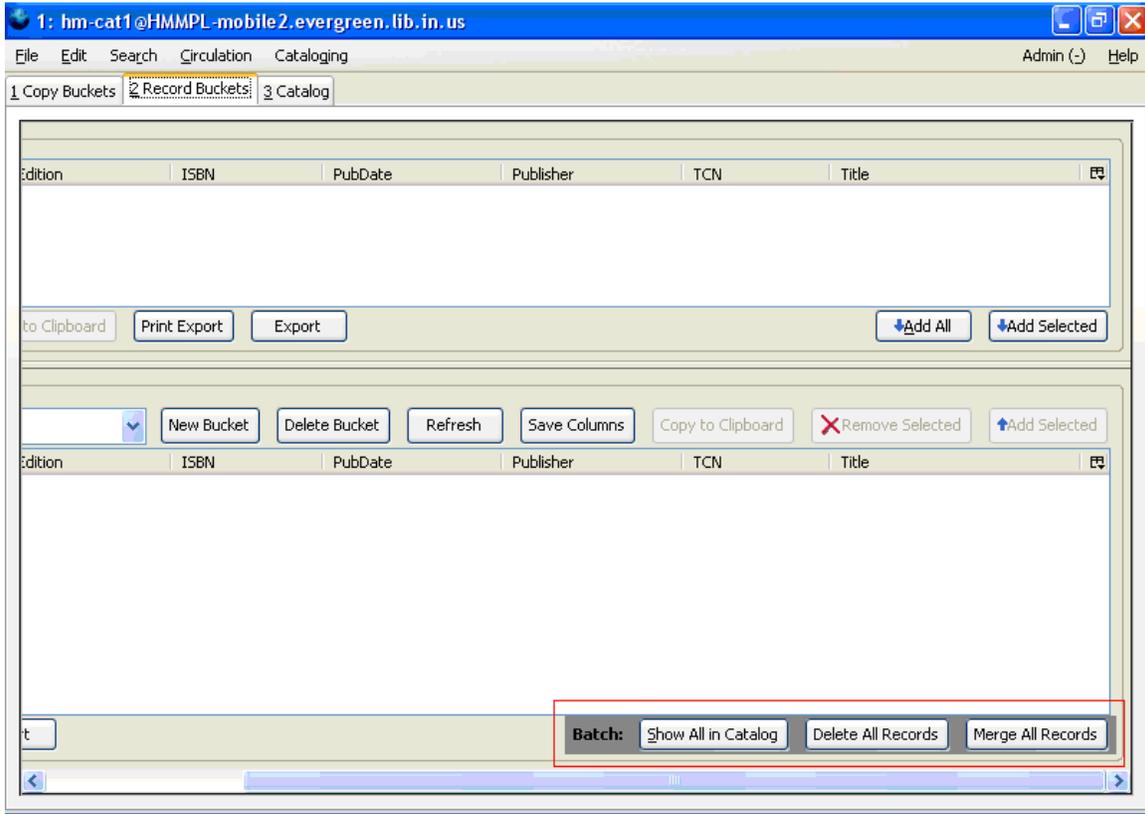
Note that different tools are available in the Record Bucket Manager and the Copy Bucket Manager. Copy Buckets cannot be opened in the Record Bucket Manager and vice versa. Note the tools in the Copy Bucket Manager in the bottom right hand corner of the screen below:



