User Buckets

User Buckets can be created to temporarily hold a group of patrons that need to be reviewed or updated. For example, you may wish to create a user bucket of potential duplicate patron accounts that you wish to review further, or a user bucket for a family that needs to have all of their addresses updated, or a user bucket for all new accounts that are created so that they can be double-checked for completeness later.

Adding Patrons to User Buckets

Patrons can be added to a User Bucket from the Patron Search Screen or the Circulation Menu.

**Patron Search Screen**

1. Perform a patron search.
2. Select the patron(s) to add to a bucket and click the Add To Bucket button.
3. Choose the bucket to add the patron to or create a new bucket.
4. A message will show at the bottom right of the screen that says, “X # of patrons have been added to bucket Y.”
5. To view the bucket open the Circulation menu and choose User Buckets.
6. In the Bucket View tab click the Buckets button and choose the bucket to view.

**Circulation Menu**

1. Open User Bucket from the Circulation menu.
2. In the Bucket View tab click the Buckets button and choose the bucket to add the patron(s) to or create a new bucket.
3. Leaving the bucket being used open in the Bucket View tab, click on the Pending Users tab.
4. Scan the patron barcode in the Barcode box. The patron will be added to the list below.
5. Highlight the patron and right click or use the Actions menu and select Add To Bucket.
6. Switch back to the Bucket View tab. You will see that the patron has been added to the open bucket.

**Actions**

**Batch Edit All Users**
Only staff with LibraryManager or LocalAdmin permissions can use the Batch Edit feature. Clicking on the Batch Edit All Users button allows you to update certain fields on all of the patrons in the current bucket at once. Give the update a name in the “Name for edit set” field and then you can update:

- Home Library
- Main Profile (Patron Permission Group)
- Internet Access Level
- Barred Flag
- Active Flag (PINES has scripts that run nightly to mark patrons active or inactive, so this will not typically be used by PINES staff)
- Juvenile Flag (PINES has scripts that run nightly to change juvenile accounts to adult accounts when they turn 18, so this will not typically be used by PINES staff)
- Privilege Expiration Date (Account expiration)

**View Batch Edits**

This allows you to see the list of batch edits that have already been done on the current bucket.

**Roll Back Batch Edit**

This allows you to select a previous batch edit that was done to the current bucket and undo it.
Batch Modify Statistical Categories

For those libraries that use patron stat cats, this will allow all patrons in the current bucket to be updated at once.

Individually Edit Selected Users

Select the patrons you wish to edit from the list and click on Actions > Individually Edit Selected Users. Each of the patron accounts you selected will open in a new tab.

Remove Selected Users From Bucket

Select the patrons you wish to remove from the current bucket and click Actions > Remove Selected Users From Bucket. The patrons you selected will be removed from the bucket.