

NC Cardinal

8th Annual Report: FY 2019-2020





Year In Review

The Cardinal Team



Courtney Brown
NC Cardinal Systems
Librarian

Benjamin Murphy
NC Cardinal Program
Manager



April Durrence
NC Cardinal Training
Specialist



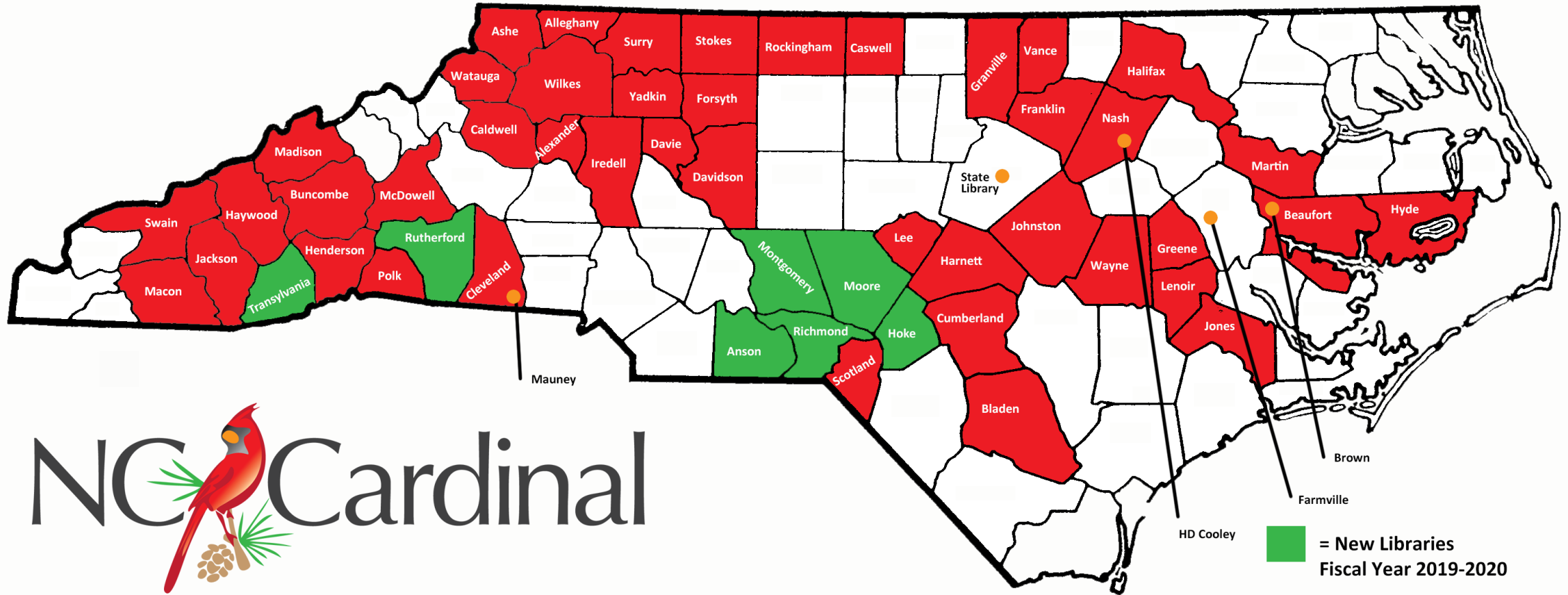
Llewellyn Marshall
NC Cardinal Application
Administrator /
Developer



