

NC Cardinal

10th Annual Report: FY 2021-2022



NC Cardinal is a program of the State Library of North Carolina, supported by grant funds from the Institute of Museum and Library Services under the provisions of the Federal Library Services and Technology Act.

Outline:

- Annual Statistics
- Resource Sharing
- Student Access Project
- Project Activities and Committee Work
- Library Migrations
- Staff Survey and Support Activity
- Upcoming Projects

The Cardinal Team

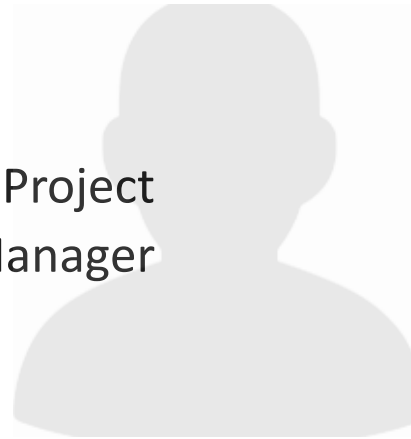


Courtney Brown
Systems Librarian

Benjamin Murphy
Program Manager



NC Cardinal Project
Manager



Llewellyn Marshall
Application
Administrator /
Developer

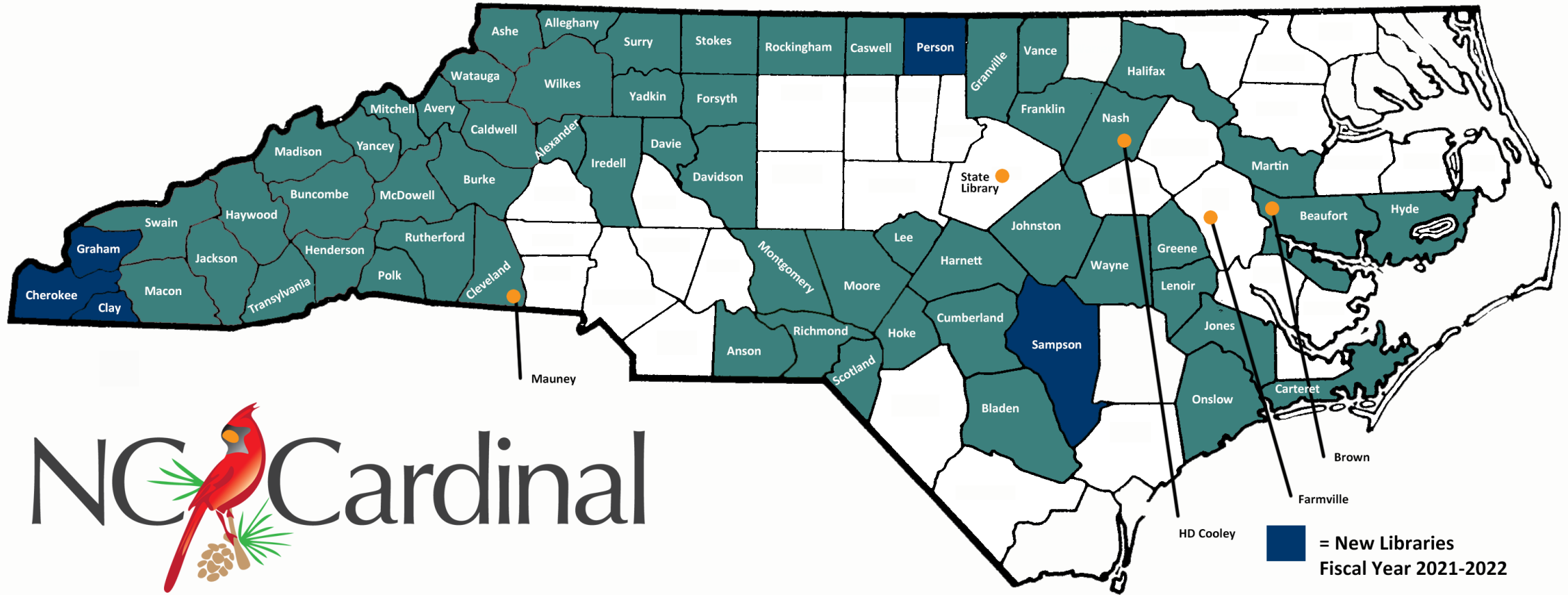
Samantha O'Connor
Training Specialist





Year In Review

NC Cardinal in 2021-2022

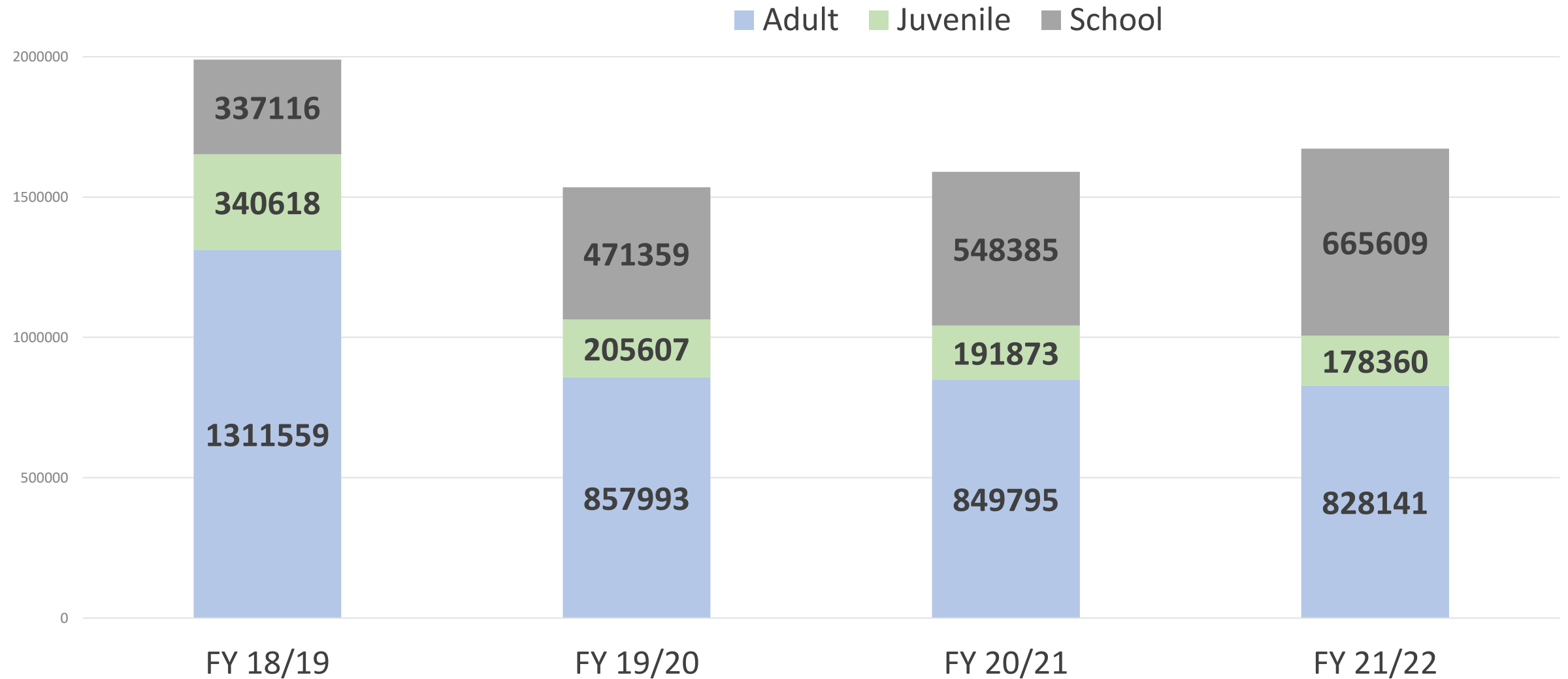


56 counties, 4 municipalities, 7 Special Libraries
202 branches

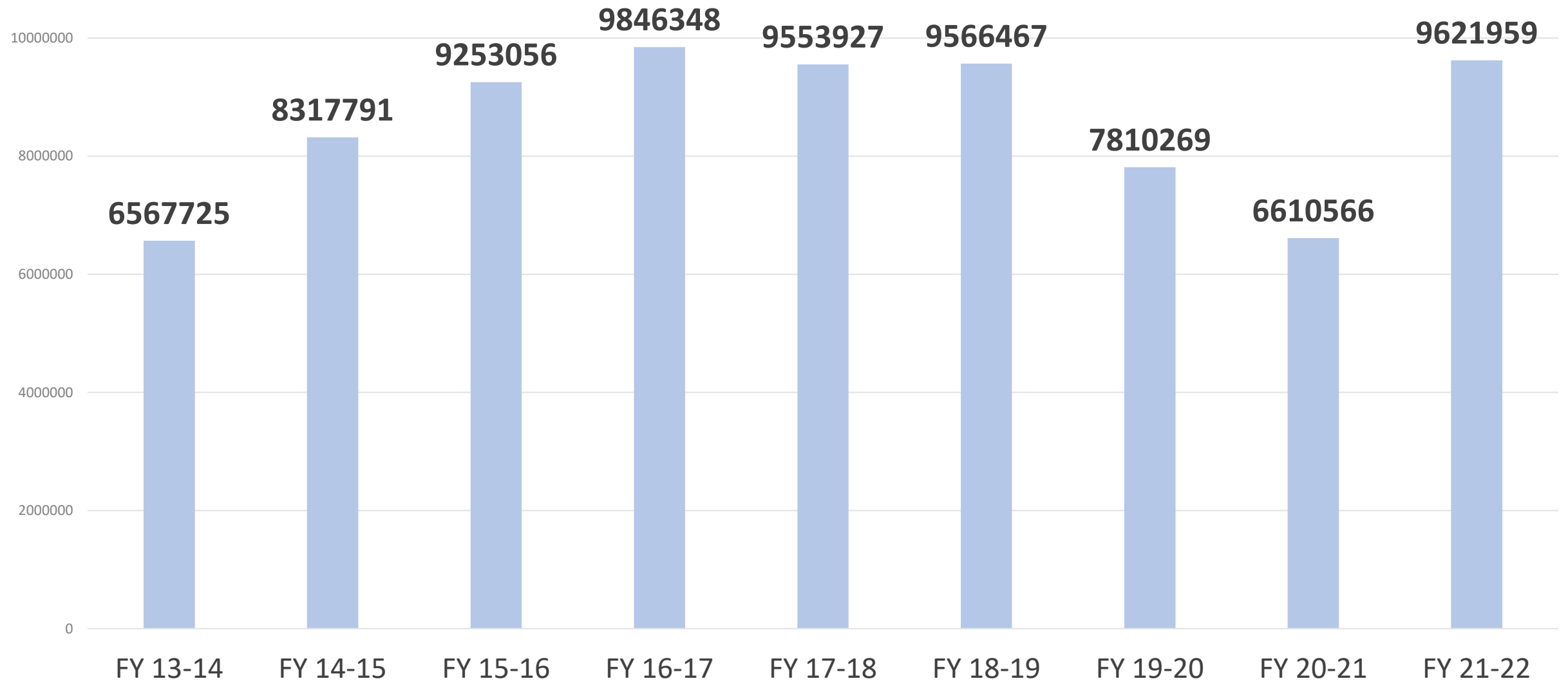