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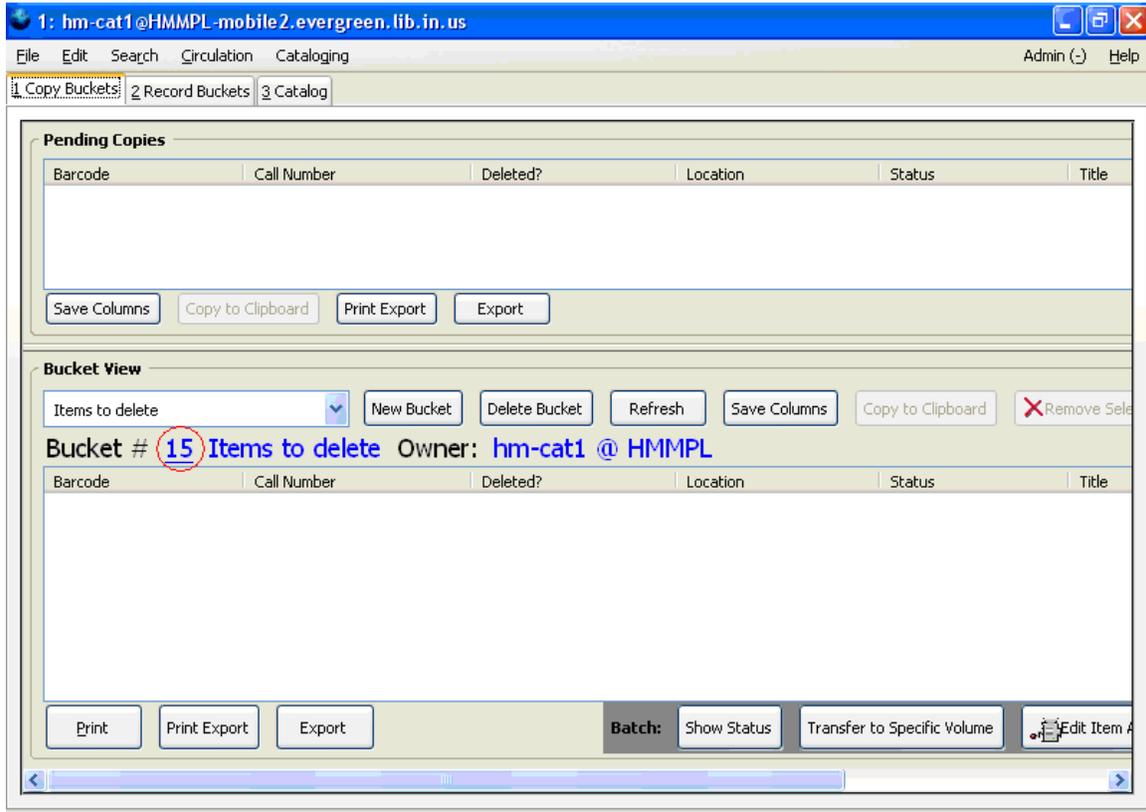
Chapter 17 – Introduction to Buckets

Here note the tool buttons in the Record Bucket screen:



Sharing Buckets

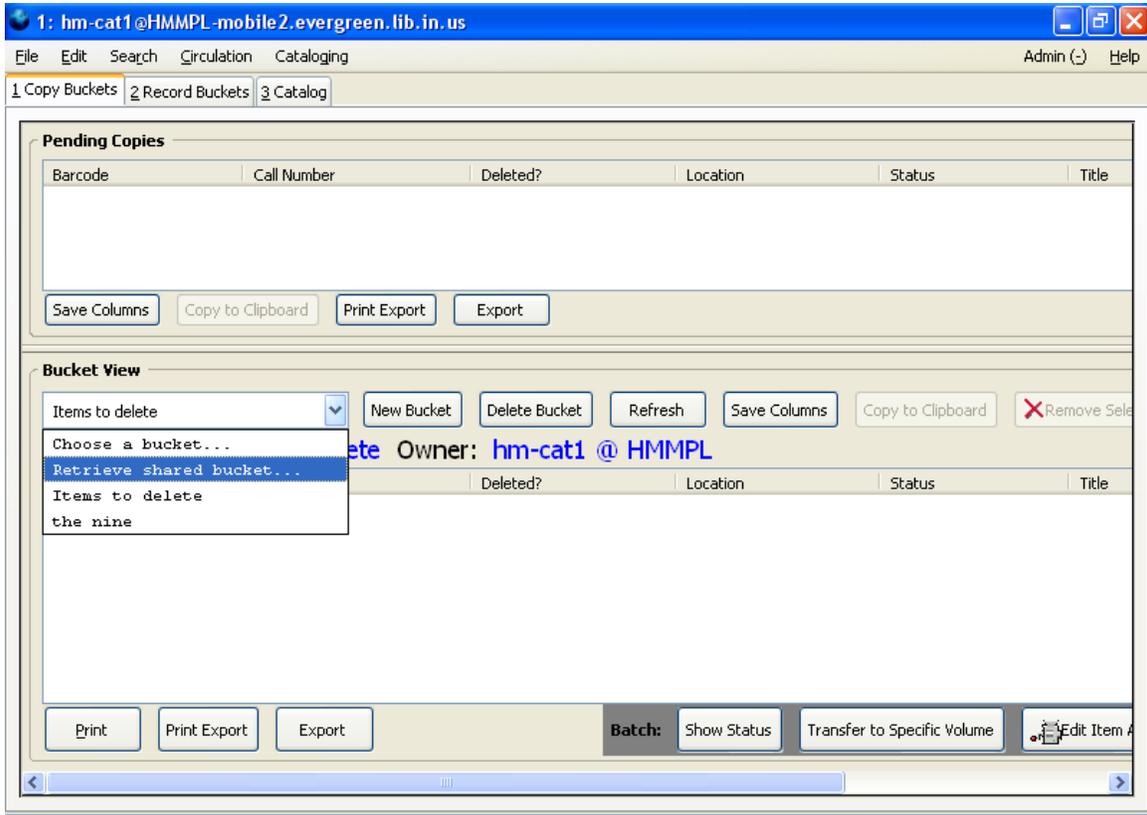
To view a bucket created by someone else, you must know the Bucket Number. The Bucket Number appears next to the Bucket Name in the Bucket Manager display.