Anna Pietzman
NC Cardinal Project
Manager



NC Cardinal in 2019-2020

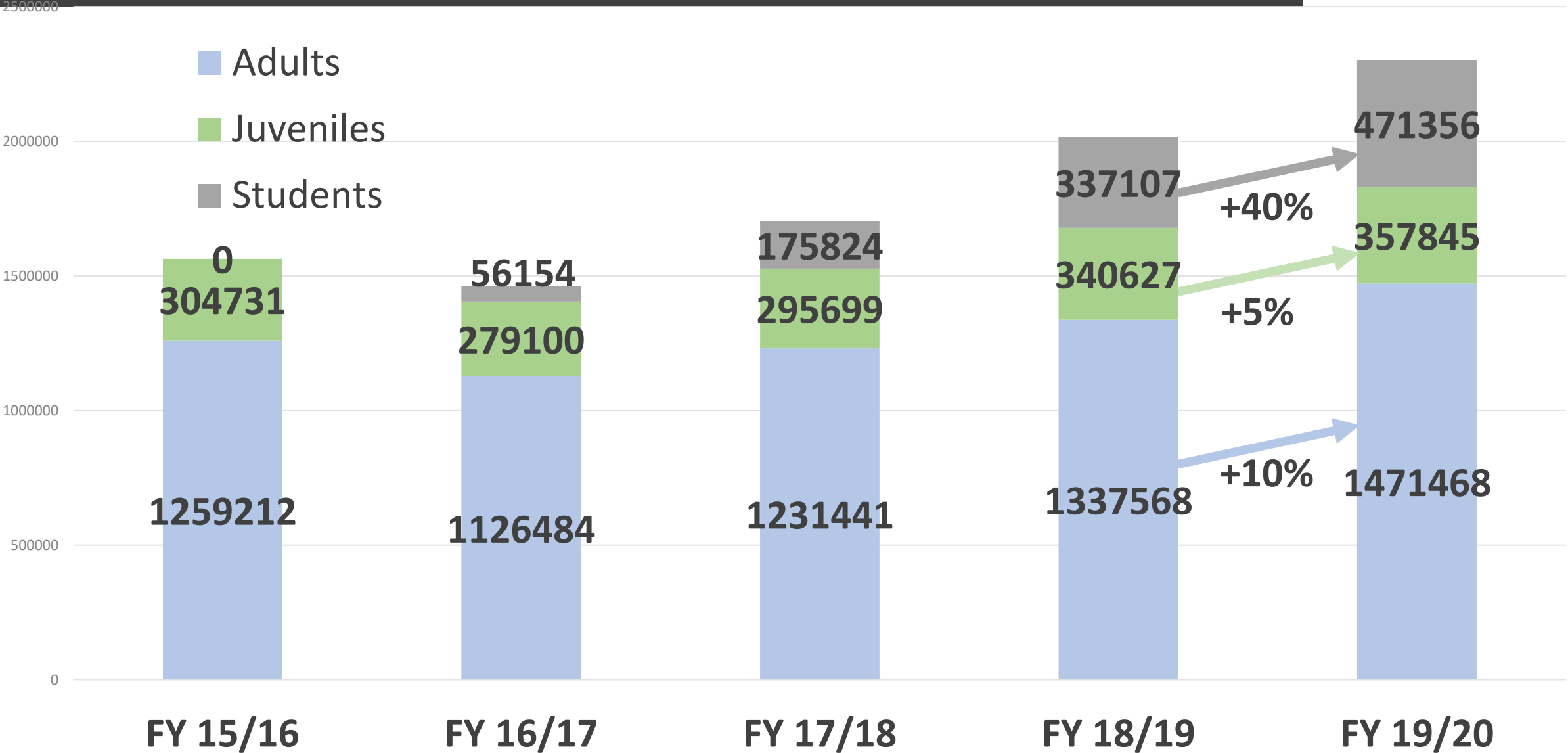


43 counties, 4 municipalities, 7 Special Libraries