61 counties, 4 municipalities, 7 Special Libraries
210 branches

Active User Accounts: Last Four Years



Circulation Totals



Circulations: Last Five Years

1000000

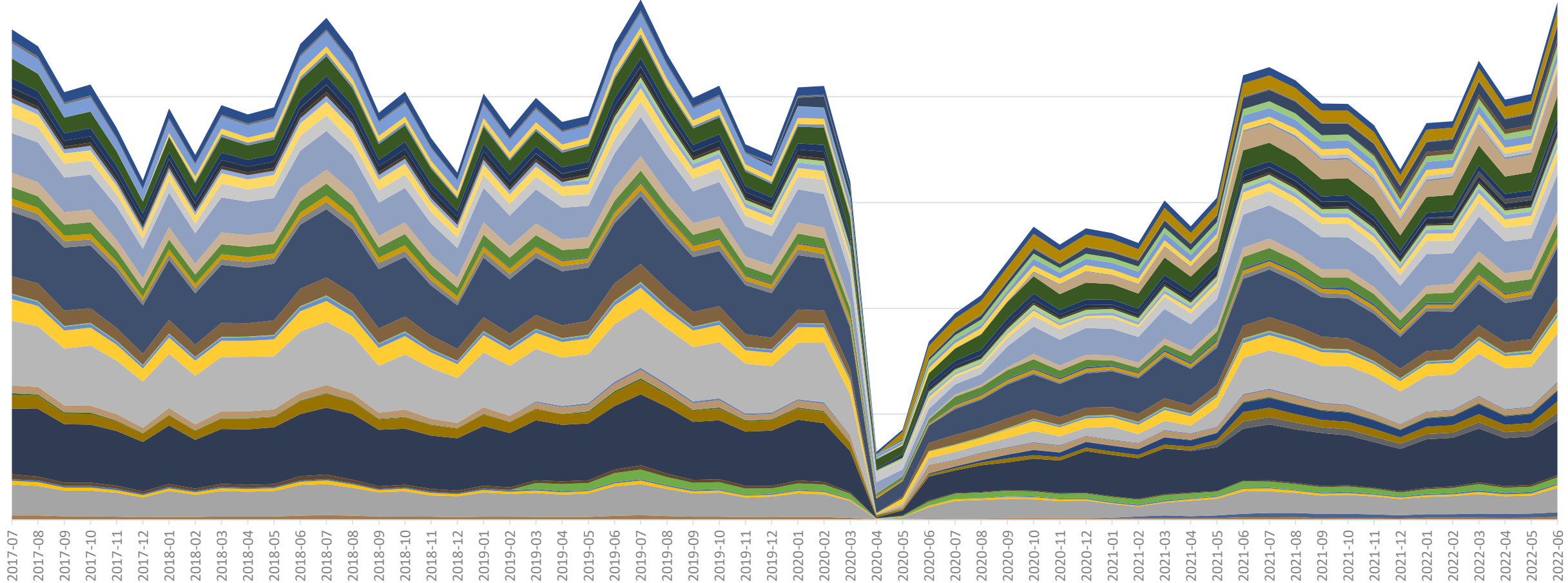
800000

600000

400000

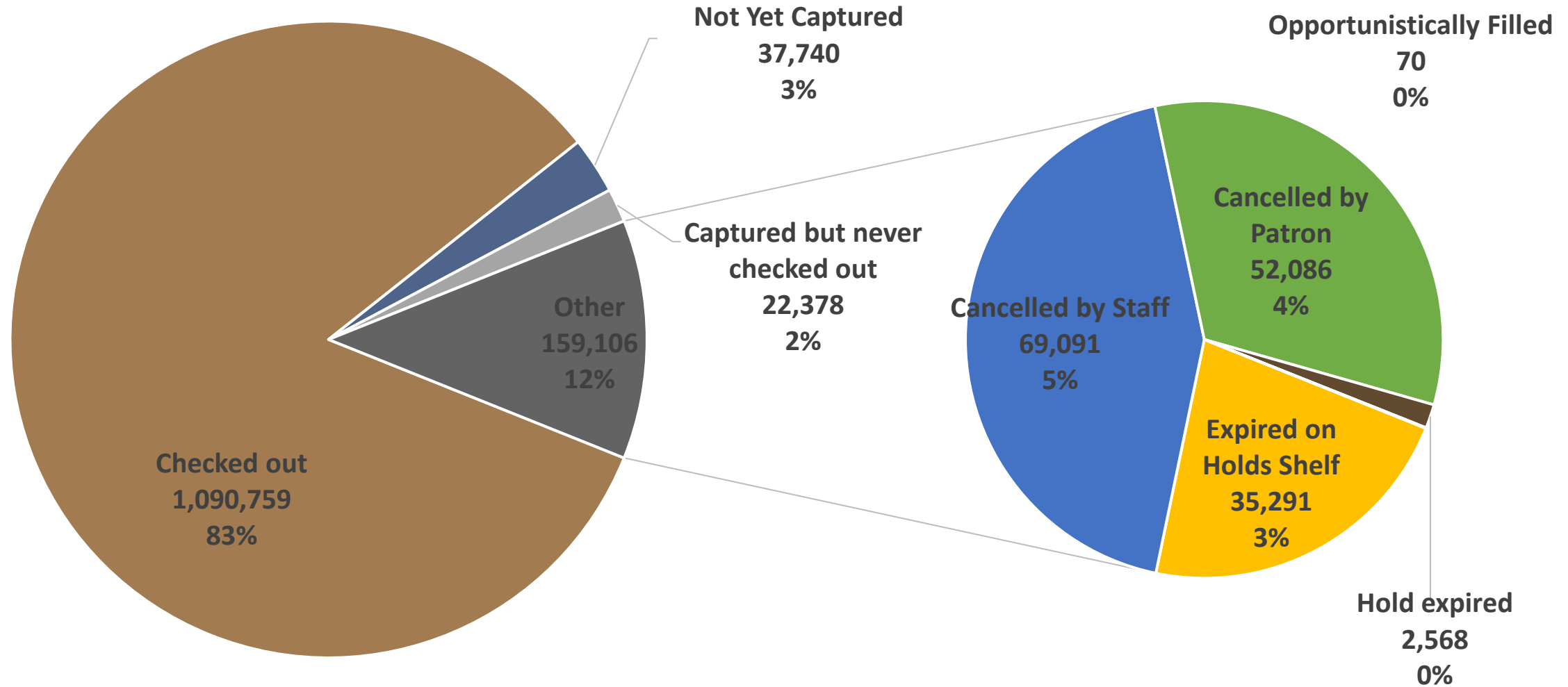
200000

0



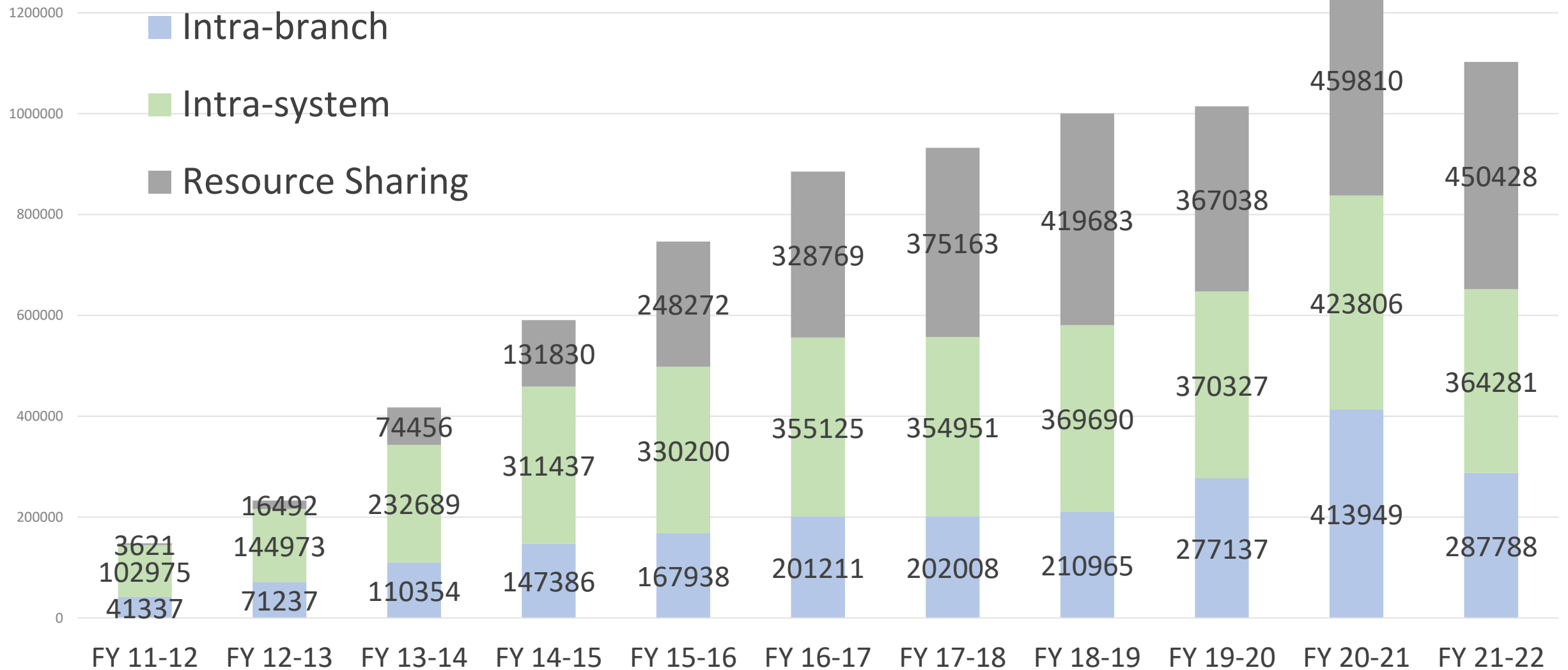
- | | | | | | | | | | | | |
|-----------|-----------|-------------|----------|------------|------------|---------|----------|-----------|--------------|----------|--------------|
| ALEXANDER | AMY | APPALACHIAN | BHM | BLADEN | BRASWELL | BROWN | BUNCOMBE | BURKE | CALDWELL | CARTERET | CASWELL |
| CLEVELAND | COOLEY | CUMBERLAND | DAVIDSON | DAVIE | FARMVILLE | FONTANA | FORSYTH | FRANKLIN | GRANVILLE | HALIFAX | HARNETT |
| HAYWOOD | HENDERSON | IREDELL | JOHNSTON | LEE | MADISON | MAUNEY | MCDOWELL | NANTAHALA | NC_GOV | NEUSE | NORTHWESTERN |
| ONSLOW | PERRY | PERSON | POLK | ROCKINGHAM | RUTHERFORD | SAMPSON | SANDHILL | SCOTLAND | TRANSYLVANIA | WAYNE | |

