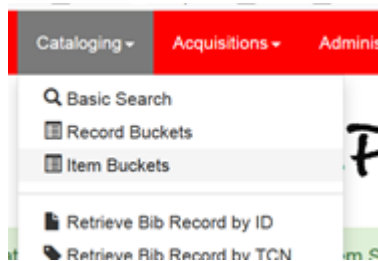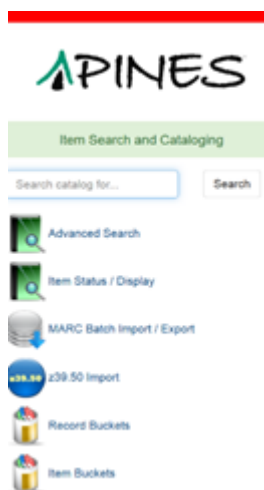# Item buckets

Item buckets are virtual containers that hold items for batch processing or other functions. With copy buckets, catalogers can transfer multiple copies to the same volume, edit item attributes in batch, delete items in batch, and print spine labels. Items remain in the bucket until they are removed.

The Item Bucket interface is accessed from the Cataloging menu - Item Buckets

Or from the PINES splash page:

## Permissions for Item Bucket management and use.

Permissions to manage and use buckets are not set by default for all staff logins. Your local system administrator may need to add permissions to staff in order for them to add items to a bucket, for example. The permissions for buckets are:

CONTAINER_BATCH_UPDATE
CREATE_CONTAINER
CREATE_CONTAINER_ITEM
DELETE_CONTAINER
DELETE_CONTAINER_ITEM
UPDATE_CONTAINER
VIEW_CONTAINER

Navigating Item Buckets

Customizing the list

You can customize the bucket list as you can other lists in Evergreen. Select the dropdown menu on the right:
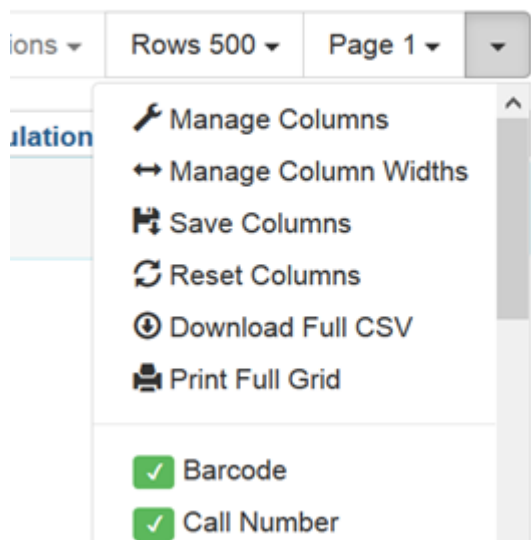

Select and position the columns as you need. Remember to Save Columns after you are done so that the custom configuration is available the next time you open the item bucket interface. You can add and remove columns as needed for your task. For more information, see Column Configuration

You can add or remove columns as needed for a specific task.

Select number of rows to display

You can display from five to all rows in a bucket. Be aware that displaying all rows for a bucket containing a large number of items can take significant time to load and navigate.
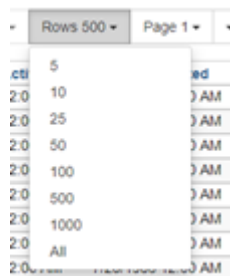
Navigating between pages

Forward and back buttons navigate between pages. The start button takes you back to the first page. Displaying 500 or more items to a page can significantly slow navigation from page to page.
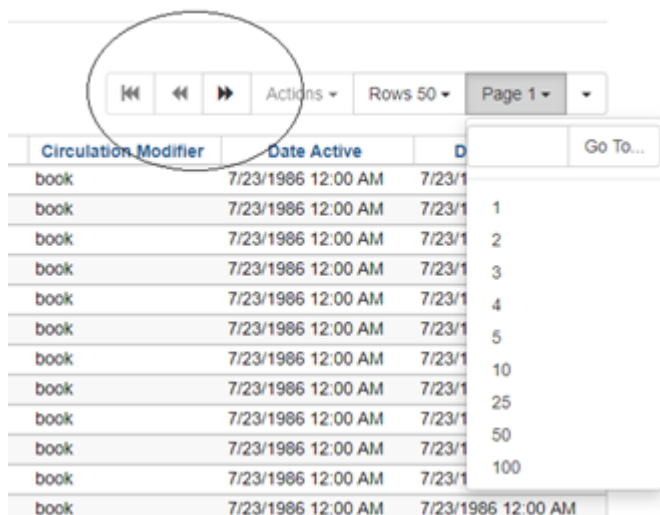
You can also go to a specific page by using the drop down menu at the page number and either using one of the preset numbers or typing in the desired page number.
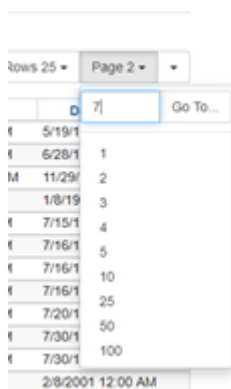
Sorting a list

You can sort the list by each column heading, A-Z and then Z-A. This sorts the entire bucket, even if you have more items in the bucket than are displayed per page.