164 branches

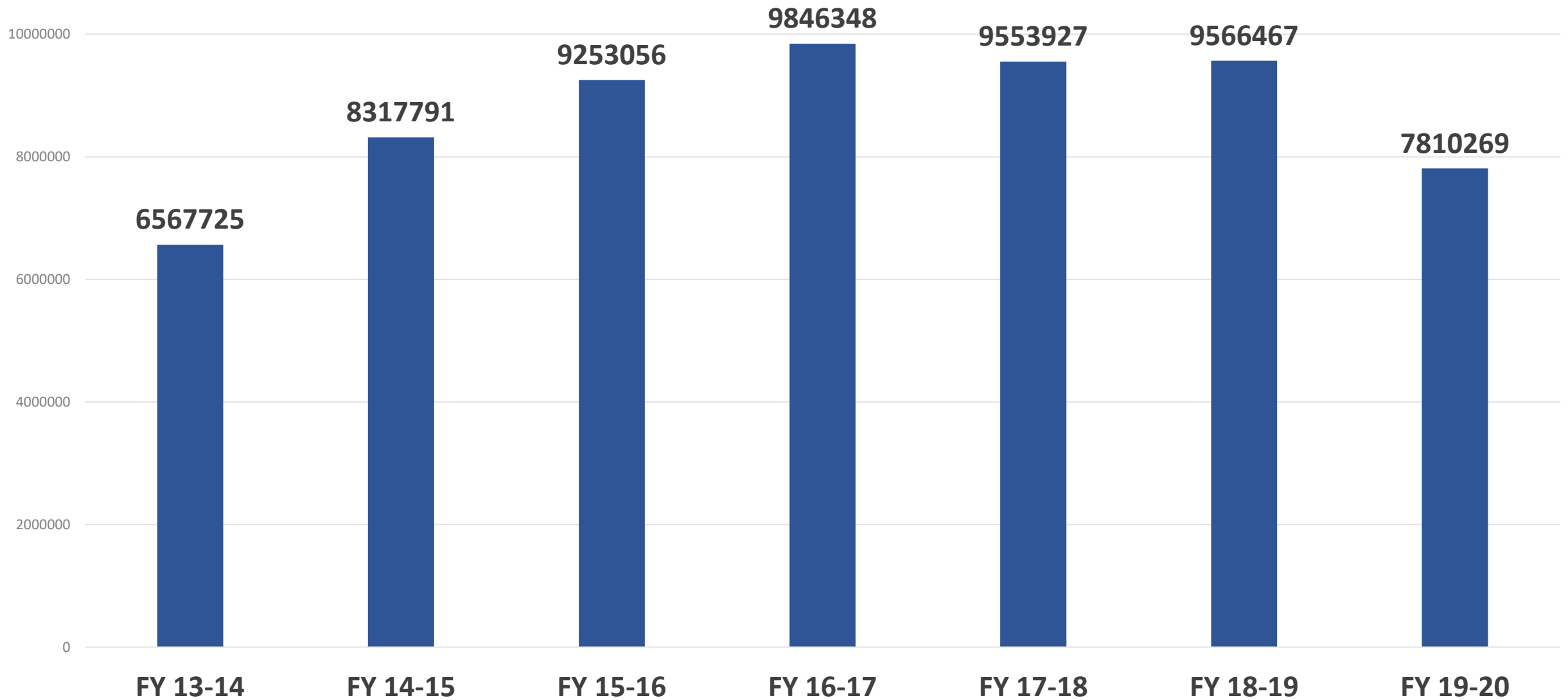


50 counties, 4 municipalities, 7 Special Libraries
183 branches

