

CREATING AND USING RECORD SETS

AGENDA

Ways to create record sets

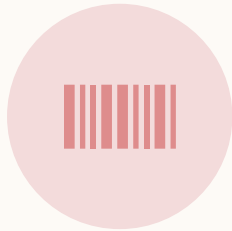
Patron record sets and their uses

Item record sets and their uses

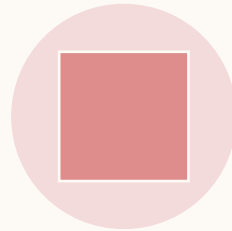
Bibliographic record sets and their uses

Final tips & takeaways

WAYS TO CREATE RECORD SETS



**FROM THE NEW MENU,
SELECT RECORD SET,
CHOOSE THE TYPE OF
SET, AND SCAN IN
BARCODES**



**FROM THE NEW MENU,
SELECT RECORD SET,
CHOOSE THE TYPE OF
SET, AND UPLOAD A FILE
OF BARCODES**



**CREATE A SET FROM FIND
TOOL SEARCH RESULTS**



**CREATE A SET FROM FIND
TOOL SEARCH RESULTS
AND SELECT INDIVIDUAL
RECORDS TO ADD TO A
SET**

CREATE SET BY SCANNING IN BARCODES

Patron Record Set ⓘ

Name

Note

☐ **BARCODE** **NAME** **STREET**

CREATE SET BY IMPORTING A FILE OF BARCODES

Item Record Set ⓘ

SAVE

ACTIONS ▾

REFRESH

CLOSE

Name

ODN Theodore Roosevelt Items

Owner

ODINMASON ▾

Record Set ID

35965

Note

Record Status

Final

Record Count

0

Scan or enter barcode

↵

FIND TOOL

<input type="checkbox"/>	TITLE	ASSIGNED BRANCH	COLLECTION	MATERIAL TYPE	SHELF LOCATION	CALL NO.	VOL.	STATUS	BARCODE	CONTROL NUMBER
										00(s) retrieved

ACTIONS ▾

Filter Records

Ad Hoc Bulk Change

Add from File

Add to New Record Set

Add to Existing Record Set

Check in

Remove Selected Records

Delete Selected Records

Item record sets can be created by uploading a file of barcodes.

Patron record sets can be created by uploading a file of patron IDs.

CREATE A SET FROM SEARCH RESULTS

Click the shopping bag icon to set up the record set options.
Then click the magnifying glass to execute the search.
All search results will be added to the record set.

Find Tool - Item Record

Item Record ▶ Power Search ▶ NGF > Books > Subject ▶

{SU ALL "gardening middle west") AND ((AB = 82) AND (TOM = "bks"))

Find Tool - Item Record

Record Set Options

☒ Send Results to a New Record Set

Name

ODN Workday Gardening books

Owner

North Border - Walhalla School Library (br) ▼

Warning Size Threshold

1000

CREATE A RECORD SET WITH THE FIND TOOL BY SELECTING SPECIFIC SEARCH RESULTS

7

Find Tool - Bibliographic Record

Bibliographic Record ▶ Basic Search ▶ All keyword fields ▶ Keyword (All) ▶

fiona its bedtime

* Title	Author	Format	Lin...	Hol...	Publi...	Call Number	Control...
<input checked="" type="checkbox"/> Fiona, it's bedtime	Cowdrey, Richard...	Book	1	0	2020	[E]	1260923
Stories to go: Time for bed.		Kit	1	0			1184208
Fiona the Hippo	Zondervan	Eaudio...	4	0	2023		1260780
The Magnificent Lives of Marjorie Post	Pataki, Allison	Ebook	1	0	2022		1173671
The Magnificent Lives of Marjorie Post	Pataki, Allison	Eaudio...	1	0	2022		1173677

Ready 5 result(s)

☐ Count Only

ADD TO RECORD SET ▼ OPEN CANCEL

ADD TO RECORD SET ▼ OPEN CANCEL

New Existing

Select the results you want to add to a new or existing record set.
Click the "Add to Record Set" button and select New or Existing.

PATRON RECORD SETS

If you want to know what items were checked out to a set of patrons, you can create an item record set of those checked out items.

Use Simply Reports if you want to know additional information about a set of patrons, such as last activity date.

ITEM RECORD SETS

- Create a missing item record set from the Find Tool and export it to Excel to create a list for checking shelves.
- Scan items that you suspect are no longer circulating into an item record set and evaluate the items using Simply Reports.
- Note: to export a record set to an Excel spreadsheet, the owner of the record set must be a branch or library. This is true for all types of record sets.



BIBLIOGRAPHIC RECORD SETS

- Bibliographic record sets are useful for reader's advisory
- Bibliographic record sets are useful for shareable links
- Bibliographic record sets are necessary for enhancing the PAC.
- TIP: You can scan item barcodes into a bibliographic record set and it will load the bibliographic record associated with that item barcode.