Opening a bibliographic record

Click on the linked title to view the bibliographic record. Right click to access the menu to open in a new tab or page.

Displaying items in Item Status

Click on the linked barcode or right click to access the menu to open in a new tab or page. The item will open in the display view of Item Status.
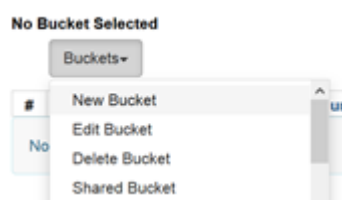
> You cannot open a list of items in Item Status from an item bucket.

Creating Item Buckets

Item buckets can be created in the interface or on the fly when adding copies to a bucket form Holdings view or Item status.

In the item bucket interface

Click on the drop down menu Buckets and choose New Bucket.
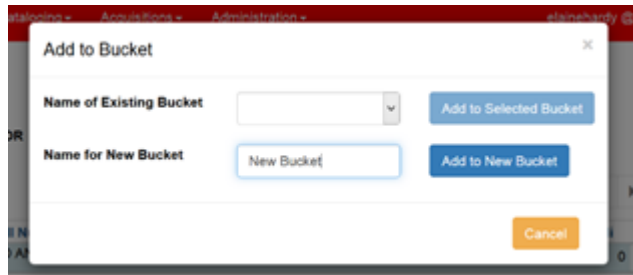

A dialog box will open.

Name your bucket and optionally add a description. You cannot reuse names; however, the bucket interface is case sensitive.

> Checking the Publicly Visible flag allows staff without VIEW_CONTAINER permissions to view the bucket. It does not make it visible to the public.

Creating a bucket in Holdings view and Item status.

In holdings view or item status, select the item(s) to be added to the new bucket and, from the Actions menu, choose Add Items to Bucket. From the dialog box, enter a name and then choose Add to New Bucket. Multiple or single items can be added from holdings view and item status from list view. Only one item can be added from Detail View.
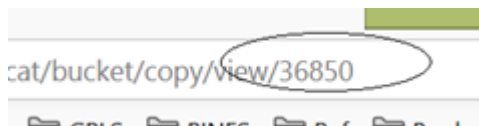

Editing Item Buckets

You can change the name, description, or publically visible flag in Edit Buckets. Open a bucket and from the dropdown menu choose Edit Buckets. A dialog box will open where you can edit the name, add or edit the description, or check/uncheck the visible flag.
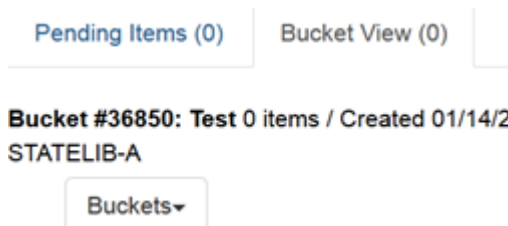
Make the desired edits and then click on Apply Changes.
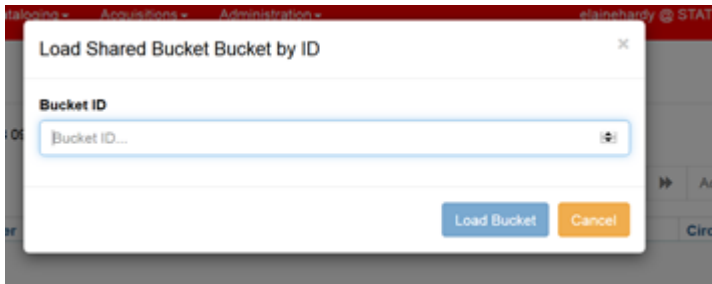
Sharing Item Buckets

Any bucket can be shared using the bucket ID number. You can find the number either in the URL while the bucket is open:

Or in the bucket header:

Using the number, staff with the appropriate permissions can open the bucket from Buckets – Shared bucket. After entering the ID number into the dialog box, click Load Bucket.

Deleting Item Buckets

With the bucket displayed, it can be deleted from Bucket – Delete Bucket. A click through dialog box opens to confirm or cancel the deletion.

Buckets do not have to be empty to be deleted.

Adding Items to a Bucket

Items can be added to an item bucket from pending items in the bucket interface, holdings view, or item status.