Active User Accounts



Circulations



Circulations: Impact of COVID

1000000

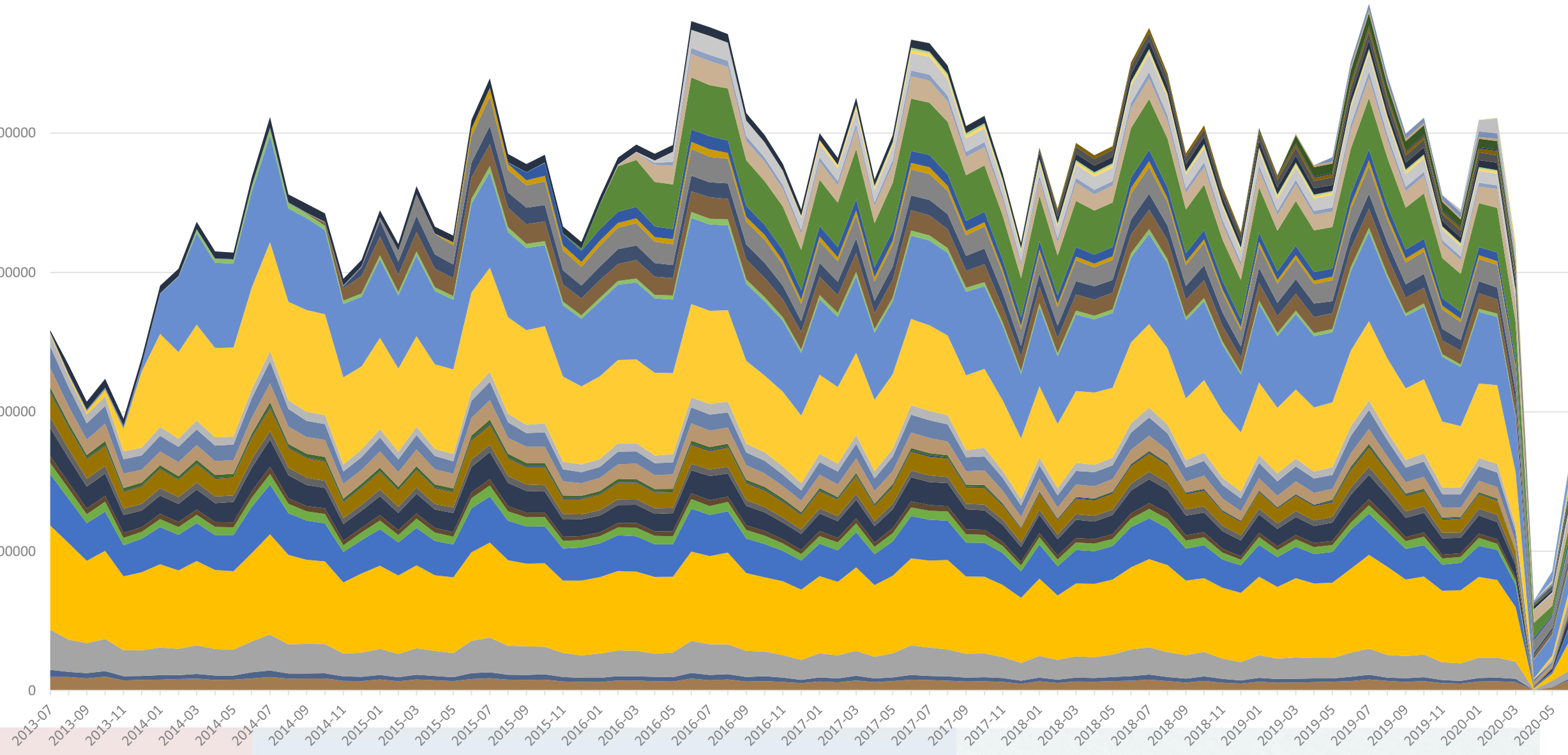
800000

600000