Outcome of Hold Requests



Total Hold Requests: 1,309,983

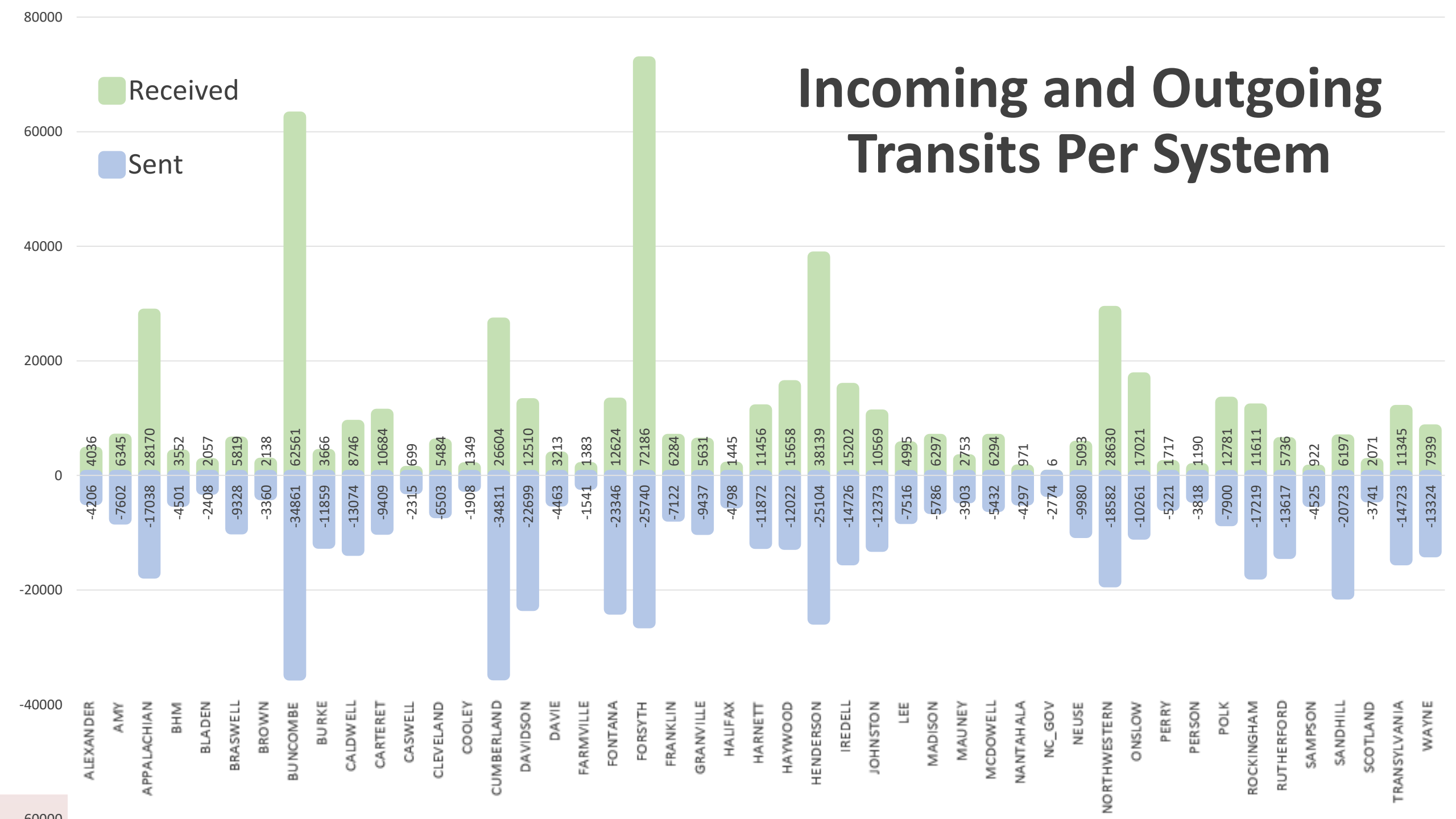
Source of Fulfilled Holds



Incoming and Outgoing Transits Per System

Received

Sent



Resource Sharing: Move to FedEx



FedEx



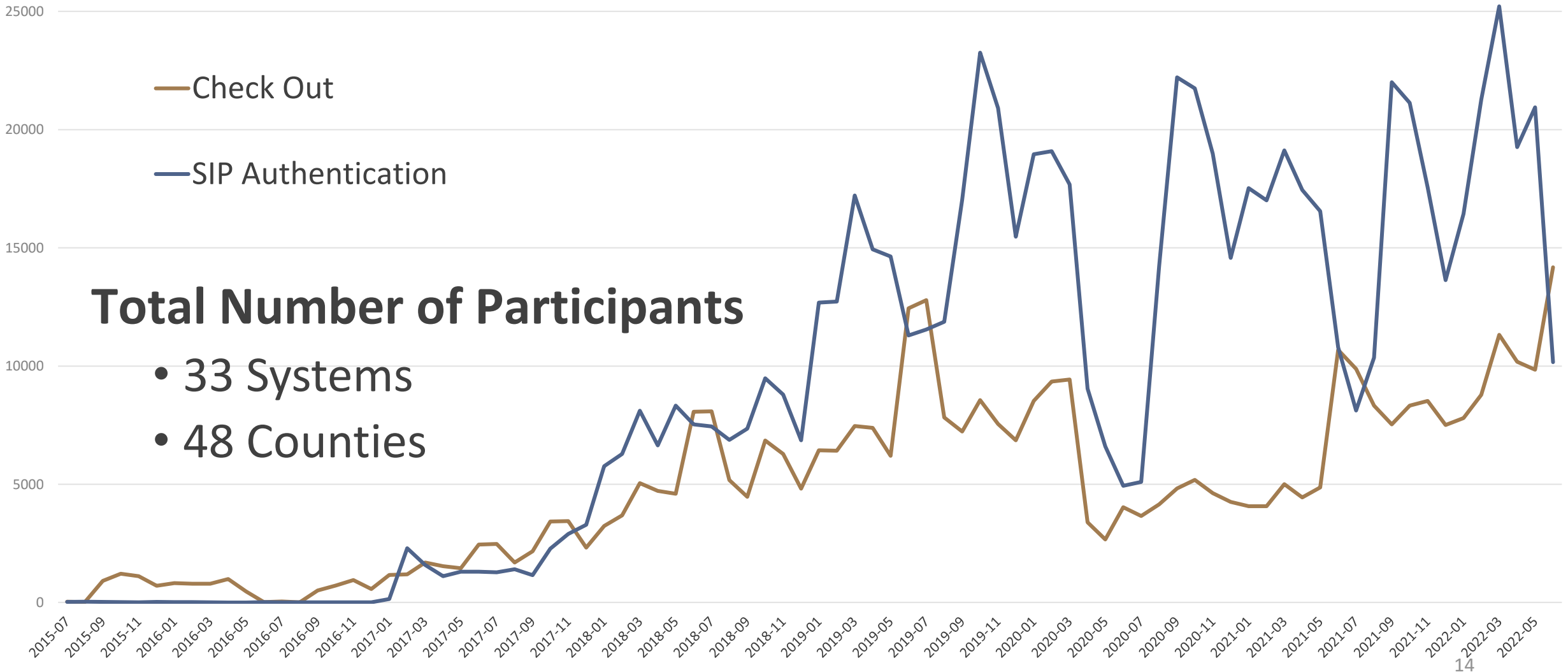
Student Access

Student Access Activity

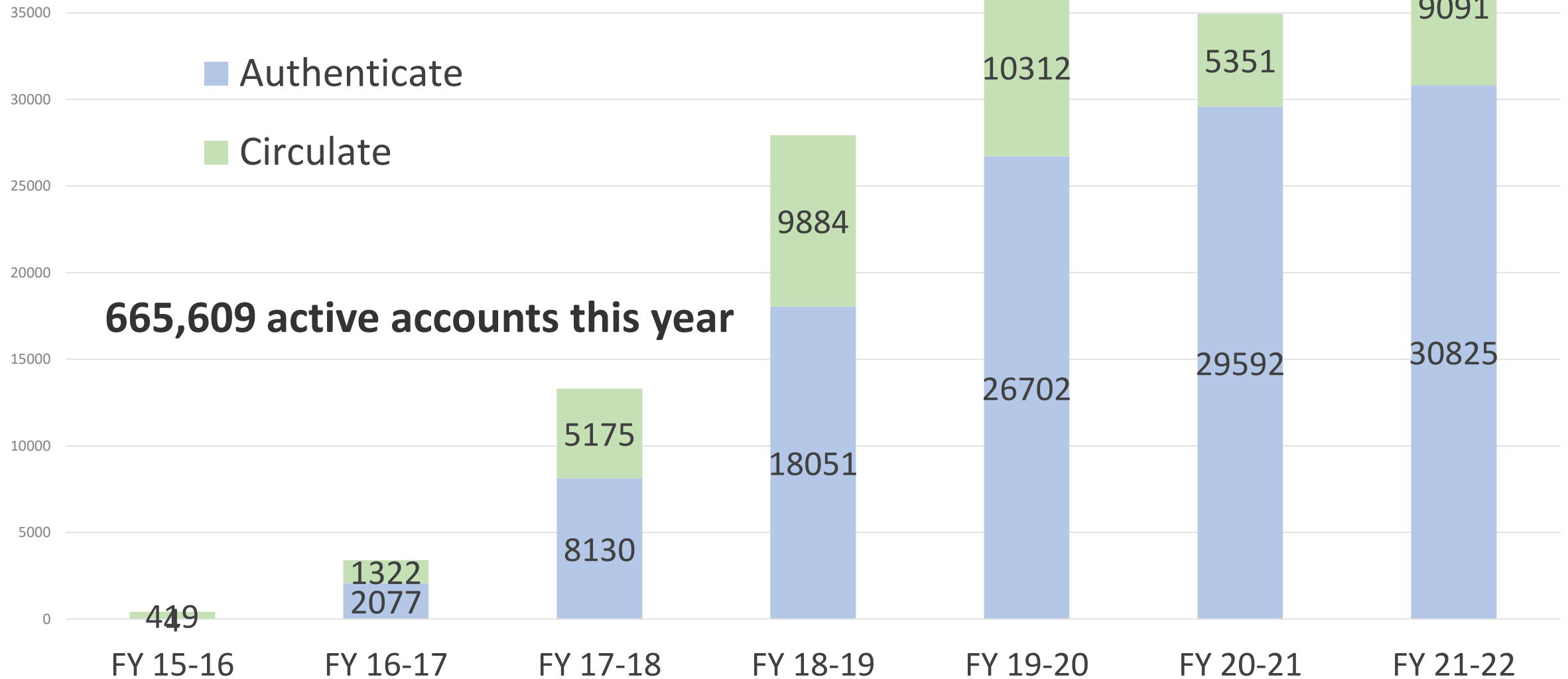
— Check Out
— SIP Authentication

Total Number of Participants

- 33 Systems
- 48 Counties



Student Access Distinct Users

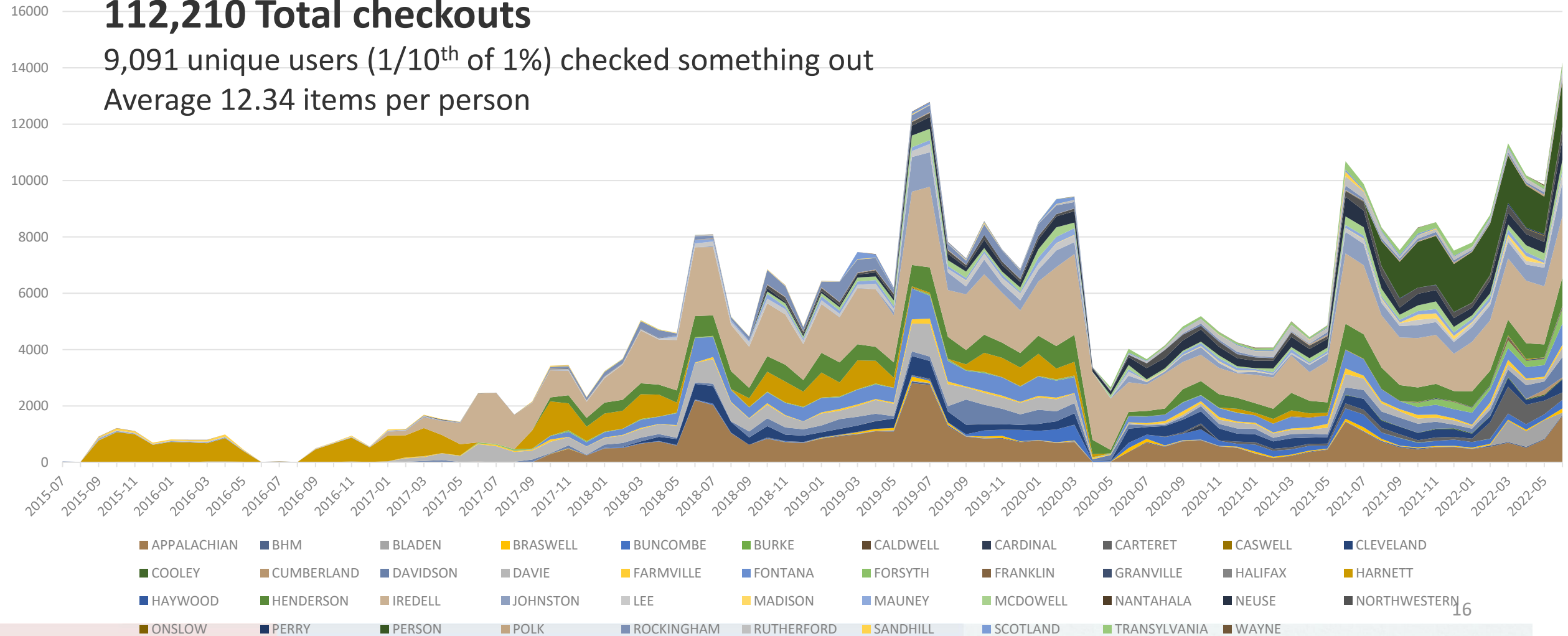


Student Access Circulations

112,210 Total checkouts

9,091 unique users (1/10th of 1%) checked something out

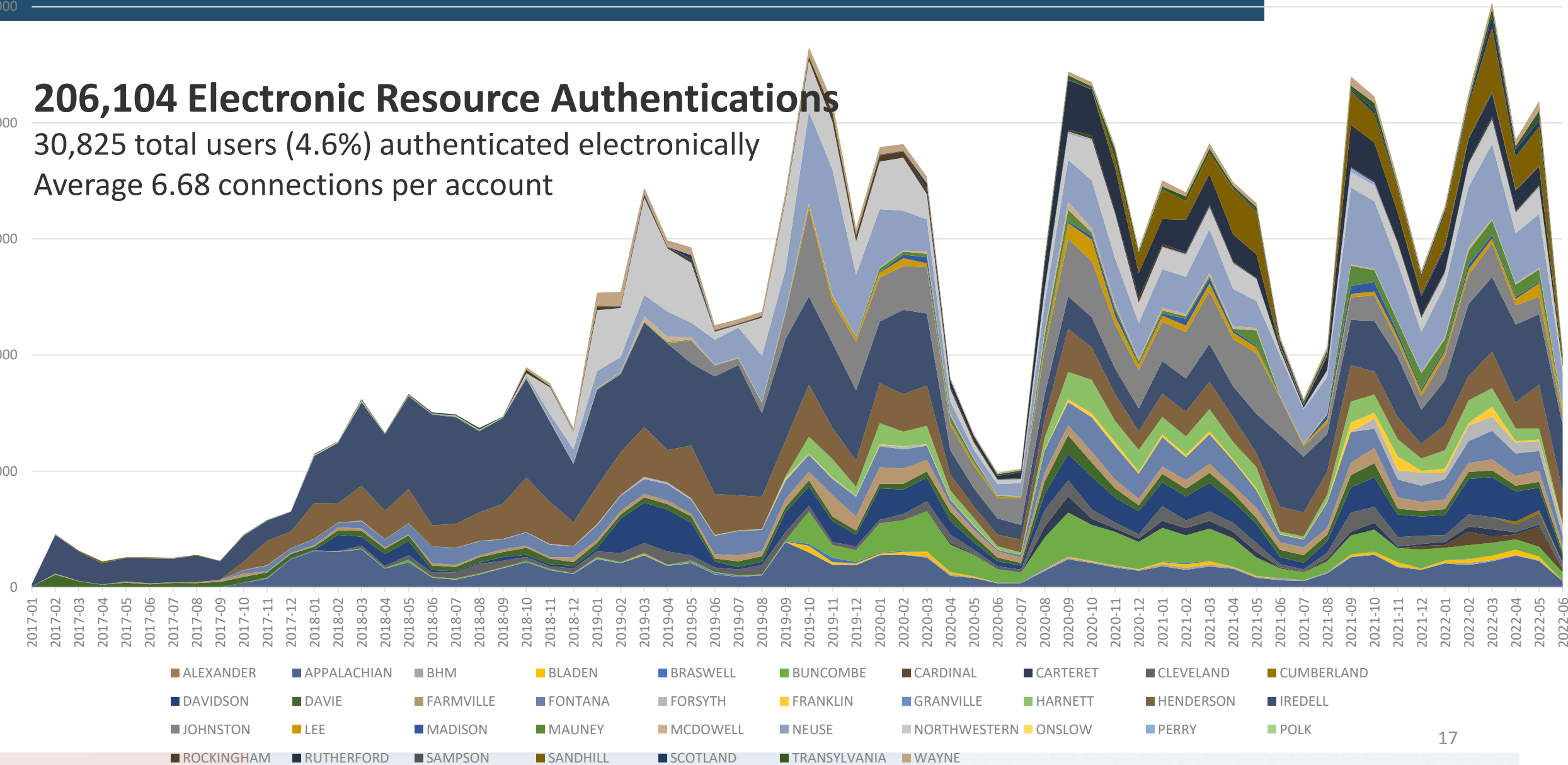
Average 12.34 items per person



Student Access Authentications

206,104 Electronic Resource Authentications

30,825 total users (4.6%) authenticated electronically
Average 6.68 connections per account





Projects & Activities

Digital Signature

If Under 18, Parent/Legal Guardian Fill Below

*I have read the Library's Internet and Wi-Fi Access Policy and wish to give my child the following access to the Internet or other online services:
I understand that the Library does not accept responsibility for my child's choice of Library materials including electronic content and that I am responsible for the materials borrowed by my child and any fines or fees accrued on them until the youth turns 18. At that time, any outstanding charges on the youth card will be transferred to my adult Library card account. Please sign your name as written agreement of this statement.*

Parent/Guardian Sign off ☐

Parent/Guardian Signature

Submit Registration

Go Back

A digital signature of a parent or guardian must be supplied to create a library card for them.

On the pending patron page, staff must verify that the digital signature is accurate before submitting the form.

Password

3235

Generate Password

Primary Name

Preferred Name

Prefix/Title

First Name

Tom

Middle Name

Last Name

Clancy

Suffix

Electronic Signature

Tom Clancy Sr.

Signature of Parent/Guardian (If Under the Age of 18)

☐ verify signature (required)

Name Keywords

Password Policy Pt. 1

Your password is **21 days** old. It is recommended that passwords be updated every **8 days**.

Update Password

Circulation and Patrons



Check Out Items



Check In Items



Search For Patron By Name

Item Search and Cataloging

Search Catalog



Record Buckets



Item Buckets

Administration



Evergreen Documentation



Workstation Administration



Reports

Alerts on the splash page alert staff about the need to update their password.

Check Out

Items Out (0)

Holds (0 / 0)

Bills (\$0.00)

Messages (0)

Edit

Other ▾

Show: **Required Fields** Suggested Fields All Fields

Patron Edit

Barcode

[Redacted]

Replace Barcode

See All

OPAC/Staff Client User Name

[Redacted]

Password

[Redacted]

Generate Password

Password last changed **1285 day(s)** ago

The user edit page will show staff how many days it has been since the user updated their password, or if they've never updated their password since migration.

Password Policy Pt. 1

Open in New Window Refresh

Event Definitions Hooks Reactors Validators

Trigger Event Definitions

Owning Library CARDINAL

Name Password Updated Email

Hook au.passwd_changed

Processing Delay 76 days

Reactor SendEmail

Validator PatronOldPassword

Definition ID 1342

Template

```
[%- profiles = [ 45, 10, 9, 5, 4, 12 ] -%]  
[%- USE date -%]  
[%- user = target -%]  
[%- profile = user.profile -%]  
[%- IF profiles.grep('^$profile$').size -%]  
To: [% user.email %]  
From: [% helpers.get_org_setting(user.home_ou, 'org.bounced_emails') ||  
params.sender_email || default_sender %]  