> ⚠️ Items added multiple times to a bucket will only display once but will be counted for each time added. For example, if a barcode is inadvertently added three times to a bucket with 10 items, 11 will display in the list but the count will be thirteen.

From the Item Bucket Interface

In the interface click on the Pending Copies tab.

Scan in all of the items you wish to add to the bucket.

Click on the Buckets dropdown menu and select the bucket for the items, or create a new bucket if needed.

Use the check boxes to select the item(s) you wish to add to the bucket. You can add all or a subset of the list.

Click Actions and select Add to Bucket. The selected items will be added to the bucket. The number of

items in the bucket, displayed beside the bucket name, will update as will the number on the Bucket View tab.

Once you have added your selected items to a bucket you can deselect them, select other items on your pending list, and add those items to a different bucket.

The pending list can be cleared from the actions menu. You must check a least one item. However **_ALL_** items on the list will be cleared. You can also clear the pending list by redisplaying or closing the bucket tab.

From Holdings View

Retrieve the title through a catalog search. If it is not your default view click on the Holdings View tab. Use the check boxes to select the item(s) you would like to add to the bucket. Click Actions – Add Items to Bucket

Enter a name for your bucket or select an existing from the drop down menu. Click Add To New Bucket or Add To Selected Bucket.

Repeat steps 1 through 7 to add additional copies from different bibliographic records, or if your copies on one record are more than one page.

From the Scan Item/Item status Interface

Enter items in item status by either scanning them in or loading a file. Select those you want to add to the bucket. Click on Actions – Add items to bucket.

You can add items to different buckets from the item interface by selecting those to go in one bucket, adding them, deselecting them and then selecting the next set to be added to the next bucket.

You can add items from multiple item status imports to the same bucket.

> Importing a file containing more than 1000 items can fail. Break large files into no more than 500 items to ensure a successful upload.

Selecting items in a bucket

You can select all the items on a page by clicking in the box at the beginning of the list

Buckets▾

#	✔	Owning Library	TCN	Call Nur
1	✔	STATELIB-L	ocm00013774	686 M
2	✔	STATELIB-L	ocm00048164	658.4032 C
3	✔	STATELIB-L	ocm00136968	683 B
4	✔	STATELIB-L	ocm00214174	659.29021 S
5	✔	STATELIB-L	ocm00243123	658.42 L
6	✔	STATELIB-L	ocm00297860	659.290274 F
7	✔	STATELIB-L	ocm00388785	658.8090705
8	✔	STATELIB-L	ocm00402935	658.9102 Q

Deselect the list by unchecking the box.

Select individual items by checking the box by each item

| #		Owning Library	TCN
1	☐	STATELIB-L	ocm00013774
2	✔	STATELIB-L	ocm00048164
3	☐	STATELIB-L	ocm00136968
4	☐	STATELIB-L	ocm00214174
5	✔	STATELIB-L	ocm00243123
6	☐	STATELIB-L	ocm00297860
7	✔	STATELIB-L	ocm00388785
8	☐	STATELIB-L	ocm00402935
9	✔	STATELIB-L	ocm00575184
10	☐	STATELIB-L	ocm00601117
11	☐	STATELIB-L	ocm00636316
12	☐	STATELIB-L	ocm00968588

Select a range of items by checking the first item in the range and, holding the shift key, click on the last item anywhere other than the check box.

96	☐	STATELIB-L	ocm71552220	658.4063 C5241	Chesbrough, Henry …	Open business m
97	☐	STATELIB-L	ocn425785243	658.812 D279 DVD		Dealing with the i
98	✔	STATELIB-L	ocn425785243	658.812 D279 STUD…		Dealing with the i
99	☐	STATELIB-L	ocn652447561	658.473 W92655 DVD		Workplace violen
100	✔	STATELIB-L	ocn652447561	658.473 W92655 ST…		Workplace violen
101	✔	STATELIB-L	ocn646069241	658.473 W92655 DVD		Workplace violen
102	✔	STATELIB-L	ocn646069241	658.473 W92655 ST…		Workplace violen
103	✔	STATELIB-L	ocm75632016	658.409 W1321	Wagner, Rodd.	12 : the elements
104	✔	STATELIB-L	ocm57142587	658.409 B923	Buckingham, Marcus	The one thing yo
105	✔	STATELIB-L	ocm48588434	658.4036 L563	Lencioni, Patrick 196…	The five dysfunct
106	✔	STATELIB-L	ocm53848357	658.456 L563	Lencioni, Patrick 196…	Death by meeting
107	☐	STATELIB-L	ocm70173615	658.4092 L4343		The leader of the

Use caution because clicking again anywhere will deselect the section. You can ignore the highlighting.