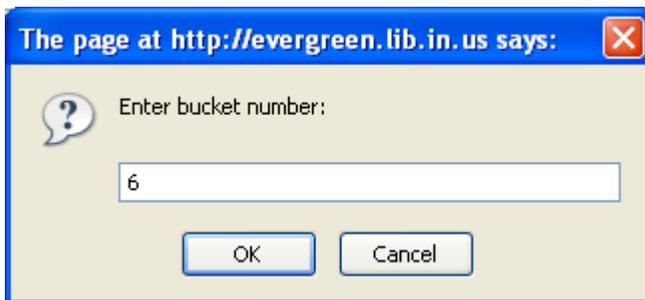
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To view the bucket, in the Bucket view drop down list, select **Retrieve shared Bucket**. It will be the second item on the list, regardless of how many buckets you have.



A dialog box will pop up, asking you to enter the Bucket Number.



Type the Bucket Number of the bucket you wish to view in the box, and click **OK** or press **Enter**.

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Chapter 17 – Introduction to Buckets

The Bucket Name and Number will be displayed, and the contents will appear in the window:

The screenshot shows a web browser window with the address bar displaying '1: hm-cat1@HMMPL-mobile2.evergreen.lib.in.us'. The browser has a menu bar with 'File', 'Edit', 'Search', 'Circulation', and 'Cataloging'. Below the menu bar are three tabs: '1 Copy Buckets', '2 Record Buckets', and '3 Catalog'. The main content area is divided into two sections. The top section is titled 'Pending Copies' and contains a table with columns: Barcode, Call Number, Deleted?, Location, Status, and Title. Below this table are buttons for 'Save Columns', 'Copy to Clipboard', 'Print Export', and 'Export'. The bottom section is titled 'Bucket View' and features a dropdown menu showing 'the nine'. To the right of the dropdown are buttons for 'New Bucket', 'Delete Bucket', 'Refresh', 'Save Columns', 'Copy to Clipboard', and 'Remove Selected'. Below these buttons, the text 'Bucket # 6 the nine Owner: hm-cat1 @ HMMPL' is displayed. A table follows with columns: Barcode, Call Number, Deleted?, Location, Status, and Title. The table contains seven rows of data. At the bottom of the bucket view are buttons for 'Print', 'Print Export', and 'Export'. To the right of these buttons is a 'Batch:' section with buttons for 'Show Status', 'Transfer to Specific Volume', and 'Edit Item A'.