Subject: Your NC Cardinal Password Must be Updated  
  
Hi [% user.first_given_name %],  
To maintain the security of your account, passwords for staff login accounts are  
required to be changed every 90 days. You can change your password by logging into  
the My Account link on your library's online catalog. If you have difficulties,  
please contact your library's System Login Access Manager.  
[%- END -%]
```

A new email notice will tell staff members every 76 days that they need to update their password.

Holds Project Progress

- Input longitude and latitude for all branches in the consortium
- Created new database tools to analyze the distance that material is traveling
 - Added shipping hub information
 - Calculated driving routes between shipping hubs
- Hold reset notes
- Hold reset notes do-over

Bug Fixes

Sort by Relevance ☐ Limit to Available ☐ Group Formats/Editions ☐ Results from All Libraries

☐ Exclude Electronic Resources

Music
Audiobook
Video

Maps

All Item Forms
Braille
Direct electronic
Electronic

Creeoles and Pugins, Portugue
Crimean Tatar (Hidden)
Croatian (Hidden)
Cushitic (Other) (Hidden)
Czech (Hidden)

Age 0-5 yrs
Age 6-8 yrs
Specialized (Hidden)
Unknown or unspecified (Hidden)

All Video Formats
8 mm.
Beta
Betacam

All Bib Levels
Collection
Integrating resource (Hidden)
Item (Hidden)

Poetry
Short stories
Speeches
Unknown (Hidden)

Public Computer (CARDINAL)
Software (CARDINAL)
Stacks (CARDINAL)
Storage (CARDINAL)
Teacher Notification Resources

Publication Year is Is

Return simple sort to Angular catalog

fontana.nccardinal.org says

Patron update failed.

```
{ "stacktrace": "/usr/local/share/perl/5.26.1/OpenILS/Utils/  
CStoreEditor.pm:865 (eval 4476):1 /usr/local/share/perl/5.26.1/  
OpenILS/Application/Actor.pm:1162", "debug": "Exception:  
OpenSRF::DomainObject::oilsMethodException 2022-04-25T11:21:57  
OpenILS::Utils::CStoreEditor /usr/local/share/perl/5.26.1/OpenILS/  
Utils/CStoreEditor.pm:865 <500> INSERT error -- please see the  
error log for more details\\n", "ilsevent": "2001", "payload":  
{"_id": "actroom", "n": "full", "Macon"
```

OK

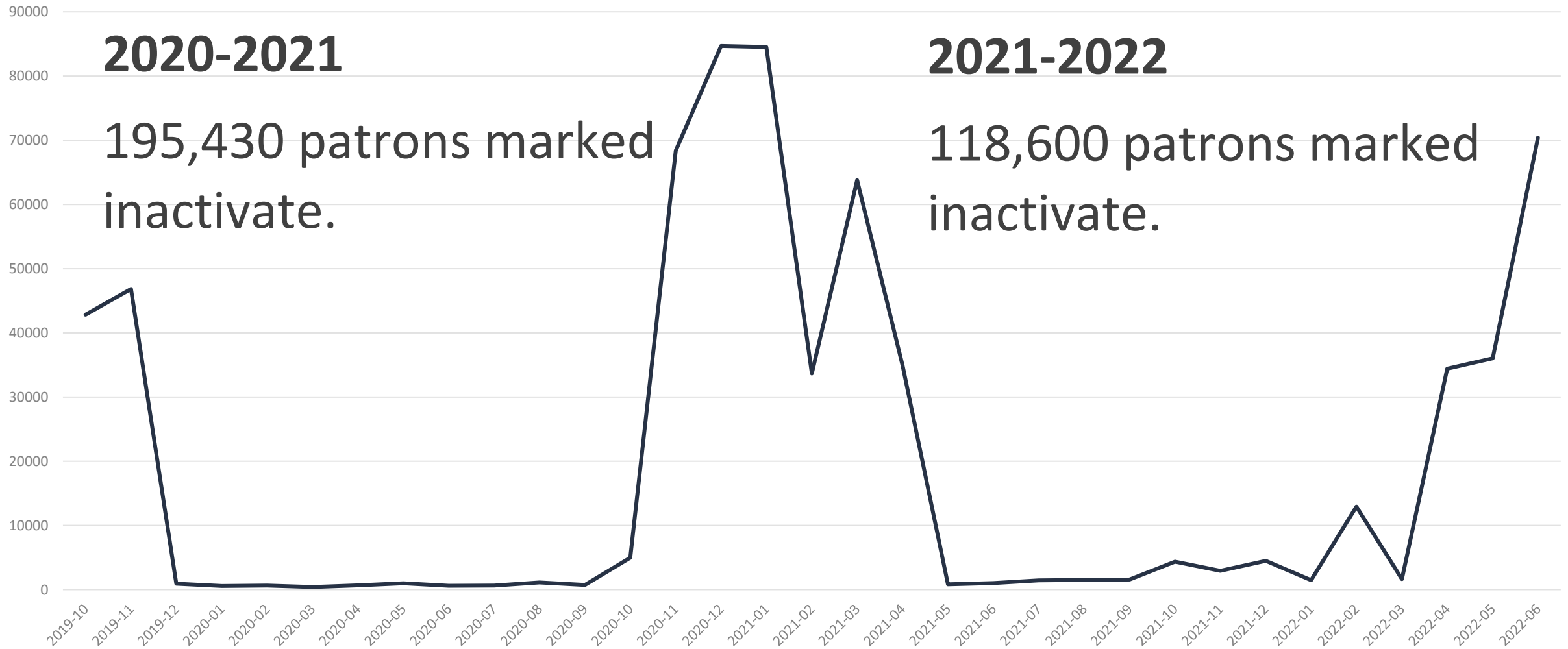
29493101614380

29493101614380

Elusive stat cat glitch

Patron Clean Up

Accounts Marked Inactive Via Patron Clean Up



Library Settings Project

Project Details

- Debuted in April '22
- Optional consultations
- Monthly cohort groups
- 29 Participants thus far

Goals

- Clean up existing consortium-wide and system specific settings
- Increase understanding of available settings
- Make sure Evergreen is working the way you want it to for you

Library Settings Categories

Large number of settings,
broken down into categories

- General
- Financial
- Cataloging
- Holds
- Patron/OPAC
- Long Overdue
- Evergreen Printing
- Credit Cards

User Experience Committee 21-22

Projects for this Past Year

- Fall 2021 Upgrade to 3.7.2
- Library Settings Consultations
- Staff Password Policy

- Shawna Bryce - Madison
- Lisa Sheffield - Transylvania
- Shannon Hearne - Sandhill
- Kenneth Odom - Rutherford
- Joy Cecil-Dyrkacz - Davidson
- Justin Stout - Neuse Regional
- Matthew Mano - Onslow

User Experience Committee 22-23

Projects for this Past Year

- Fall 2022 Upgrade to 3.9.1
- Projects inspired by Annual Survey Responses
 - OPAC Accessibility Review
 - Kenneth Odom - Rutherford
 - Joy Cecil-Dyrkacz - Davidson
 - Justin Stout - Neuse Regional
 - Matthew Mano - Onslow
 - Cheryl Middleton - Buncombe
 - Nastassia Debnam - Perry
 - Jamie Stroble - Forsyth

Cataloging Committee Members

- Jessica Efron – NC Govt
- Heidi Flythe – Braswell
- Wanangwa Hartwell – Polk
- Kathryn Nesbit – Forsyth
- Jessica Philyaw – Fontana
- Will Szwagiel – Wayne
- Mary Wilson – Carteret