Removing Items from a Bucket

Select the item or items you wish to remove from the bucket. From the Action menu, click on Buckets – Remove selected Items from Bucket.
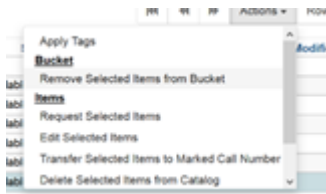
The item(s) will be removed without a dialog box to cancel the action.

Editing Items in a Bucket

In your bucket, select the item(s) to be edited. From the Actions menu, click on Items – Edit Selected items.

The Holdings editor will open. Make necessary changes to the item attributes. Click on Save & Exit. The items will be updated. See The Holdings Editor for more information on editing items in the holdings editor

Editing 500 or more items at one time can cause speed and response issues. The items might be edited but the Holdings Editor may not close to indicate success. Navigating though pages when 500 or more items are displayed can be slow and can cause action time outs.

Best practice is to display 100 items, and select the entire list, edit and then navigate to the next page.

Deleting Items from the Catalog

Select the item(s) to be deleted. From the Actions menu, click on Items—Delete selected items from Catalog. A confirmation pop-up box will open:
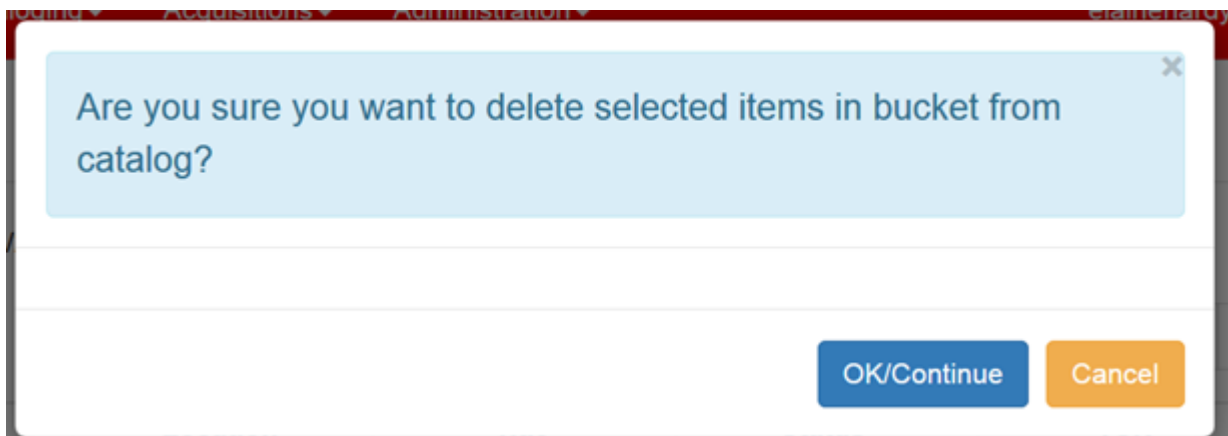
Click OK/Continue to delete the items or Cancel to stop the action.

Placing Holds on Items in a Bucket

You can place a copy level hold on items in a bucket. Select the ones you need and from the Actions menu, choose Items – Request selected items. A pop-up dialog will open with your card number and name. You can change the pickup library here. It also displays the number of items to be placed on hold.

> note   PINES has not implemented Recall Hold or Force Hold.

Copy level holds will be placed on the items.

Transferring Items to Volumes

If you have multiple items across multiple titles that need to be transferred to a single volume, you can use an item bucket, rather than having to transfer multiple times.

Identify the bibliographic record containing the correct volume. In holdings view, select the volume and, from the Actions menu, choose Mark – Library/Call number as Transfer Destination.
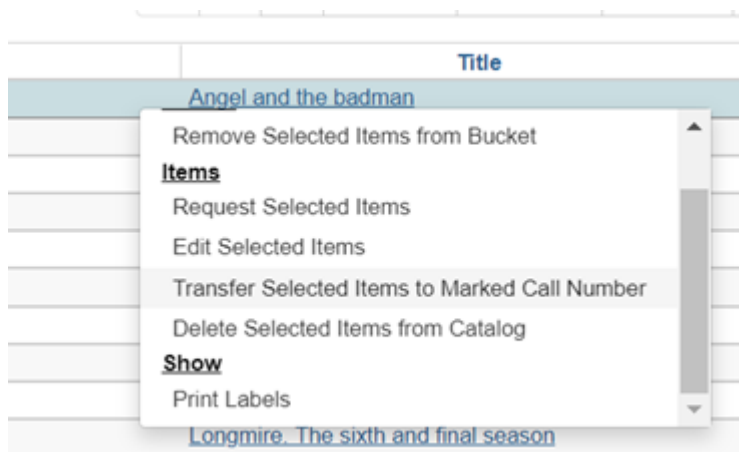
In the item bucket, select the items to be transferred to the marked volume and choose Items – Transfer Selected Items to Marked Call Number. The transfer will occur with no confirmation request.

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