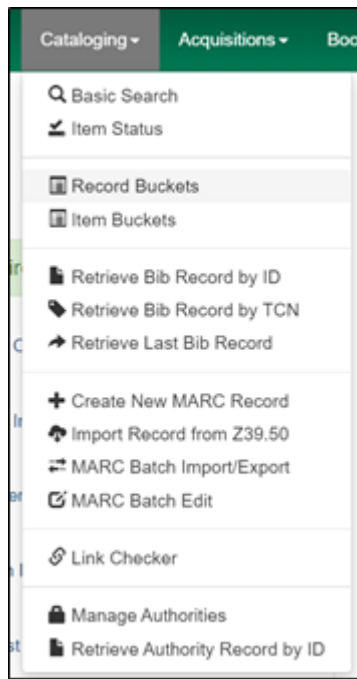


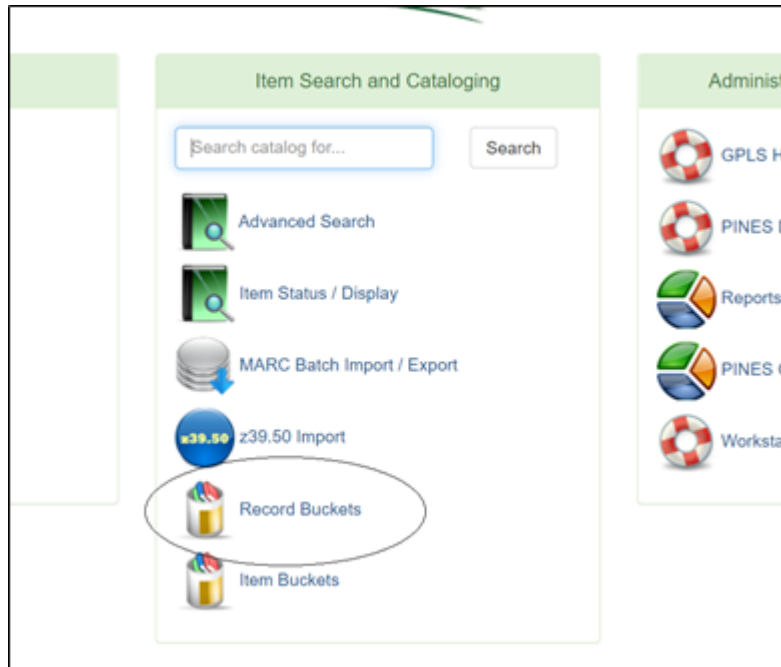
Record buckets

In the Evergreen staff client, record buckets are virtual containers that hold title records for batch processing. Record buckets allow for merging duplicate records and deleting several records at one time. Catalogers primarily use record buckets to merge duplicate bibliographic records. While they can be used to delete records, since Evergreen automatically deletes a bibliographic record when the last item and call number is removed from holdings, deleting records in batch from a record bucket is rarely necessary. Record buckets can also be used to transfer title holds and to export the bibliographic record. PINES catalogers rarely need to do either.

The record bucket interface is accessed from the Cataloging menu- Record Buckets:

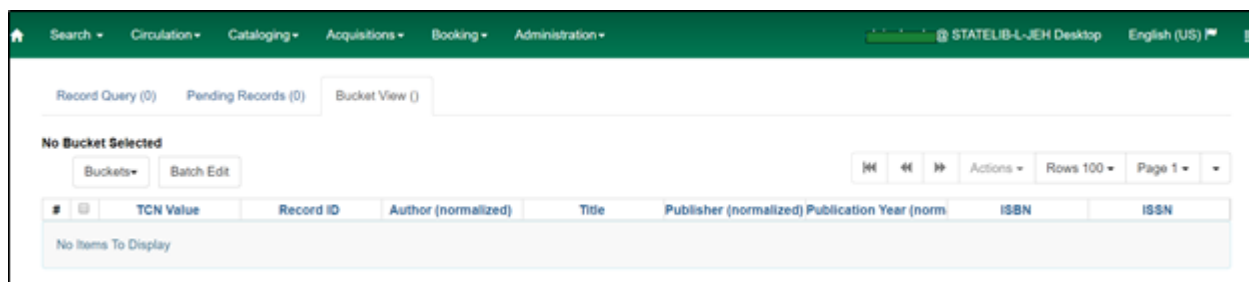


Or from the Home page:



Bucket view

The Record Bucket interface opens in Bucket View.