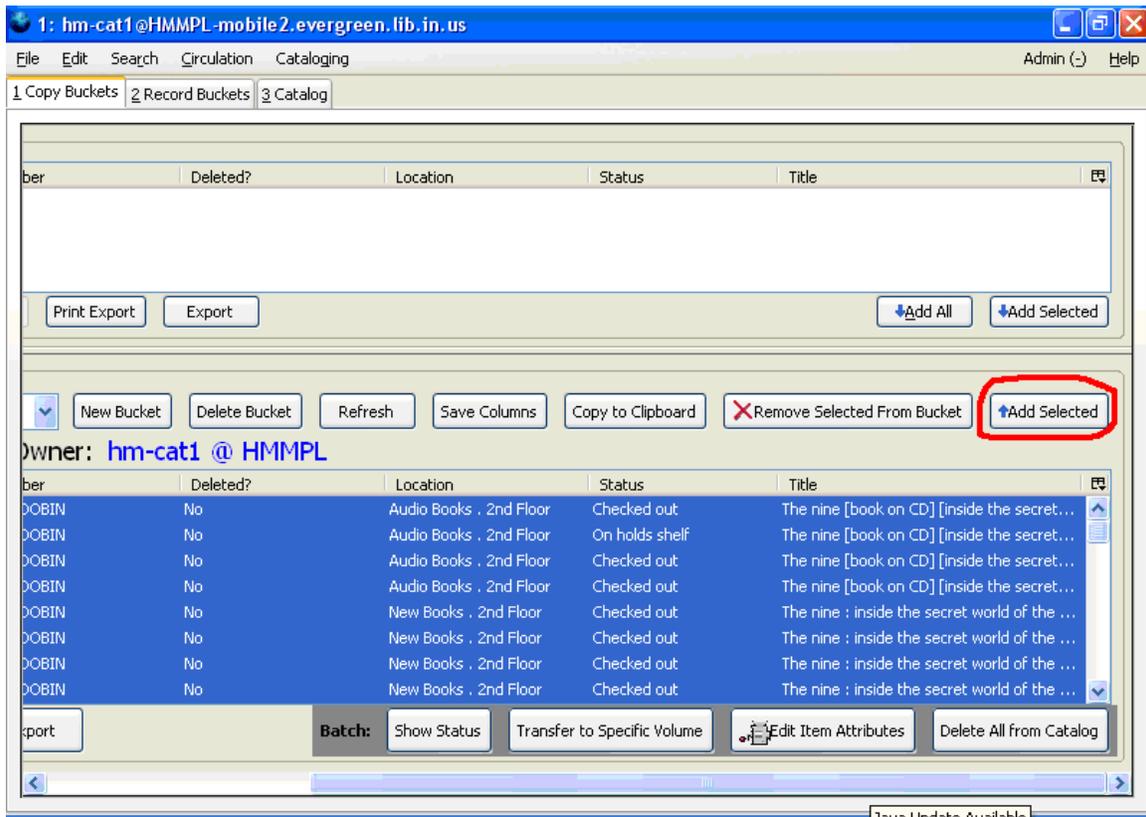
Barcode	Call Number	Deleted?	Location	Status	Title
33946002042526	347.73 TOOBIN	No	Audio Books . 2nd Floor	Checked out	The nine
33946002042534	347.73 TOOBIN	No	Audio Books . 2nd Floor	On holds shelf	The nine
33946002042542	347.73 TOOBIN	No	Audio Books . 2nd Floor	Checked out	The nine
33946002042559	347.73 TOOBIN	No	Audio Books . 2nd Floor	Checked out	The nine
33946002043763	347.73 TOOBIN	No	New Books . 2nd Floor	Checked out	The nine
33946002043649	347.73 TOOBIN	No	New Books . 2nd Floor	Checked out	The nine
33946002043631	347.73 TOOBIN	No	New Books . 2nd Floor	Checked out	The nine
33946002043615	347.73 TOOBIN	No	New Books . 2nd Floor	Checked out	The nine

You can perform actions from the toolbar at the bottom of the screen, but you cannot remove or add items to a bucket created by another user.

Copying Buckets

You can copy the contents of one bucket to another bucket. This is useful for shared buckets, since when you have copied the items from a shared bucket into your own bucket, you can delete and add items from your own bucket.

Open the bucket you wish to copy. Highlight the items from the bucket that you wish to move. If there are a lot of items in the bucket, you may need to scroll down on the right side of the screen to select them all. Then click Add Selected with the up arrow, on the far right side of the screen.



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Chapter 17 – Introduction to Buckets

The selected items will appear in the Pending area at the top of the screen. If there are many items in the bucket, this may take several seconds.

The screenshot shows a web browser window with the URL `1: hm-cat1@HMMPL-mobile2.evergreen.lib.in.us`. The interface includes a menu bar (File, Edit, Search, Circulation, Cataloging) and a navigation pane with tabs for Copy Buckets, Record Buckets, and Catalog. The main content area is divided into two sections:

Pending Copies

Barcode	Call Number	Deleted?	Location	Status	Title
33946002043789	347.73 TOOBIN	No	New Books . 2nd Floor	Checked out	The nine
33946002043805	347.73 TOOBIN	No	New Books . 2nd Floor	Checked out	The nine
33946002042484	347.73 TOOBIN	No	New Books . 2nd Floor	Checked out	The nine
33946002042492	347.73 TOOBIN	No	New Books . 2nd Floor	Checked out	The nine

Buttons below the table: Save Columns, Copy to Clipboard, Print Export, Export.