Book Deduplication Project

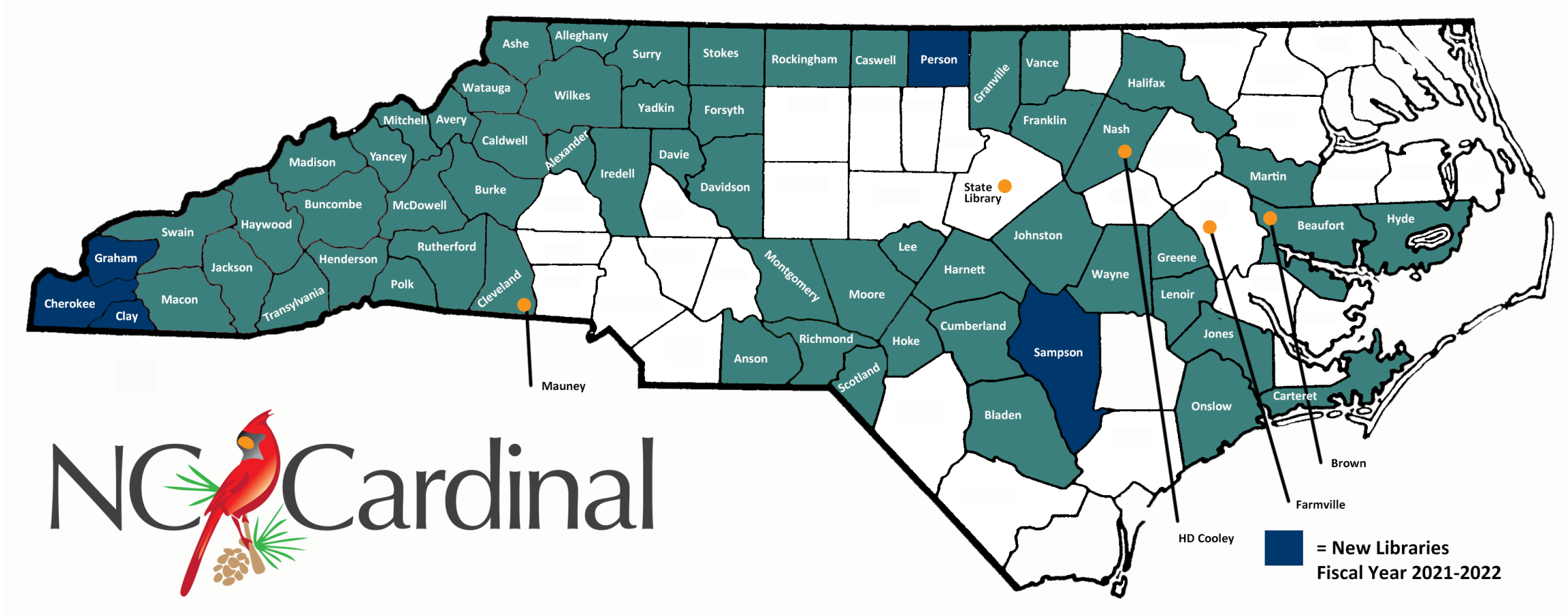
Lead Bib	Sub Bib	Lead Bib Link	Sub Bib Link	Lead Icon	Sub Icon	Lead Bib library w	Sub Bib library wi	Title
3248	9093165	http://nccardinal.org/eg/	http://nccardinal.org/eg/	book	book	BROWN_MAIN,DUNN,MA	SMITHFIELD	On the outside looking in !! C
3264	9089127	http://nccardinal.org/eg/	http://nccardinal.org/eg/	lpbook	lpbook	AVERY,CLEVELAND_MAIN	FOUR_OAKS,KENLY	30,000 on the hoof
3265	13446485	http://nccardinal.org/eg/	http://nccardinal.org/eg/	book	book	BRASWELL_MAIN,CLEVEL	MOSS	Sanctuary !! Sanctuary /
3273	11508648	http://nccardinal.org/eg/	http://nccardinal.org/eg/	book	book	EDEN,MAD_MAYO,MOCK	MARSHALL,MARS_HILL	Riders of the purple sage !! R
3273	13109036	http://nccardinal.org/eg/	http://nccardinal.org/eg/	book	book	EDEN,MAD_MAYO,MOCK	PERSON_MAIN	Riders of the purple sage !! R
3273	13382116	http://nccardinal.org/eg/	http://nccardinal.org/eg/	book	book	EDEN,MAD_MAYO,MOCK	GRAHAM,NANTAHALA_B	Riders of the purple sage !! R
3560	275616	http://nccardinal.org/eg/	http://nccardinal.org/eg/	book	book	ASHE,CLEMMONS,FORSY	COOLEEMEE,LEICESTER,L	Gregory, the terrible eater !!
4006	5175234	http://nccardinal.org/eg/	http://nccardinal.org/eg/	book	book	CASHIERS,DUNN,HALIFAX	FOUR_OAKS,KENLY,SMITH	Love story.
4006	6003313	http://nccardinal.org/eg/	http://nccardinal.org/eg/	book	book	CASHIERS,DUNN,HALIFAX	AVERY,GREENE,ROBBINS,	Love story.
4311	9079273	http://nccardinal.org/eg/	http://nccardinal.org/eg/	book	book	BEAUFORT_MAIN,BHM_H	KENLY,SELMA	Raleigh's Eden !! Raleigh's Ed
4742	485494	http://nccardinal.org/eg/	http://nccardinal.org/eg/					Mississippi
5046	11709929	http://nccardinal.org/eg/	http://nccardinal.org/eg/					
5046	13383529	http://nccardinal.org/eg/	http://nccardinal.org/eg/					
5279	1705565	http://nccardinal.org/eg/	http://nccardinal.org/eg/					Our orier
5290	9055803	http://nccardinal.org/eg/	http://nccardinal.org/eg/					rous aun
5298	5038667	http://nccardinal.org/eg/	http://nccardinal.org/eg/					archbish
5298	12626264	http://nccardinal.org/eg/	http://nccardinal.org/eg/	book	book	BCPL_MAIN,BEAUFORT_I	MITCHELL,SPRUCE_PINE	Death comes for the archbish
5298	13393066	http://nccardinal.org/eg/	http://nccardinal.org/eg/	book	book	BCPL_MAIN,BEAUFORT_I	MOSS,MURPHY	Death comes for the archbish
5317	10400550	http://nccardinal.org/eg/	http://nccardinal.org/eg/	book	book	LEXINGTON,PERRY_MAIN	THORNTON	Castles of Europe !! Castles o
5794	9078082	http://nccardinal.org/eg/	http://nccardinal.org/eg/	book	book	AVERY,CLEVELAND_MAIN	BENSON	Chronicle of the 20th century
5959	10940063	http://nccardinal.org/eg/	http://nccardinal.org/eg/	book	book	ALLEGHANY,YADKIN	PERRY_MAIN	Shakespeare and his world !!
6162	5087153	http://nccardinal.org/eg/	http://nccardinal.org/eg/	book	book	BEAUFORT_MAIN,FOUR_	MT_AIRY	Working with wood !! Workin
6301	10423381	http://nccardinal.org/eg/	http://nccardinal.org/eg/	book	book	BROWN_MAIN,LEATH,MA	THORNTON	The nine days queen : !! The
6302	1503352	http://nccardinal.org/eg/	http://nccardinal.org/eg/	book	book	BHM_HQ,CARTHAGE,ERV	SANFORD	My heart belongs !! My hear
6355	994353	http://nccardinal.org/eg/	http://nccardinal.org/eg/	book	book	BCPL_MAIN,PERRY_MAIN	LOUISBURG	The high road !! The high roa

```
$fingerprints{alternate} = join("\t",
    $marc{item_form}, $marc{date1}, $marc{record_type},
    $marc{bib_lvl}, $marc{title}, $marc{subtitle}. $marc{subtitlep}, $marc{author} ? $marc{author} : '',
    $marc{audioformat}, $marc{videoformat}, $marc{pubyear}, $marc{normalizedisbns}
);
```