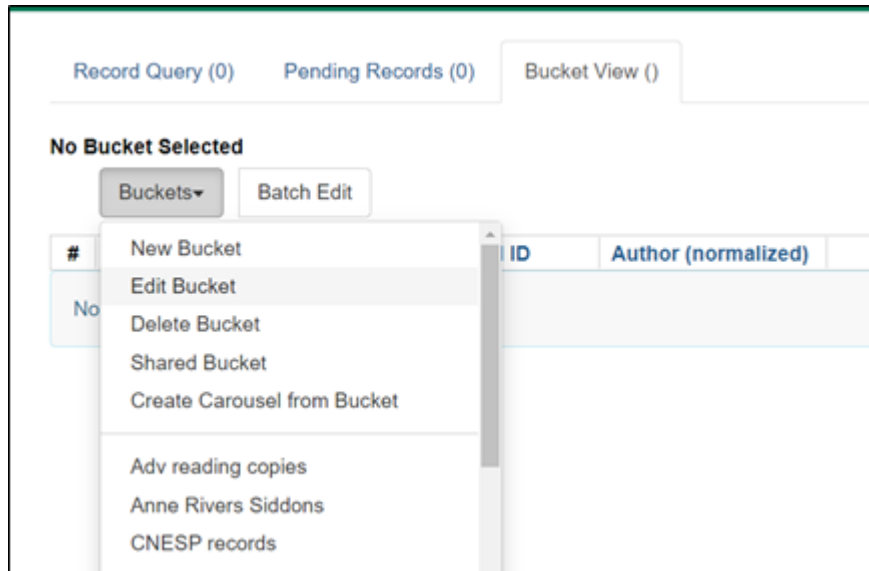


As with all other list interfaces in Evergreen, you can configure the arrangement and composition of the lists in Bucket View, Pending Records, and Record Query for your needs using the column picker. See [Function Bar/Columns](#)



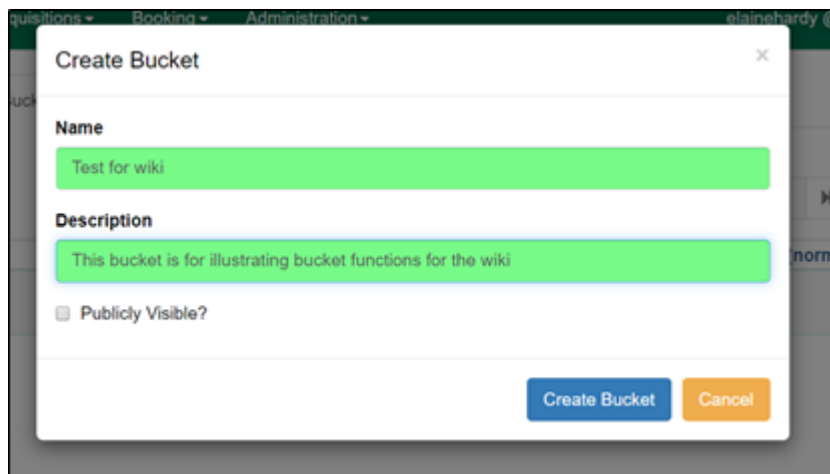
There is currently a bug that negatively impacts Record Query functionality if Record ID is deselected as a column. Leave Record ID in the bucket list to enable all query functionality.

In Bucket View, you can create, edit, or delete buckets. You can also access a shared bucket or your existing buckets:



New Buckets

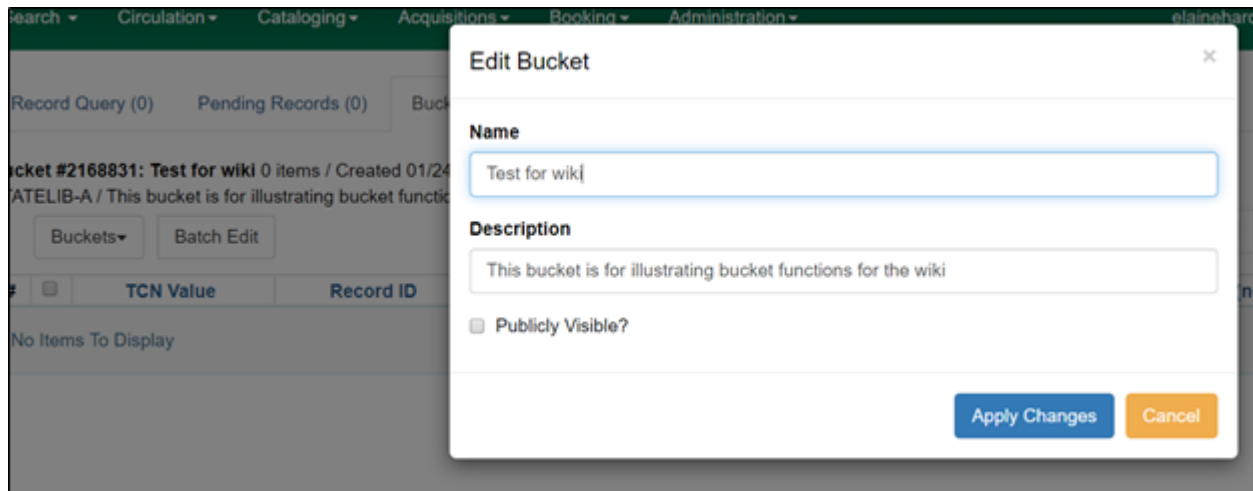
Choosing New Bucket opens a dialog box where you can name the bucket and add a description, if desired:



The Publicly Visible check box makes the bucket visible to staff that do not have permissions to view the bucket; it does not make it visible in the public OPAC.

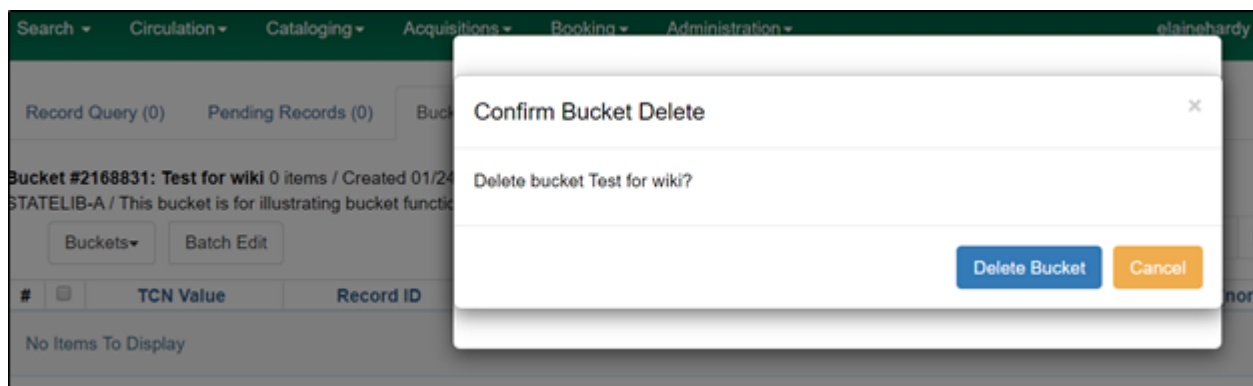
Edit Bucket

When a specific bucket is open, edit opens a dialog box to edit the name, add or edit a description, or click the publicly visible box.



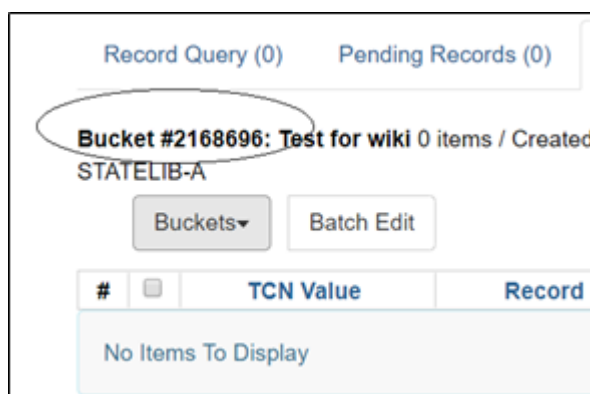
Delete Bucket

Delete bucket is used when a bucket is open. Delete allows you to delete a bucket, with or without contents. A dialog box opens to confirm or cancel the option to delete the bucket:

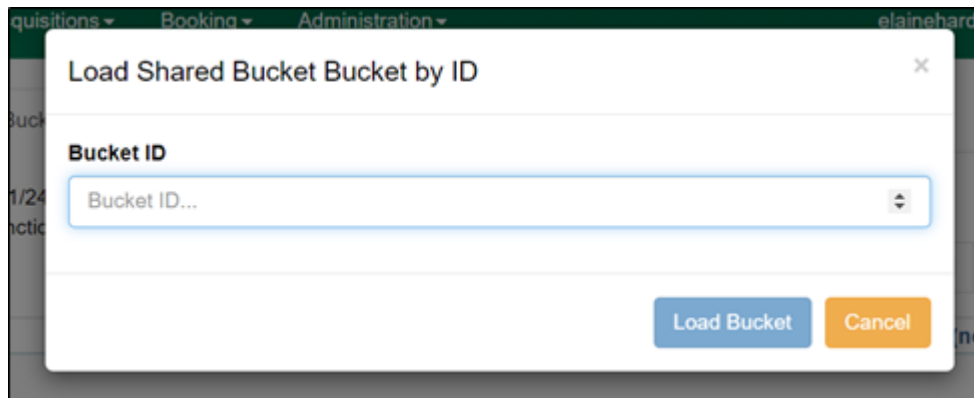


Sharing buckets

Shared Bucket is used to open a bucket that has been shared with you. To share a bucket with another user, give the bucket number for that bucket to that user:



Enter the number for the shared bucket in the dialog box that opens when Shared Bucket is selected:

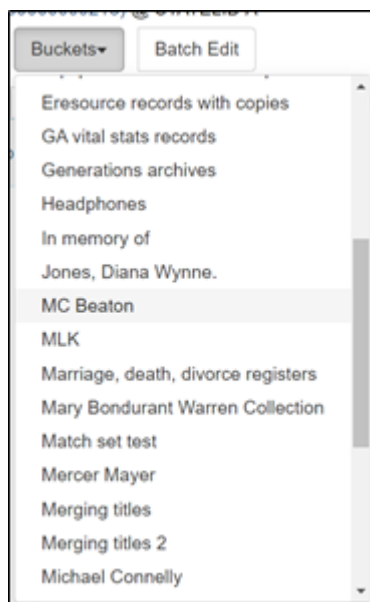


Create Carousel from Bucket

Not implemented by PINES. If your library wants a specialized book carousel, create a record bucket with the desired titles. Open a [helpdesk ticket](#) and share the bucket number so that PINES staff can create the carousel.

Opening an existing bucket

Choose an existing bucket by scrolling to it in the list of bucket names:



The bucket number, counter, title, and owner are immediately above the bucket. The counter keeps track of the number of titles in the current bucket. It automatically updates as you add or remove records from the bucket.

Record Query (0) Pending Records (0) Bucket View (22)

Bucket #2145756: MC Beaton 22 items / Created 01/17/2020 09:34 / Hardy
STATELIB-A

Buckets Batch Edit

Actions Rows 100 Page 1

#	TCN Value	Record ID	Author (normalized)	Title	Publisher (normalized)	Publication Year (norm	ISBN	ISSN
1	AUTOGENERATED_...	6076019	Beaton, M. C.	Death of a chimney s...		2010	(9781602839311,160...	
2	LOPL_101916	5991795		Hamish Macbeth. Se...		2005	(1419812904)	
3	LOPL_102959	5992838	Beaton, M. C.	Love, lies and liquor...		2006	(1415933723)	
4	LOPL_132811	6022690	Beaton, M. C.	Death of a dustman		2003	(9780792727811,079...	

Records entered more than once will be counted but will only display once in the list. However, you will have to remove the record as many times as it was added.



Record Query (5) Pending Records (0) Bucket View (4)

Bucket #2168831: Test for wiki 4 items / Created 01/24/2020 16:48 / Hardy (21099000000213) @
STATELIB-A / This bucket is for illustrating bucket functions for the wiki

Buckets Batch Edit

#	TCN Value	Record ID	Author (normalized)	Title	Publ
1	ocm11685942	119300	Delany, Samuel R.	Stars in my pocket lik...	Toro
2	ocm55657547	5038105	Delany, Samuel R.	Stars in my pocket lik...	Mide

Bucket record lists can be sorted (A-Z, 0-9) by any of the headings by clicking on the column heading. A second click orders them in the opposite direction (Z-A, 9-0). Sorting is across the entire bucket and not just a displayed page.

Clicking on the title of the individual record opens the record in the same tab. You can open in a new tab by right clicking on the linked title and using the browser functions or selecting it with the check box and using the option to open the record from the Actions menu.