Bucket View

Search field: the nine. Buttons: New Bucket, Delete Bucket, Refresh, Save Columns, Copy to Clipboard, Remove Selected.

Bucket # 6 the nine Owner: hm-cat1 @ HMMPL

Barcode	Call Number	Deleted?	Location	Status	Title
33946002042526	347.73 TOOBIN	No	Audio Books . 2nd Floor	Checked out	The nine
33946002042534	347.73 TOOBIN	No	Audio Books . 2nd Floor	On holds shelf	The nine
33946002042542	347.73 TOOBIN	No	Audio Books . 2nd Floor	Checked out	The nine
33946002042559	347.73 TOOBIN	No	Audio Books . 2nd Floor	Checked out	The nine
33946002043763	347.73 TOOBIN	No	New Books . 2nd Floor	Checked out	The nine
33946002043649	347.73 TOOBIN	No	New Books . 2nd Floor	Checked out	The nine
33946002043631	347.73 TOOBIN	No	New Books . 2nd Floor	Checked out	The nine
33946002043615	347.73 TOOBIN	No	New Books . 2nd Floor	Checked out	The nine

Buttons below the table: Print, Print Export, Export. Batch: Show Status, Transfer to Specific Volume, Edit Item A

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Chapter 17 – Introduction to Buckets

Now open the bucket to which you wish to transfer the items. You may either select one of your own buckets or create a new bucket.

The screenshot shows a web browser window with the address bar displaying "1: hm-cat1@HMMPL-mobile2.evergreen.lib.in.us". The browser has a menu bar with "File", "Edit", "Search", "Circulation", "Cataloging", "Admin", and "Help". Below the menu bar are three tabs: "Copy Buckets", "Record Buckets", and "Catalog".

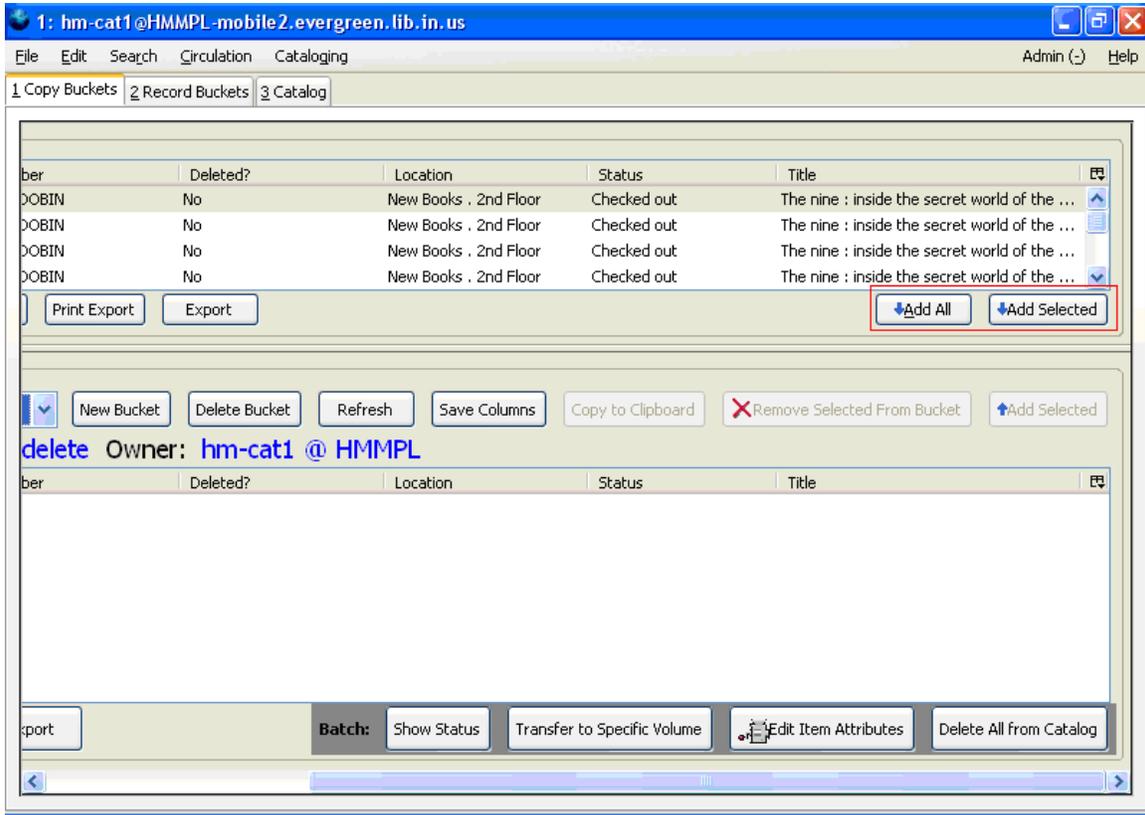
The main content area is divided into two sections:

- Pending Copies:** A table with columns: Barcode, Call Number, Deleted?, Location, Status, and Title. It contains four rows of data for items with call number 347.73 TOOBIN, all located at "New Books . 2nd Floor" and "Checked out". Below the table are buttons for "Save Columns", "Copy to Clipboard", "Print Export", and "Export".
- Bucket View:** A section with a dropdown menu set to "Items to delete". To its right are buttons for "New Bucket", "Delete Bucket", "Refresh", "Save Columns", "Copy to Clipboard", and "Remove Selected". Below these is the text "Bucket # 15 Items to delete Owner: hm-cat1 @ HMMPL". Underneath is an empty table with the same column headers as the "Pending Copies" table. At the bottom of this section are buttons for "Print", "Print Export", "Export", and a "Batch:" section with buttons for "Show Status", "Transfer to Specific Volume", and "Edit Item A".

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Chapter 17 – Introduction to Buckets

To add the items to your bucket you will either click **Add All** with the down arrow at the right side of the screen, or you will highlight the items you wish to add, and choose **Add Selected** with the down arrow.



The items will appear in your bucket at the bottom of the screen. If there are many items, this may take several seconds.

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Chapter 17 – Introduction to Buckets

The screenshot shows a web browser window with the address bar displaying '1: hm-cat1@HMMPL-mobile2.evergreen.lib.in.us'. The application interface includes a menu bar (File, Edit, Search, Circulation, Cataloging) and a toolbar with buttons for 'Copy Buckets', 'Record Buckets', and 'Catalog'. The main content area is divided into two sections:

Pending Copies

Barcode	Call Number	Deleted?	Location	Status	Title
33946002043789	347.73 TOOBIN	No	New Books . 2nd Floor	Checked out	The nine
33946002043805	347.73 TOOBIN	No	New Books . 2nd Floor	Checked out	The nine
33946002042484	347.73 TOOBIN	No	New Books . 2nd Floor	Checked out	The nine
33946002042492	347.73 TOOBIN	No	New Books . 2nd Floor	Checked out	The nine

Buttons below the table: Save Columns, Copy to Clipboard, Print Export, Export.

Bucket View

Items to delete: [dropdown] New Bucket Delete Bucket Refresh Save Columns Copy to Clipboard Remove Selected