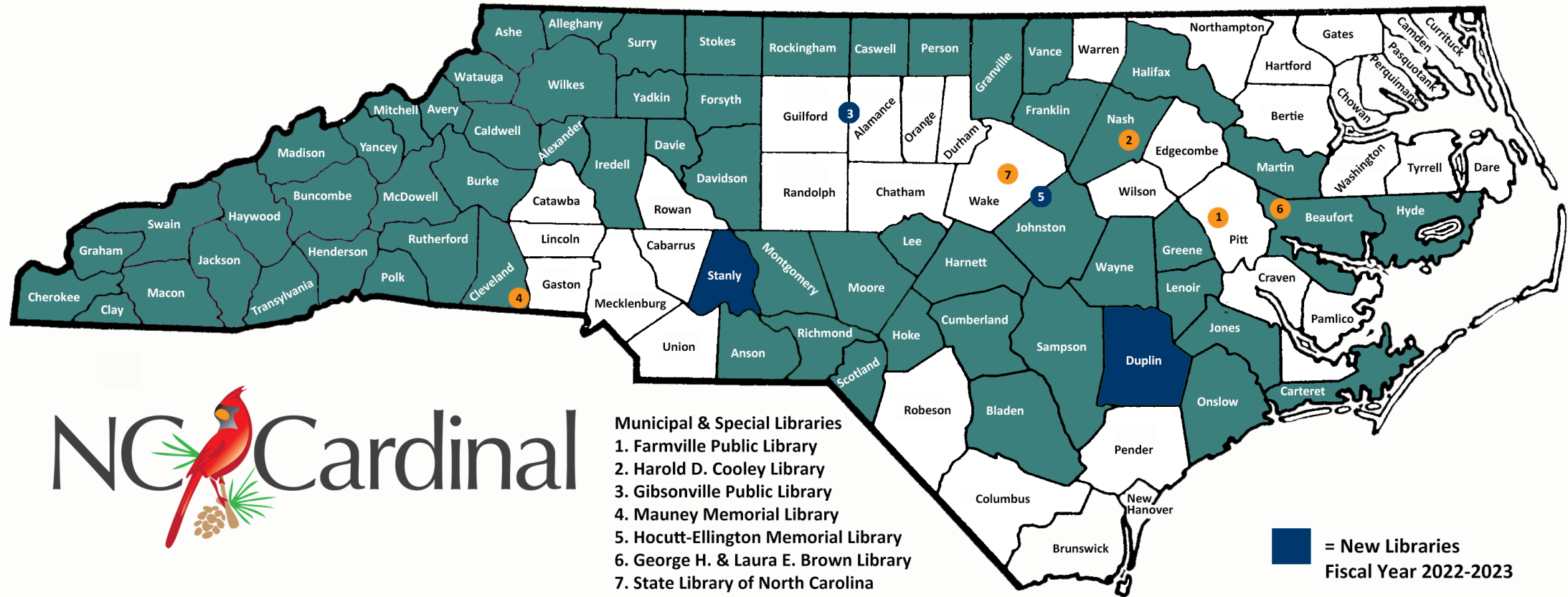
New Cardinal Libraries

Library Migration in 21-22



61 counties, 4 municipalities, 7 Special Libraries
210 branches

Library Migration in 22-23

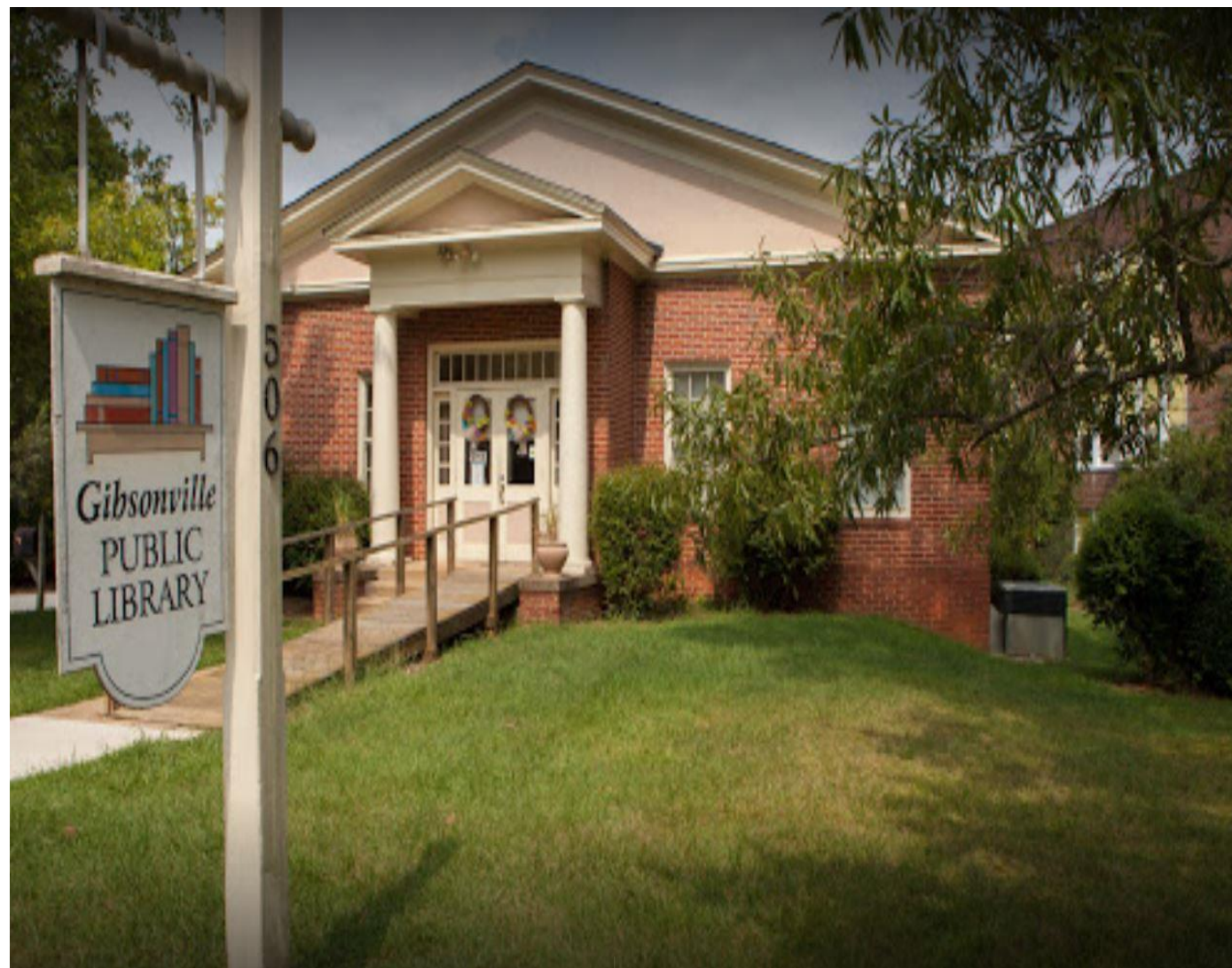


63 counties, 6 municipalities, 7 Special Libraries
224 branches



Duplin County Public Library

Gibsonville Public Library



Hocutt- Ellington Library



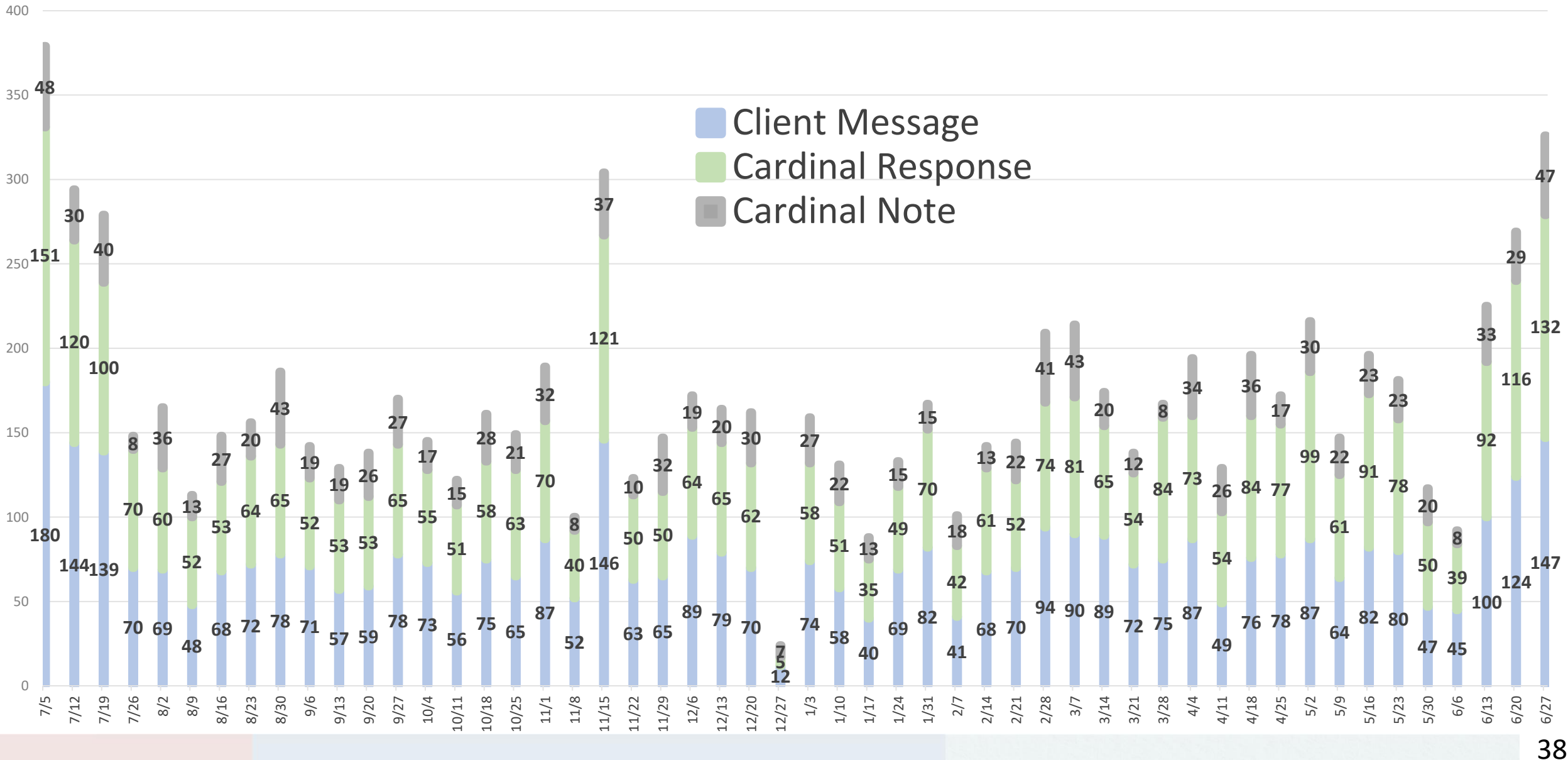


Stanley County Public Library

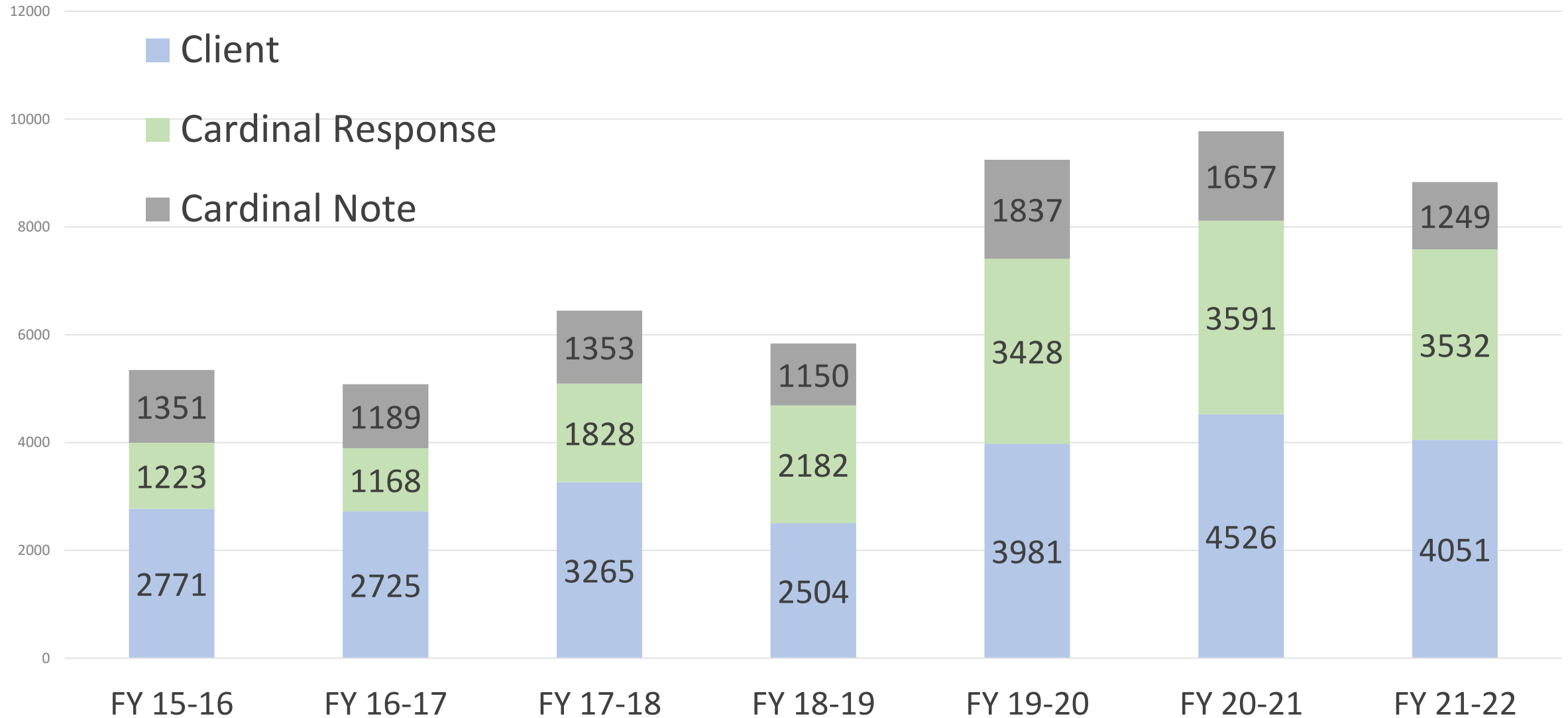


Cardinal Support Activity

Cardinal Support Activity 21-22



Cardinal Support Traffic