Actions Menu

From the Actions menu, you can:

Show Selected Records in Catalog

- Use this to open records in new tabs

Remove selected Records from Bucket

- Records remain in a bucket until they are removed
- You can delete a bucket that still contains records

Move Selected Records to Pending Records

- Use this function to move records from one bucket to another
- The record will automatically be removed from the current bucket

Delete Selected Records from Catalog

- Since bibliographic records automatically delete when the last holding is deleted or transferred, this bucket function is rarely used
- A bibliographic record with holdings will not delete using this function

Transfer Title Holds

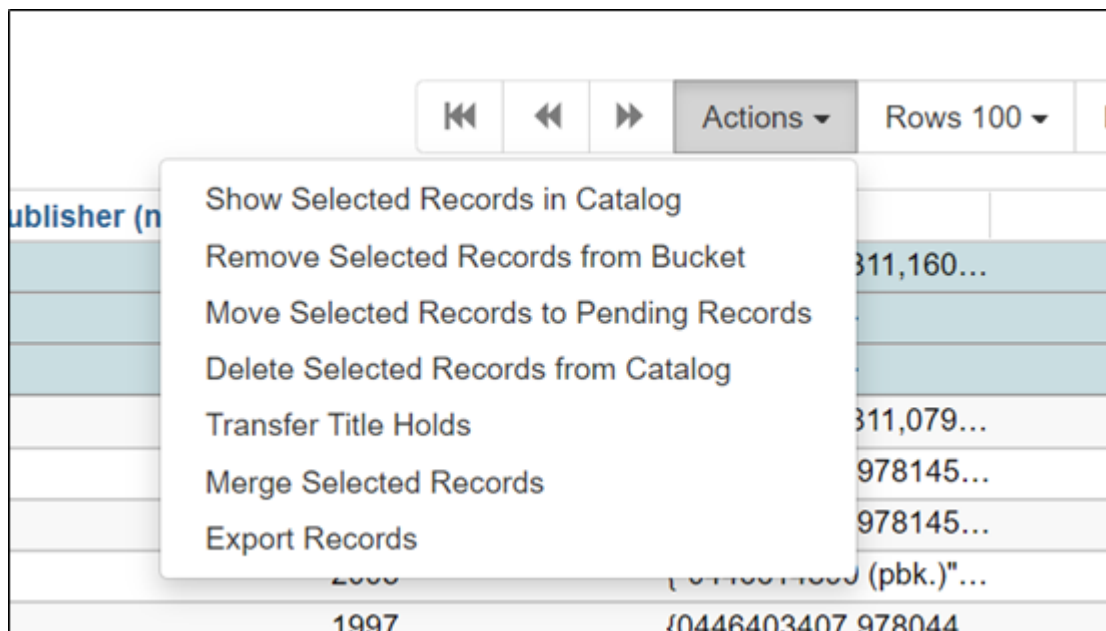
- Used when a large number of title holds are placed on wrong records
- Not used by PINES libraries. Title holds should be transferred individually to prevent errors.

Merge Selected Records

- Used to merge duplicate records

Export Records

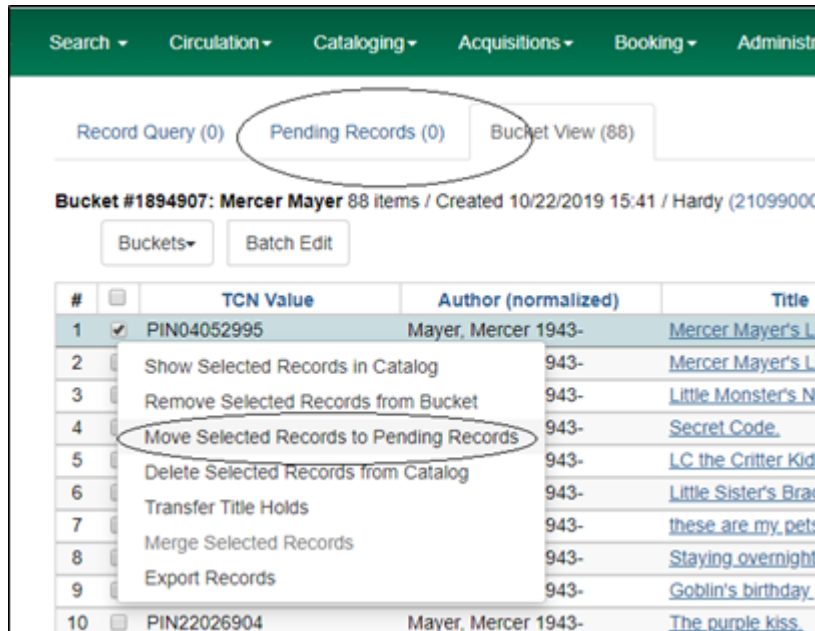
- This can be used to export records for uploading into other editing programs such as MARC Edit or to upload records into OCLC. This function is rarely used by PINES catalogers.



The Actions menu can also be accessed by right clicking within the record list after you select records.