BIBLIOGRAPHIC RECORD SETS IN POWER SEARCH

- You can create a curated list of books for use at the public service desk.
- Create a saved power search for quick retrieval of the set.

Find Tool - Record Set

Record Set ▶	Power Search ▶	(unsaved) ▼
		(unsaved)
RSNA == "X"	Midwest Gardening Books	 

Name	Record Type	Owner	Total Record
------	-------------	-------	--------------

SHAREABLE LINKS

You can create shareable links for record sets. Some potential uses for shareable links include: popular storytime titles, booklists shared through newsletters or webpages, and reading lists that tie-in with library programs.

TEMPLATE FOR SHAREABLE LINKS

<https://polaris.odinlibrary.org/polaris/view.aspx?ctx=92&brs=39643>

Where ctx is the branch id, and brs is the bib record set id

You can find your branch id in the PAC URL (the number before the period):




You can find the bib record set id in the record set:

Bibliographic Record Set ⓘ			SAVE	ACTIONS ▾	REFRESH ↺	RESULTS	CLOSE
Name	Owner	Record Set ID					
<input type="text" value="ODN Workday Midwest Gardening_20240313131815"/>	<input type="text" value="North Border - Walhalla School Library (br)"/>	<input type="text" value="35963"/>					

A SHAREABLE LINK PROVIDES PAC SEARCH RESULTS

Library

Large Text



WEST FARGO
PUBLIC LIBRARY

Library Info


Search

My Account

Help

Boolean search:

brs=39643



More Libraries:

ODIN Polaris Libraries

Select Other Libraries

More Search Options


1 - 7 of 7


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PER PAGE

SORT

Relevance





2010

★★★★★ (2306)

Lexile: 460

1. Pete the Cat : I love my white shoes

by Litwin, Eric.

Format: Book

Call Number: PB Litwin

Local Availability: 0 (of 1)


System Availability: 12 (of 18)

Summary: Pete the Cat goes walking down the street wearing his brand-new white shoes. Along the way, his shoes change from white to red to blue to brown to WET as he steps in piles of strawberries, blueberries, and other big messes! But no matter what color his shoes are, Pete keeps movin' and groovin' and singing his song... because it's all good.


Publisher, Date: New York : Harper, 2010.

Series: Pete the cat


Target Audience Note: 4-8.



AVAILABILITY





FULL DISPLAY



PLACE REQUEST

Add to My List





1997

★★★★★ (1178)

Lexile: 320

2. There was an old lady who swallowed a fly

by Taback, Simms.

Format: Book


Call Number: PB Taback

Local Availability: 0 (of 1)


System Availability: 14 (of 15)

Summary: Presents the traditional version of a famous American folk poem first heard in the U.S. in the 1940's with illustrations on die-cut pages that reveal all that the old lady swallows.


Publisher, Date: New York : Viking, 1997.



AVAILABILITY



FULL DISPLAY



PLACE REQUEST

Add to My List

USING RECORD SETS WITH THE PAC

Bibliographic record sets can be used to create a web part for the Pac

Bibliographic record sets can be used to create carousel in the Pac

Tips:

- Must be a bibliographic record set
- Ownership of the set must be at the branch or library level
- Carousels can have up to 50 titles
- Open a Helpdesk ticket and include: Bib record set ID, whether you want a carousel or a web part, and any other helpful details.



CAROUSELS AND WEB PARTS

Library
Large Text
Log In

WEST FARGO
PUBLIC LIBRARY

Library Info
Search
My Account
Help

Quick library search:

New Adult Books Carousel

Lost & Hound : a novel
Brown, Rita Mae,
author.

Leave no trace : a national parks thriller
Landau, A. J.,
author.

The Turtle House : a novel
Churchill, Amanda,
author.

Supercommunicators : how to unlock the secret I...
Duhigg, Charles,
author.

A love song for Ricki Wilde
Williams, Tia,
1975- autho...

Untangle your emotions : naming what you feel a...
Allen, Jennie,
author.

Hit 'em & Hurts : save der...
Bitecofer autl

Web Part

- Digital Books & Media
- New Titles
- Reading Recommendations
- Book Club in a Bag
- Suggest Items for Purchase
- Interlibrary Loan Request

TIPS & TAKEAWAYS

- Record sets are used with three main record types: Patron, Item, Bibliographic.
- If you want additional information about the records, use Simply Reports and the tab that corresponds to the record type.
- Set the ownership of a record set to the branch level so you will be able to export the set to a spreadsheet, or to set up a PAC carousel or web part. If the set is for your own use, you can leave the ownership at your username.
- If you are having trouble creating a record set, please contact the [ODIN helpdesk](#)



THANK YOU

The recording and slides for this presentation will be available on the ODIN webpage in a couple of days!