Bucket # **15** Items to delete Owner: hm-cat1 @ HMMPL

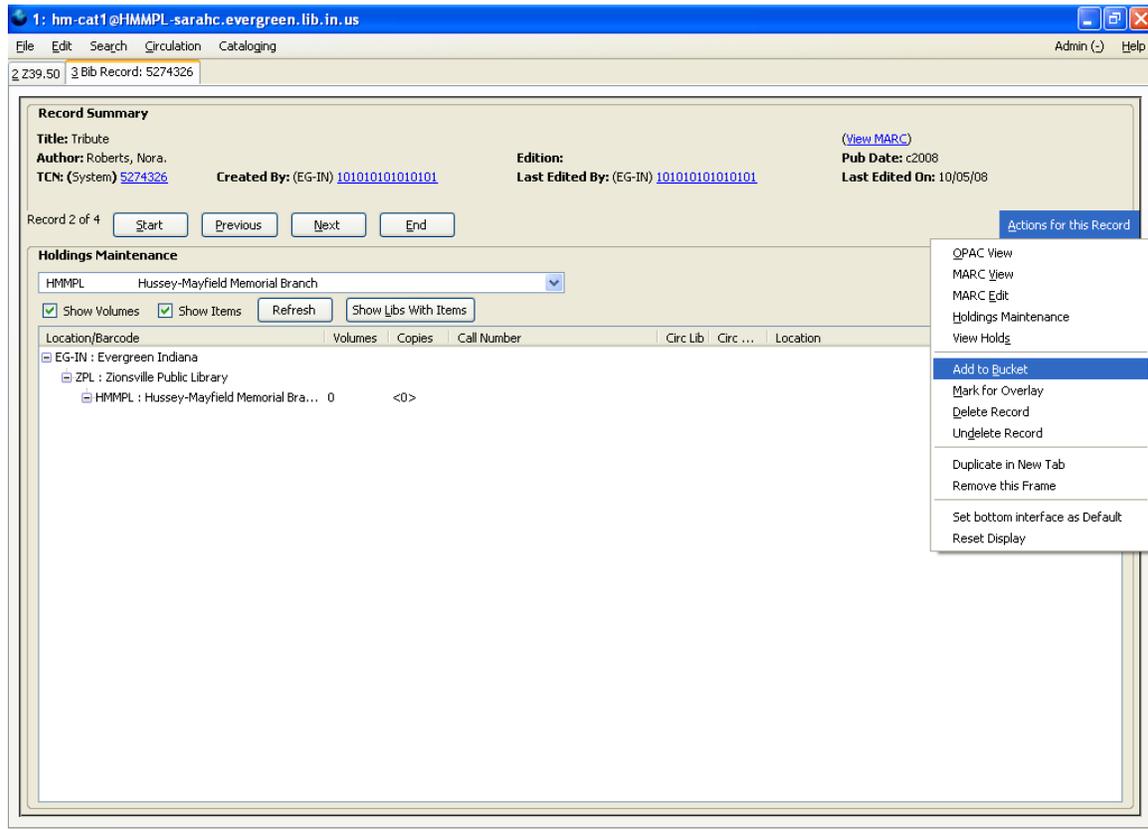
Barcode	Call Number	Deleted?	Location	Status	Title
33946002043789	347.73 TOOBIN	No	New Books . 2nd Floor	Checked out	The nine
33946002043805	347.73 TOOBIN	No	New Books . 2nd Floor	Checked out	The nine
33946002042484	347.73 TOOBIN	No	New Books . 2nd Floor	Checked out	The nine
33946002042492	347.73 TOOBIN	No	New Books . 2nd Floor	Checked out	The nine
33946002042500	347.73 TOOBIN	No	New Books . 2nd Floor	Checked out	The nine
33946002042518	347.73 TOOBIN	No	New Books . 2nd Floor	Checked out	The nine
33946002043623	347.73 TOOBIN	No	New Books . 2nd Floor	Checked out	The nine
33946002043219	347.73 TOOBIN	No	New Books . 2nd Floor	Available	The nine

Buttons below the table: Print, Print Export, Export. Batch: Show Status Transfer to Specific Volume Edit Item A

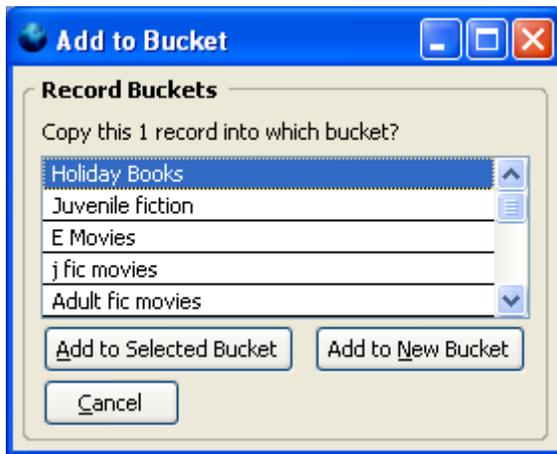
You have now copied the items to your bucket. These items have not been removed from the original bucket. If you have copied the bucket of another user, you may wish to notify them that you have done so. The user may wish to delete the original bucket or its contents, and he or she may need to know when you copied the bucket so that you can be notified if they make further changes to the original bucket contents.

Adding Records to Record Buckets

To add records to a record bucket, bring up the record you wish to add. Under **Actions for this Record (Alt +A)**, select **Add to Bucket (Alt +B)**.



The **Add to Bucket** window will pop up in the top left corner of your screen.

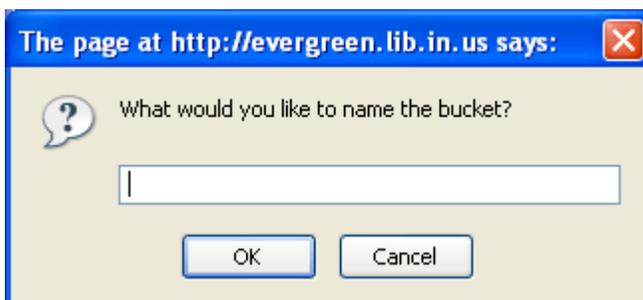


If you have created buckets before, they will appear here in a list as shown. To add an item to a bucket you have previously created, simply click on the bucket name to highlight it, and click **Add To Selected Bucket (Alt +A)**. The Add to Bucket box will disappear. Nothing else will appear to happen, but the record will be added to your bucket.