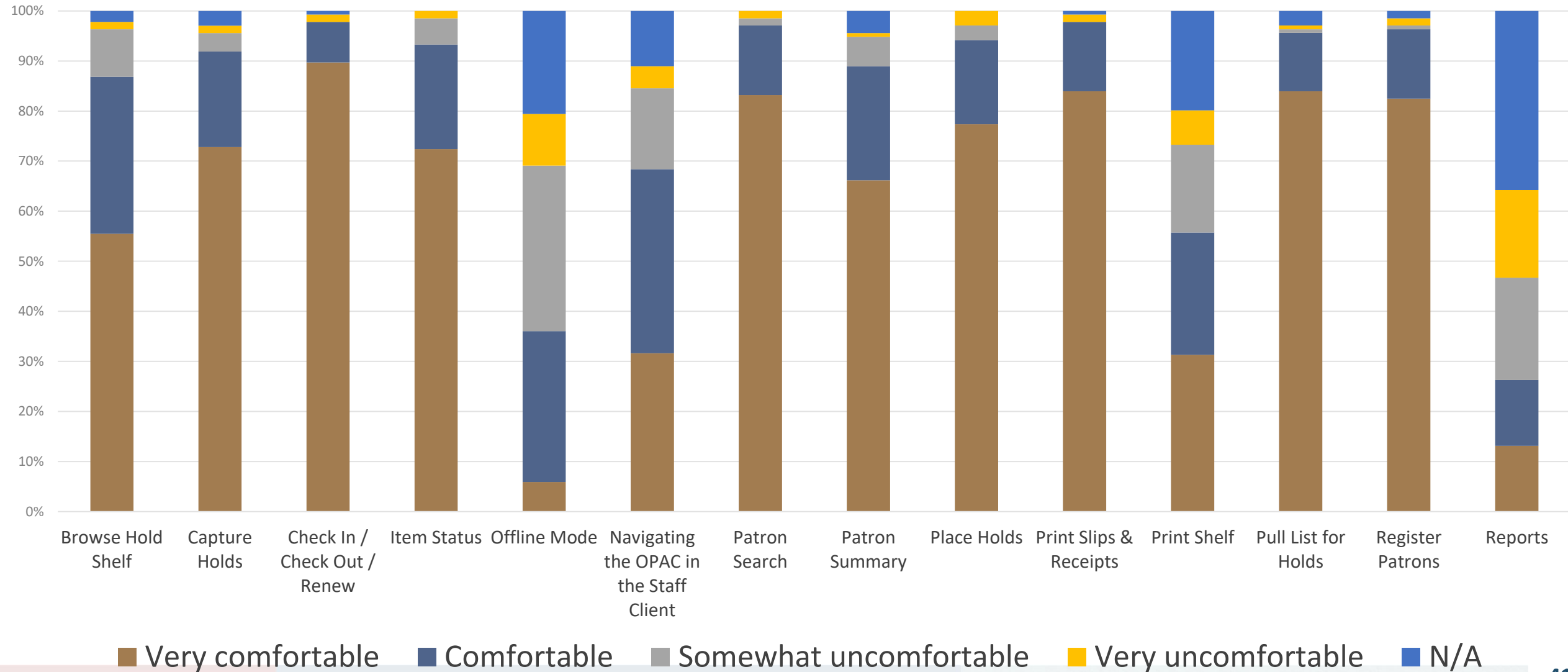


Staff Survey



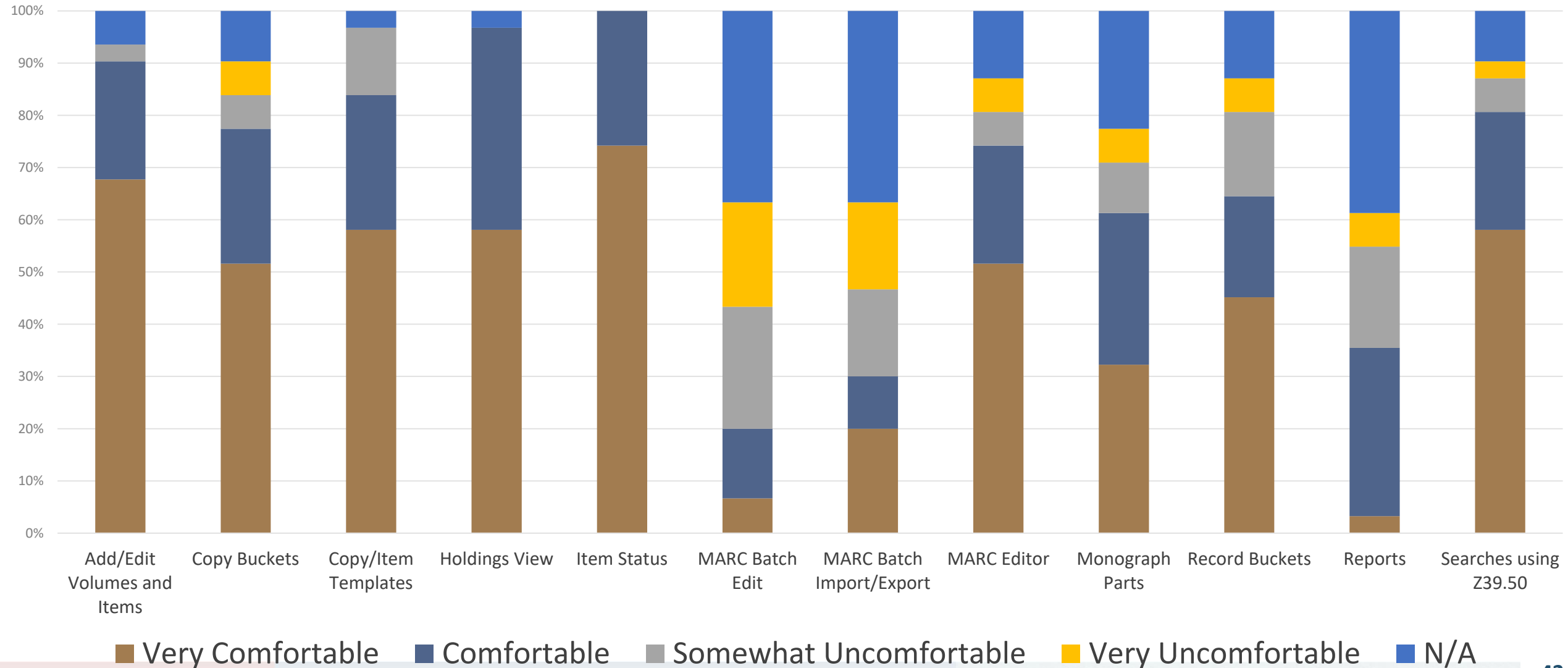
Staff Survey

How comfortable are you with using each of these circulation activities in Evergreen?



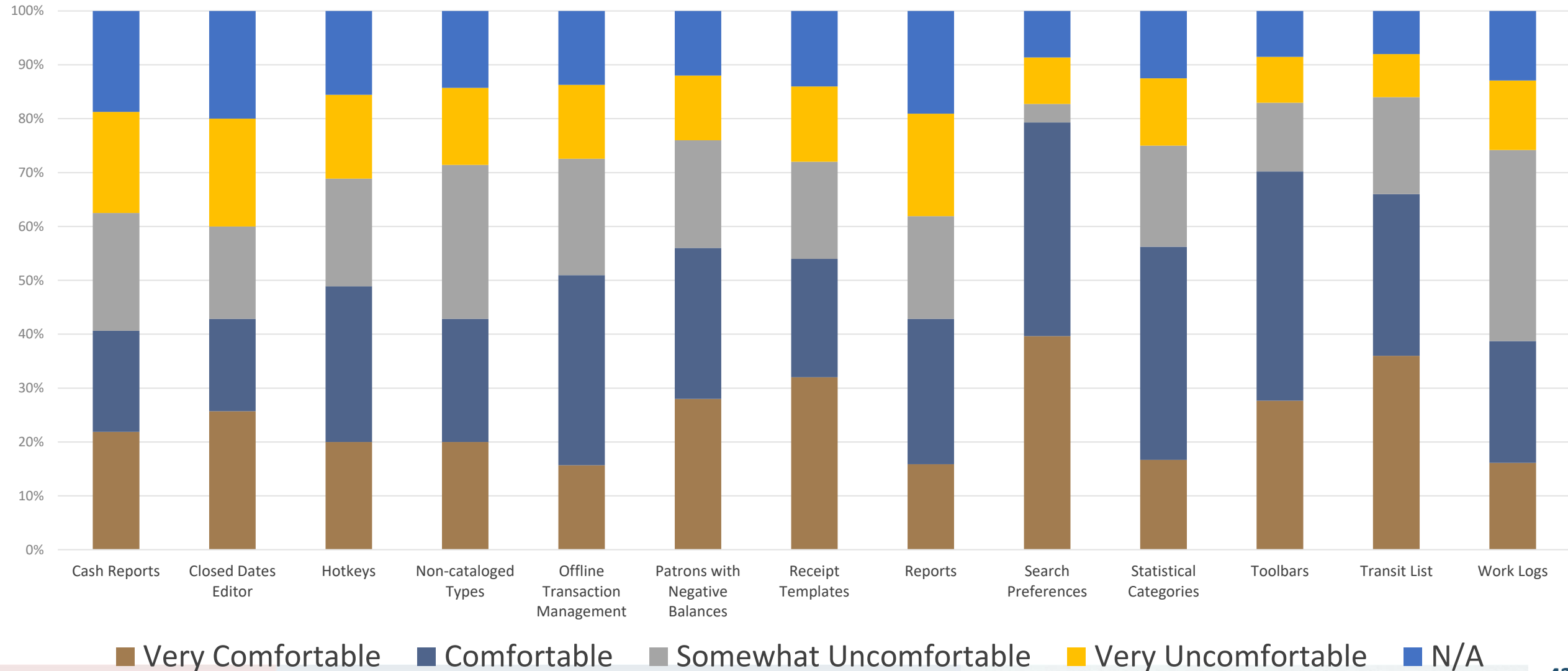
Staff Survey

How comfortable are you with performing each of these cataloging activities in Evergreen?



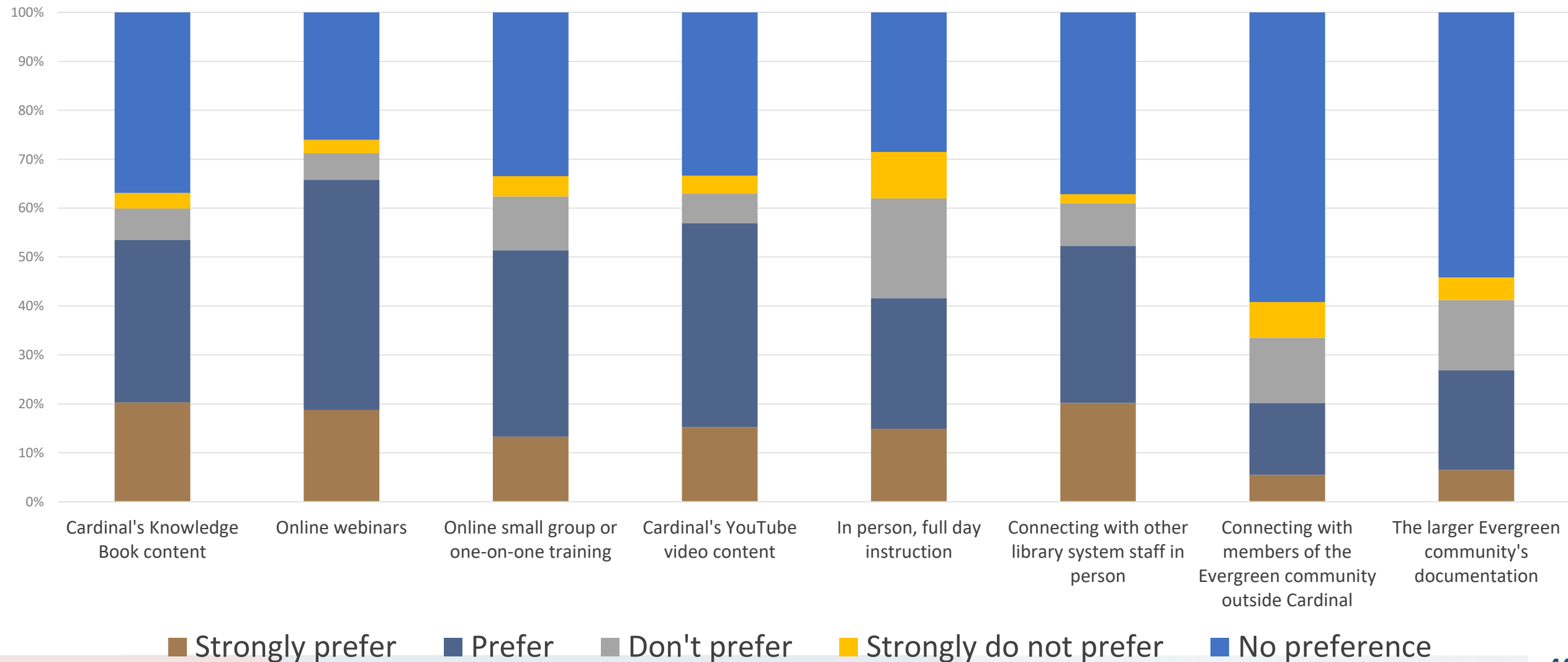
Staff Survey

How comfortable are you with using each of these administrative activities in Evergreen?



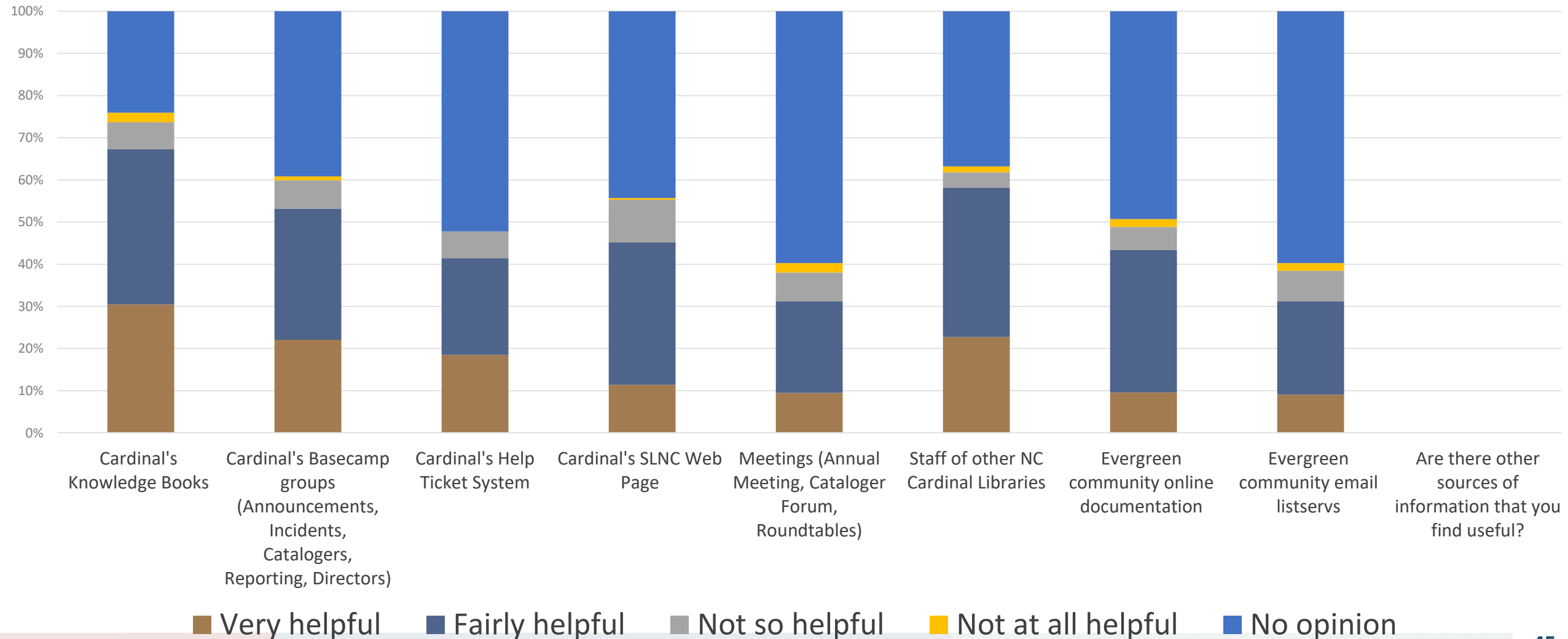
Staff Survey

Which of these training and education mechanisms do you prefer?



