Chapter 17 -- Copy Buckets

Buckets are virtual “containers” to use in batch processing item or bibliographic 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, and each type has its own Bucket Manager. 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.

You can use Copy Buckets to make batch changes in the Copy Editor in much the same way that batch changes can be done from the Item Status screen. See page 15.4, Using the Item Status Screen to Make Changes to Multiple Items, if needed. For straight-forward one time changes, it is often quicker and simpler to use the Item Status screen than Item Buckets.

Copy Buckets are very useful for groups of items which you will be dealing with over a period of time. If you are making temporary changes to a group of items, copy buckets allow you to make group changes, and store the items in the bucket so that more group changes can be made at a later date.

Some examples of ways you might use a copy bucket:

- To temporarily change the status or shelving location of a group of items for a period of time. For instance, if you are placing items in storage, temporarily transferring them to another branch, or using them in a special display. You can add the items to a bucket, and change the location. By keeping copies in the bucket, you can transfer them to a different location when the allotted time is up without handling the actual items.
- To track leased items. If your library leases bestsellers or audiobooks for a certain period of time, you can add these items to a bucket when you add them to the catalog. Then when you are sending the group of leased items back, you can delete all the items in that bucket at once.
- To collect items for a particular project over a period of time. You can create a bucket and add items for a future project over days, weeks or months before making changes, sharing them with another user, or printing a bibliography.
Creating New Copy Buckets from the Bucket Manager

One way to create new buckets is from a Bucket Manager screen.

You can open the Copy Bucket Manager from the Cataloging Menu (Alt + G) by selecting Manage Copy Buckets (Alt + B), from the Edit Menu (Alt + E) by selecting Copy Buckets (Alt + B), or by clicking the Copy Buckets link on the Splash Screen.

**TIP:** To open Copy Buckets from the cataloging menu you will need to press B twice because another command on the menu is also Alt + B.
When the Copy Bucket Managers opens click the **New Bucket** button to create a new bucket.

A dialog box will pop up:

![Dialog box](image)

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 page at http://evergreen.lib.in.us says:  

You already have a bucket with that name.
```

**TIP:** 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, the bucket will be created. The bucket name will appear in the drop-down list, and the bucket name and number will be displayed below the drop-down list.
**Viewing Copy Buckets**

To view a bucket you’ve already created, open the Copy Bucket Manager as directed on page 17.2.

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

![Copy Bucket Manager screenshot]

Then select your bucket name from the list:
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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 in the bucket, it may take several seconds for the bucket to display.
Adding Items to Copy Buckets from Holdings Maintenance or Item Status

You can add items to buckets from the Holdings Maintenance screen or the Item Status screen. Search the catalog for the record you wish to add, and in the Holdings Maintenance screen, highlight the Barcode line of the item you wish to add to the bucket. See Chapter 3—Holdings Maintenance if needed.

Click on Actions for Selected Rows (Alt + R) and select Add Items to Buckets (Alt + B). You can also right-click and select Add Items to Buckets (Alt + B) from the drop-down list.

From the Item Status Screen, click Actions for Catalogers (Alt + F), Actions for Selected Items (Alt + S), or right-click on the item line, and select Add Items to Buckets (Alt + B) from the drop-down list. See Chapter 15—The Item Status Screen if needed.
A small window will open up at the top left hand corner of the screen:

![Add to Bucket Window]

Click **Add to Selected Bucket (Alt + B)**. The Item Buckets window will close. Nothing else will appear to happen, but your item will be added to your Item Bucket.

**TIP:** If you have the bucket open in one tab while you are adding items to you bucket in another tab, you may need to use the Refresh button to see the newly added items.

**Creating New Copy Buckets when Adding Items to Buckets**

You can also create new buckets from the **Add to Bucket** window. Access the window as described on page 17.7.
If you have not created any copy buckets, the box where the bucket names appear will be empty, as shown above, 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 dialog box will open on top of the Add to Bucket window. Enter a unique, descriptive name for your bucket here.

**TIP:** *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 item you selected will be added to the new bucket.
Adding Items to Copy Buckets from the Bucket Manager

From the Bucket Manager, scan, paste, or type a barcode number into the barcode box. Press Enter or click the Submit (Alt + T) button if you aren’t using a scanner. The items will appear in the pending area:
Open the bucket to which you’d like to add the items. Then highlight the items in the Pending Area you wish to add, and choose **Add Selected** with the down arrow to add only some items to the bucket. Or click **Add All** to add all of the items in the pending area to your bucket.
You have now copied the items to your bucket. They will remain in the pending area until you close the Copy Manager.
**Copying Copy Buckets**

You can copy the contents of one bucket to another bucket.

*TIP: 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. See *Viewing Copy Buckets*, page 17.5, if needed. 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 the **Add Selected** button with the up arrow, on the far right side of the screen.
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.
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. See **Viewing Copy Buckets** on page 17.5, if needed.

Once you’ve opened the bucket to which you’d like to transfer the items, you can highlight the items you wish to add, and choose **Add Selected** with the down arrow to add only some items to the bucket. Or click **Add All** to add all of the items in the pending area to your bucket.
The items will appear in your bucket at the bottom of the screen. If there are many items, this may take several seconds.

You have now copied the items to your bucket. These items have not been removed from the original bucket, and they will remain in the pending area until you close the Copy Bucket Manager.

**TIP:** 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.
Using Copy Bucket Manager Batch Function Tools

There are several tools available in the Bucket Manager for managing items. These are accessed by the buttons along the bottom of the Copy Bucket Manager:

NOTE: When you use these tools, your actions will apply to ALL the items in your bucket, not selected items.

The first tool is the Show Status Button:
When you click the Show Status button, the Item Status Screen will open in a new tab. All of the items in your active bucket will be displayed on the Item Status Screen:

![Item Status Screen](image)

**NOTE:** If the items in your bucket have been deleted, they will no longer display in the Item Status Screen.
The second tool is the **Transfer to Specific Volume** button. This allows you to transfer the items in your bucket to a different call number at your local branch or another branch.

You must first mark the call number you wish to transfer the items to as an Item Transfer Destination. See *Transferring Items from One Volume to Another* on page 10.7, if needed.

If you have not marked any volumes, you will get the following message:

```
The page at http://evergreen.lib.in.us says:

Please mark a volume as the destination from within the copy browser and then try this again.