Pending Records

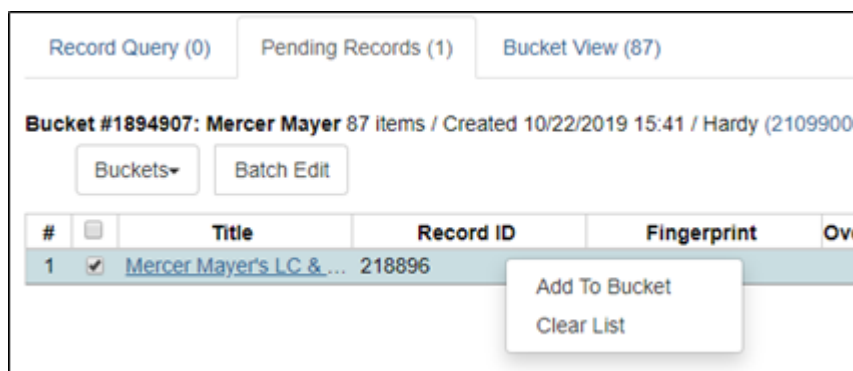
You move titles between buckets by first placing them in the Pending Records section:



The record is *immediately removed* from the bucket and placed in Pending Records. You can select multiple records to move. You can also move them back to the same bucket from Pending.

Next, choose the target bucket for the record while still in bucket view.

Go to the Pending Records tab and select the titles to move to the bucket.



You can place records in Pending Records and move them to multiple buckets. Just return to Bucket View to select the next target bucket.

Records remain in Pending until the list is cleared or the bucket interface is closed.

Adding titles to record buckets

Records are added to buckets from Record Query within the Records Bucket interface, the Other Actions menu in any record view, and from record baskets.

Record Query

You can also use the Record Query functionality within the record bucket interface to create a list of records to add to a bucket. Record Query allows you to add more than one bibliographic record at a time to a bucket. You can also add to multiple buckets from Record Query using the pending record function.

Open Record buckets and click on the Record Query tab:

The screenshot shows the Record Query interface. At the top, there are three tabs: "Record Query (0)", "Pending Records (0)", and "Bucket View ()". The "Record Query (0)" tab is selected. Below the tabs, it says "No Bucket Selected". There is a search bar labeled "Record Query" with the placeholder text "Query...". Below the search bar are two buttons: "Buckets▼" and "Batch Edit". Below these buttons is a table with the following columns: "#", "Title", "Record ID", "TCN Value", "Author (normalized)", "Publisher (normalized)", and "Publ...". The table is currently empty, and a message "No Items To Display" is shown at the bottom.

You can choose a bucket for your titles directly from Record Query or from the Bucket View tab:

This screenshot is similar to the previous one, but with two annotations. A circle highlights the "Bucket View ()" tab at the top. Another circle highlights the "Buckets▼" button below the search bar. The rest of the interface, including the "Record Query (0)" tab, the search bar, the "Batch Edit" button, and the empty table with "No Items To Display", is the same as in the previous screenshot.

You can do a keyword search without a search key. Other indexes require a search key followed by a colon (:):

You can do a keyword search without a search key. Other indexes require a search key:

Search key	Definition
keyword/kw:	search keyword(s)
author/au/name:	search author(s)
title/ti:	search title
subject/su:	search subject

series/se:	search series
site:	search at specified org unit, using the library short name (STATELIB or STATELIB-L)

(keyword, title, author, subject, and series support additional search subclasses, specified with a |. For example: title|proper: gone with the wind)

You can also combine search keys. For example: au: Weber ti: by schism rent asunder. You can use Boolean operators such as * as well as **&&** for **AND**, **||** for **OR**.

Examples:

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



There should be no space between the closing parentheses in the above example; however, wiki formatting rules necessitate the space to prevent automatic formatting.

Use the enter key to execute your search.