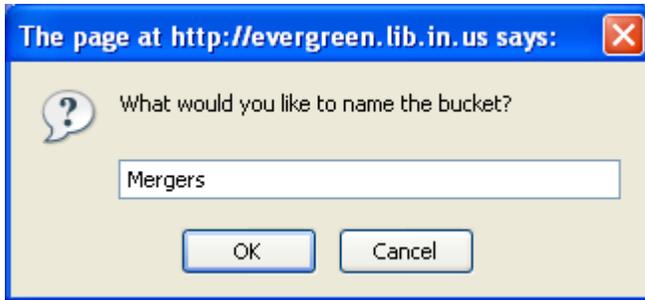
Creating New Buckets from Holdings Maintenance

If you have not created any buckets, the box where the bucket names appear will be empty, and you will need to create one. If you already have buckets, you may add another bucket at this point if desired.

To create a new bucket, rather than clicking Add to Selected Bucket, click **Add to New Bucket (Alt +N)**



A dialogue box will open on top of the Add to Bucket window. Enter a unique, descriptive name for your bucket here. If you already have a bucket with that name, an error message will pop up. The bucket names are case-sensitive, so you could have buckets named To Be Withdrawn and To be withdrawn.

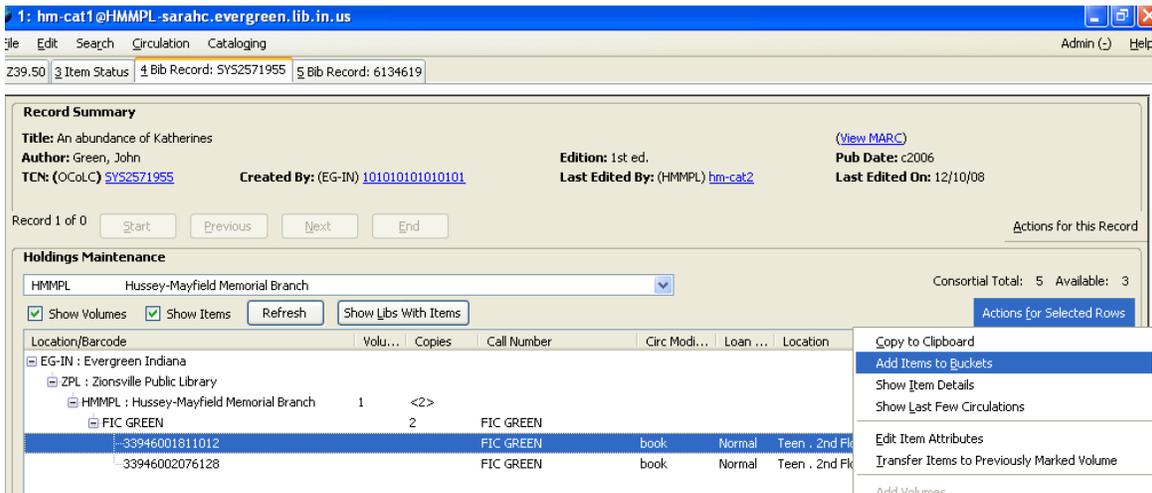


After you have typed your bucket name, click **OK** or hit **Enter**.

The dialog box and Add to Bucket Window will disappear. Nothing else will seem to happen, but the bucket will be created, and the record will be added to it.

Adding Items to Copy Buckets

To add items to item buckets from the Holdings Maintenance screen, highlight the Barcode line of the item you wish to add to the bucket. Under **Actions for Selected Rows (Alt + R)** and select **Add Items to Buckets (Alt + B)**.



A small window will open up at the top left hand corner of the screen:



At this point you can add items to the bucket or create a new bucket, just as you would do for a Record bucket. See ***Adding Records to Record Buckets***, page 17.18 and ***Creating New Buckets from Holdings Maintenance***, page 17.19

You can also access this box from the Item Status screen, under **Actions for Catalogers (Alt + F)**, **Actions for Selected Items (Alt + S)**, or by right clicking on the item line.