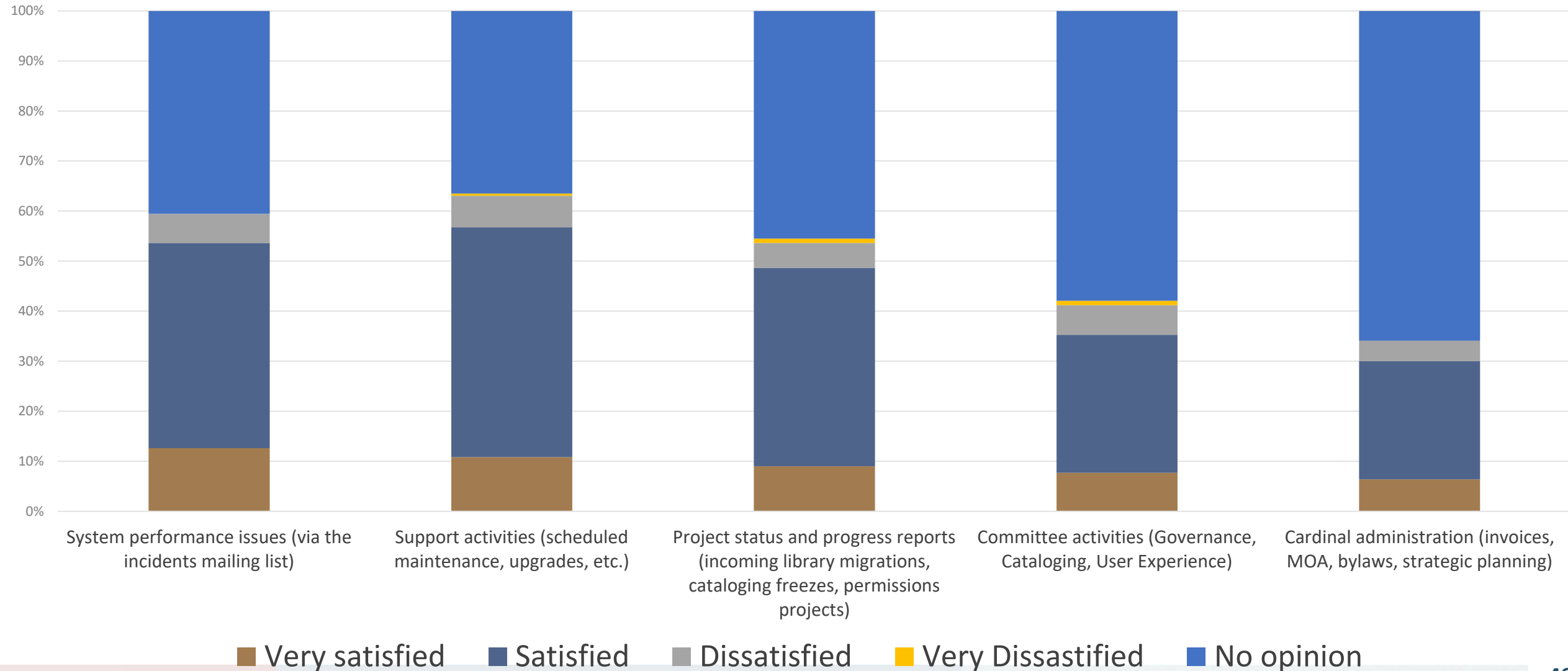
Staff Survey

How useful do you find these sources of information?



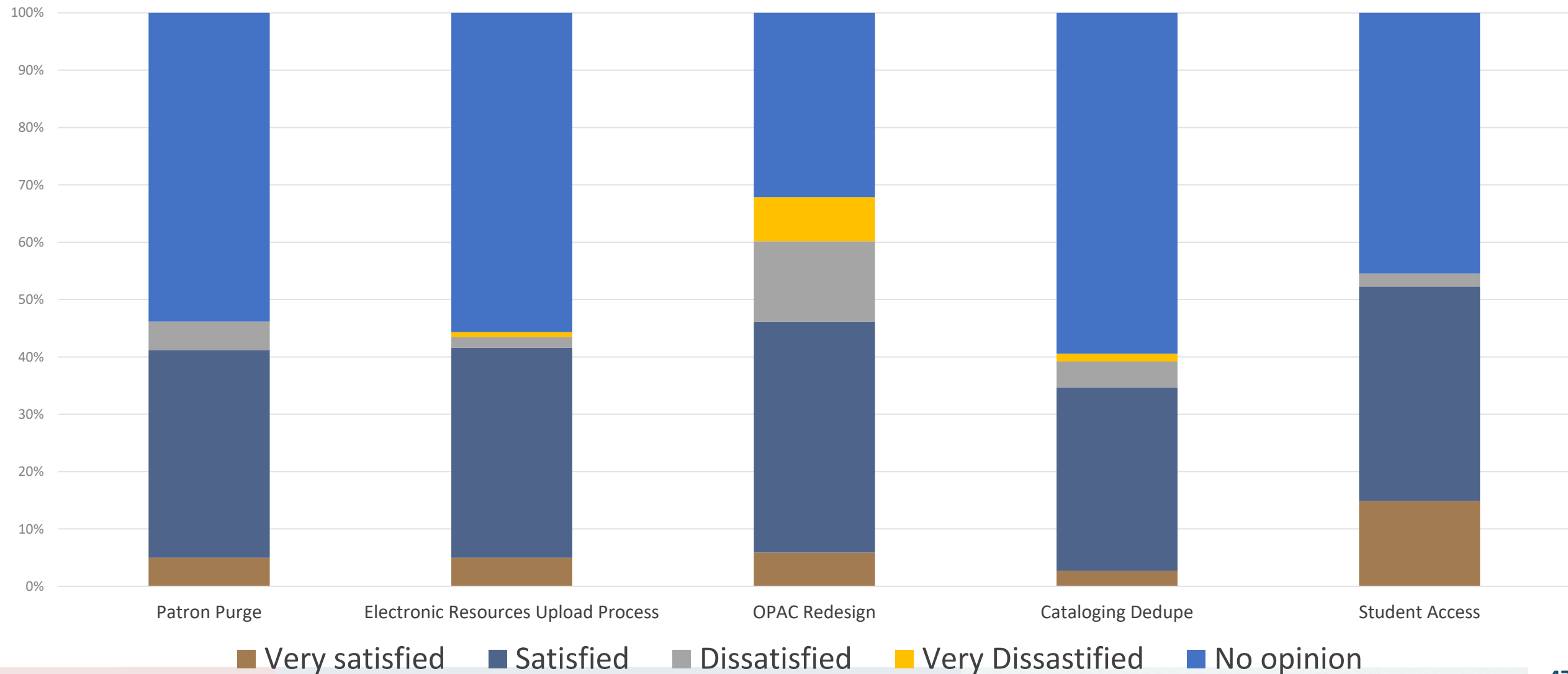
Staff Survey

How satisfied are you with communications within the NC Cardinal consortium regarding...?



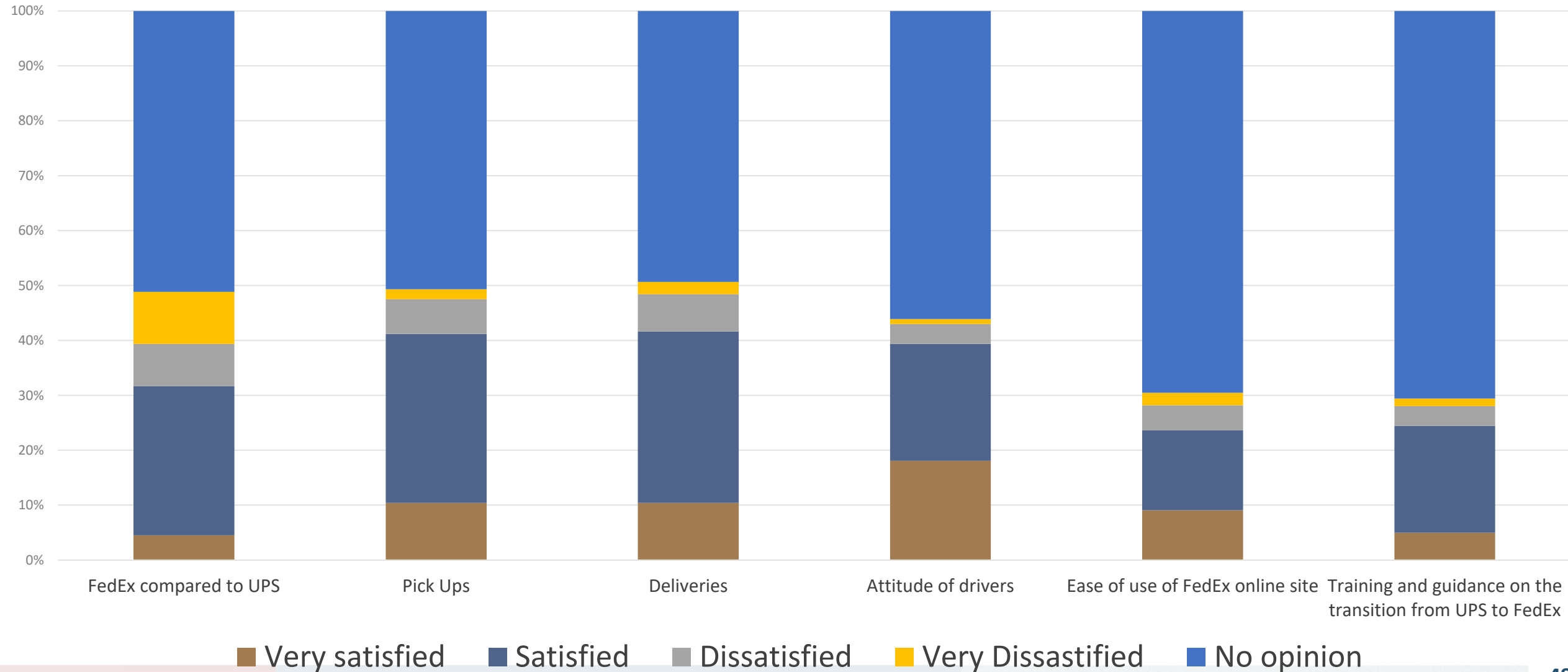
Staff Survey

How satisfied are you with project endeavors within NC Cardinal this past year?



Staff Survey

How satisfied are you with these aspects of the resource sharing process?





Some Upcoming Projects

Password Policy Pt. 2

- **More stringent requirements for passwords**
- **Check potential passwords for user's name, date of birth, common dictionary words**
- **Map password policies to users based on their permission group and home OU**

Holds Project Future

- Look into key reasons why holds are being retargeted away from local copies & prescribe changes to address that.
- Freeze new holds when pickup library closed
- Use geosorting tools within hold targeter

Chillifresh

- 30 Million book, audiobook, movie, etc. jacket cover images
- Estimated 90% coverage of items
- Upload your own cover art

◀ Previous 1 2 3 4 5 Next ▶

Results 21 - 30 of 491 (page 3 of 50)

☐ Select 21 - 30 0 selected

21 ☐		The Boxcar Children / #103 / The Sword of the Silver Knight  Book (2005.) Warner, Gertrude Chandler. Call number: WAR Boxcar.Children 103 1 of 1 copy available at St Peter School District Libraries. 1 of 1 copy available at St Peter Middle School.	✓ Place Hold Add to basket
22 ☐		The Books of beginning/ 3/ The black reckoning  Book (2016.) Stephens, John 1972- Call number: STE Books.of.Beginning 3 1 of 1 copy available at St Peter School District Libraries. 1 of 1 copy available at St Peter Middle School.	✓ Place Hold Add to basket
23 ☐		Fullmetal Alchemist / #27  Book ([2011]) Arakawa, Hiromu 1973- Call number: Ara 1 of 1 copy available at St Peter School District Libraries. 1 of 1 copy available at St Peter Middle School.	✓ Place Hold Add to basket
24 ☐		Warrior Cats: Power of Three / 1 / The Sight  Book (2008, c2007.) Hunter, Erin. Call number: HUN W.C. Power.of.Three 1 3 of 3 copies available at St Peter School District Libraries	✓ Place Hold Add to basket



Other Projects



- Large Print Book Clean Up Project
- Annual Spring De-duplication Project
- More modules in Niche Academy?
- Move Cataloger Assessments to Articulate?

Thank You!