OK
```

In this case, 4 new copies of *The Lost Symbol* by Dan Brown have been added with the call number FIC BROWN, but the other copies at this library have the call number FIC BROWN, DAN, so that volume has been marked as the Item Transfer Destination.
Click the **Transfer to Specific Volume** button. The following window opens allowing you to verify that the correct volume has been marked:

![Image of Item Transfer window]

**Record Summary**
- **Title**: The lost symbol : a novel
- **Author**: Brown, Dan
- **Edition**: 1st ed.
- **TCN**: (OCuLC) 00299845314
- **Created By**: (JCPLS) 275001000000064
- **Last Edited By**: (FCPLR) fcpl-cat1
- **Publication Date**: 2009
- **Last Edited On**: 10/12/09

**NOTE:** If you have marked a volume previously in your Evergreen session, it will remain marked until you mark a new one or log out. Check the information carefully so that you do not transfer your copies to the wrong volume. The record summary is displayed, as well as the volume marked and the branch. If any of these is incorrect, click the **Cancel (Alt + C)** button. You can then mark the correct volume and try again.

If your information is correct, click the **Transfer** button.

A dialog box will open:

![Image of dialog box: Items transferred]

Click **OK** or press **Enter**.
Your bucket will refresh, and the new call number will display:

The third tool is the Edit Item Attributes button. This allows you to make batch edits to copies in your bucket using the copy editor. If needed, see Chapter 7—Using the Copy Editor.
When you click the Edit Item Attributes button, the copy editor opens:

![Copy Editor screenshot]

You can make any changes desired, and they will be applied to all the copies. In this case, the loan duration is being changed from normal to long.

![Modified Copy Attributes]

When you have made your changes, click **Modify Copies** *(Alt + M)*.
The following dialog box will open:

![Dialog box with warning message: Items were added or modified. Click OK or press Enter.](image)

Click **OK** or press **Enter**.

Your bucket will refresh, and if the column picker is displaying the attributes that you edited, your changes will be displayed:

![Bucket view with changes highlighted](image)

The fourth tool is the **Delete All from Catalog** button. It will delete all the items in your bucket.

![Bucket view with Delete All from Catalog button highlighted](image)
When you click the button, the screen will refresh, and if you have the Deleted? Column displayed, it will change from No to Yes:

**NOTE:** The call numbers will NOT be deleted, only the items.

**TIP:** To avoid leaving orphaned call numbers, delete your items from the Item Status Screen. From Item Status, you can also delete the volumes.

**NOTE:** The Bucket Manager also includes **List Actions** buttons and **Column Pickers** in the Pending Copies and Bucket View area. Clicking on a **List Actions** button will display a drop-down list. The actions in the list allow you to copy and work with the data in the bucket or pending area in several ways. See page 12.6 of **Z39.50 Search Screen Features** for more information about the List Actions button. For further information on the Column Picker, see **Chapter 4--Using the Column Picker**.

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Version 1.6.0
Sharing Copy Buckets

**NOTE:** As of last update of the manual, Sharing Copy Buckets is not working in version 1.6.0. This is a known problem.

To view a copy 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.
To view a Copy bucket, open the Copy Bucket Manager. From 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:

```
The page at http://evergreen.lib.in.us says: ✗

? Enter bucket number:

6

OK Cancel
```

Type the Bucket Number of the bucket you wish to view in the box, and click **OK** or press **Enter**.
The Bucket Name and Number will be displayed, and the contents will appear in the window:

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.
Removing Contents from Copy Buckets

To remove contents from a bucket, use the Bucket Manager to view the copy bucket. Highlight the items you would like to remove. You can select specific items by pressing the Ctrl key as you click the line to highlight it, or press the Ctrl as you click a highlighted line to remove the highlight. You can also press the Shift key as you click from one line to another to highlight a group all at once.

To empty the bucket, select all contents of the bucket:

When you have highlighted everything you wish to remove from the bucket, click the Remove Selected From Bucket button.

**NOTE:** Do NOT click Delete All from Catalog at the bottom right side of the screen. This will delete the items from the catalog rather than removing them from your bucket.
The screen will refresh, and the items will no longer display in your bucket. If you are removing a lot of items this may take several seconds:
Deleting Copy Buckets

Deleting a bucket means getting rid of your virtual container. It is not the same as deleting the contents of your bucket. If you delete a bucket with contents, the items will remain in the catalog.

However, if you wish to delete a bucket that still has contents, it is a good idea to empty the bucket first. See Removing Contents from Copy Buckets on page 17.25 if needed.

Once your bucket is empty, click the Delete Bucket button:

A dialog box will open asking if you are sure you wish to delete the bucket:

Click **OK**, or Press **Enter**.

Nothing else will appear to happen, but your bucket will be deleted.
Your bucket will still be displayed as the active bucket, but note that it is no longer displayed as the selected bucket in the Bucket Drop down list. The bucket is no longer on the list, and once you close the Bucket Manager, you will no longer be able to access the bucket. If you still had contents in the bucket, they will no longer be displayed. Your bucket has now been deleted.