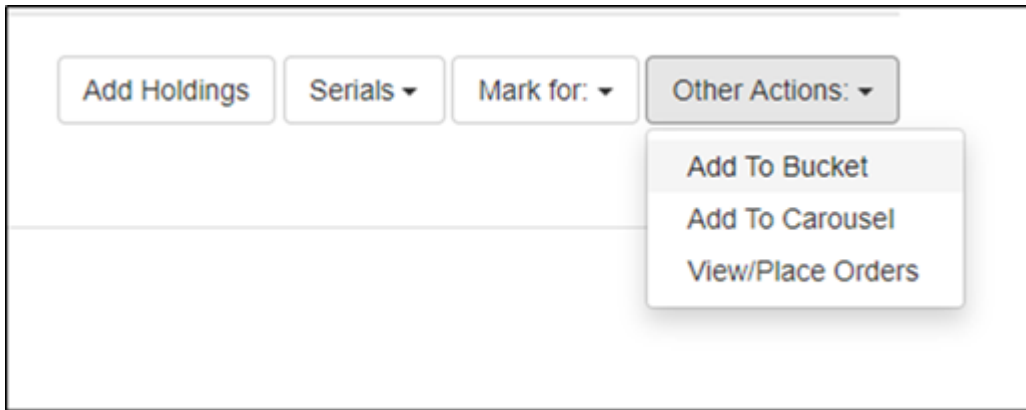
Move records from the query tab either to Pending Records or directly to the bucket displayed in Bucket View from the Action menu.

Record Query (9) Pending Records (0) Bucket View (0)			
Bucket #2168831: Test for wiki 0 items / Created 01/24/2020 16:48 / Hardy (21099000000213) @ STATELIB-A bucket functions for the wiki			
Record Query subject:christmas (netherlands dutch holland)			
Buckets▼ Batch Edit			
#	Title	Record ID	TCN Value
1	<input checked="" type="checkbox"/> The Christmas cookie tree	101046	ocm01602151
2	<input checked="" type="checkbox"/> Christmas in the Netherlands	254566	ocm01602151
3	<input type="checkbox"/> Tippy Bear's Christmas	400183	ocm01602151
4	<input type="checkbox"/> Pennsylvania Dutch Night befor...	1385149	ocm01602151
5	<input type="checkbox"/> The family of John Massie, 174...	2110643	ocm05992916
6	<input type="checkbox"/> Hans Brinker	2465024	ocm53464727
7	<input type="checkbox"/> The child in the manger	5473683	ocn665868656
8	<input type="checkbox"/> Christmas in Holland	5534410	ocn730114593
9	<input type="checkbox"/> Pennsylvania Dutch Night befor...	5965420	LOPL_75541

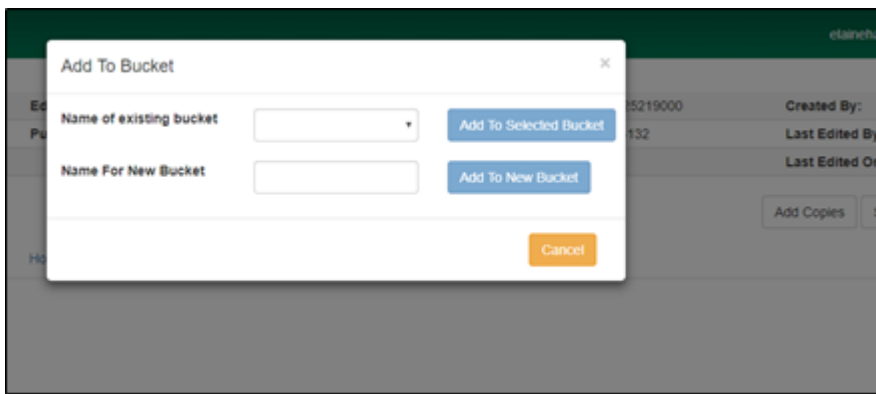
The record query list clears with a new search or when the record bucket interface is closed.

Other actions menu

With the record displayed in any view, choose Add to Bucket from the Other Actions menu:



From the dialog box, choose an existing bucket or Add to New Bucket. If you add to new, you will need to name the new bucket.



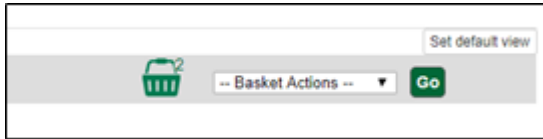
Baskets

You can add records to a bucket from search results or from an individual record's OPAC view using a basket. Baskets are temporary holders for a specific action and will empty on logout.

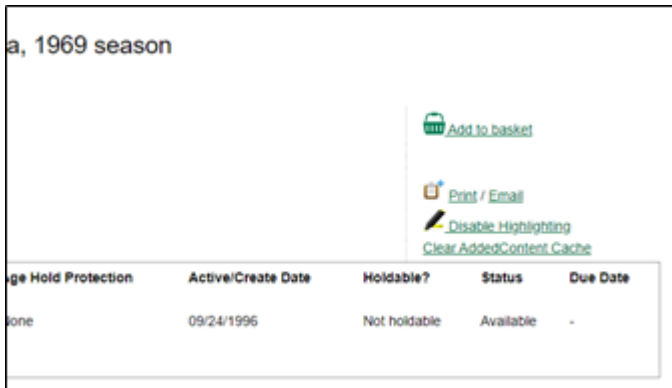
From the search results, select the records to be added to the basket:



The basket counter tracks the number of records added as soon as you click the check boxes:

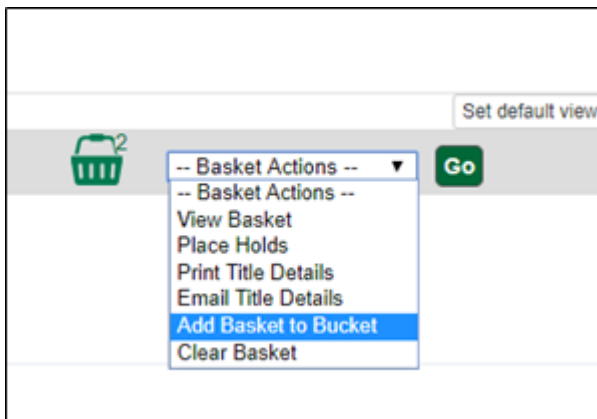


You can also add to the basket from the OPAC display of a record:



You can add records to a basket from different search results.

Once you have all desired records in a basket, you can transfer them to a bucket.



Click on Go. A dialog box will open for you to choose a bucket. You may need to clear the basket to reuse it prior to signing off.

Merging records

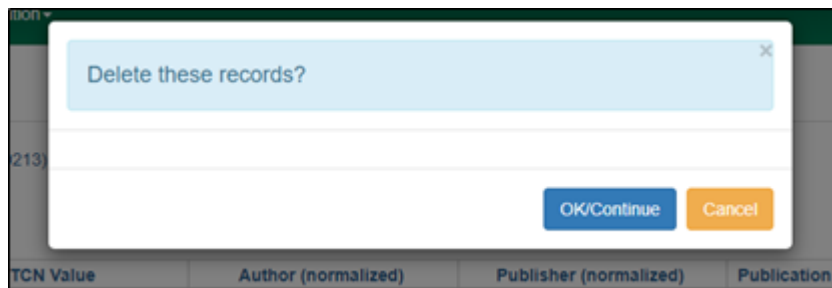
See section on [Merging Title Records in Evergreen](#)

Deleting titles

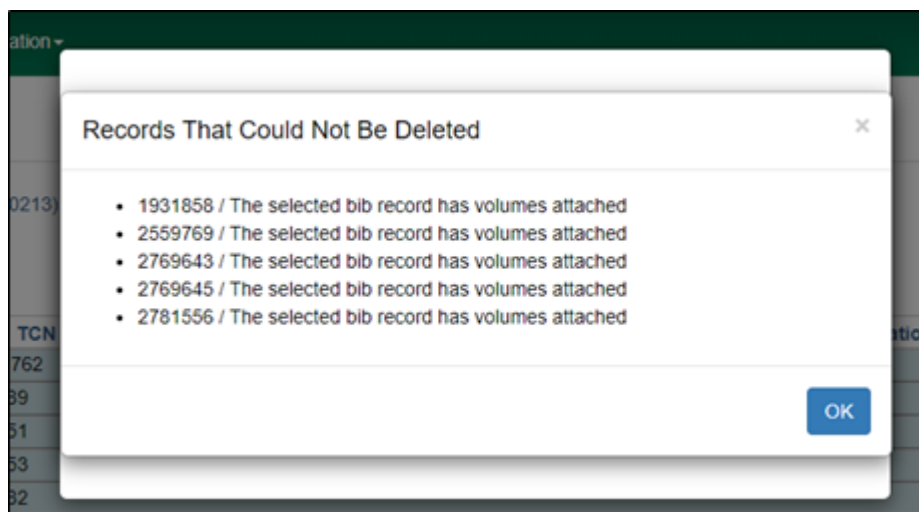
You can batch delete bibliographic records from the record bucket interface. In general, this functionality

will be rarely used in the PINES database since bibliographic records delete automatically when the last holding is deleted. There may be times, however, when you do need to batch delete title records that have no holdings, such as those for electronic resources.

After you have entered the records to be deleted, select them and then choose Delete Selected Records from Catalog from the Actions menu. A dialog box will open confirming the deletion:



Clicking OK/continue deletes the records unless holdings are still attached. If holdings are present, an dialog box displays listing the records by Record/Database ID that could not be deleted:



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