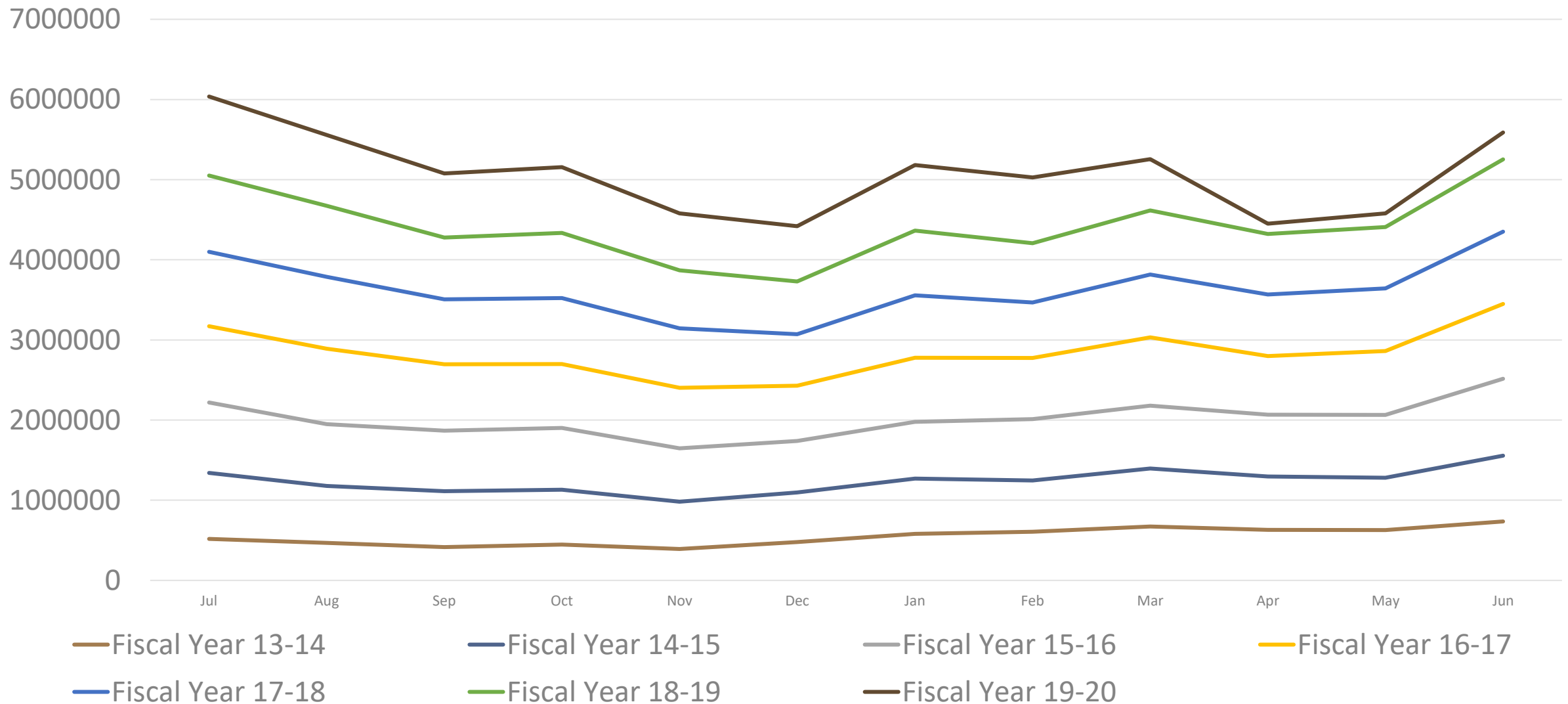
400000

200000

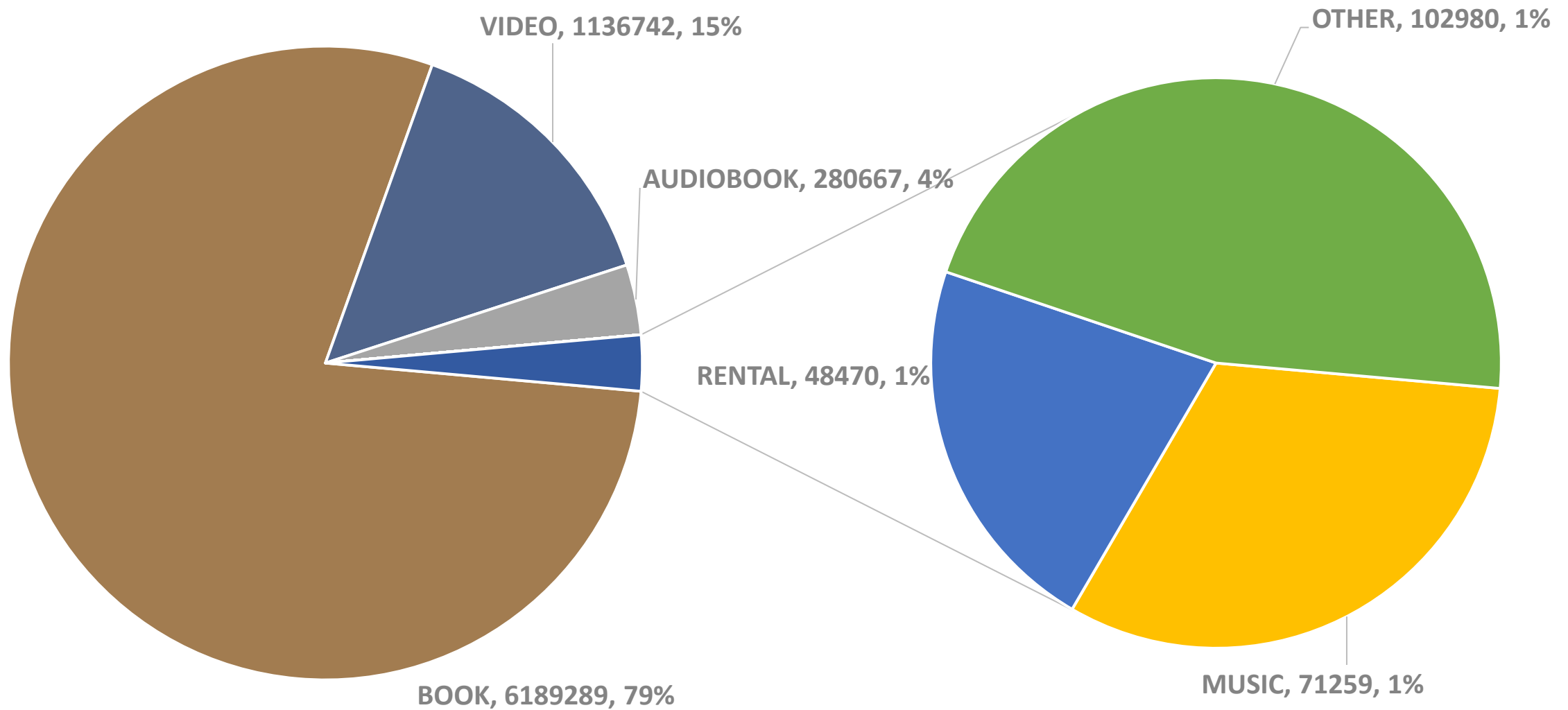
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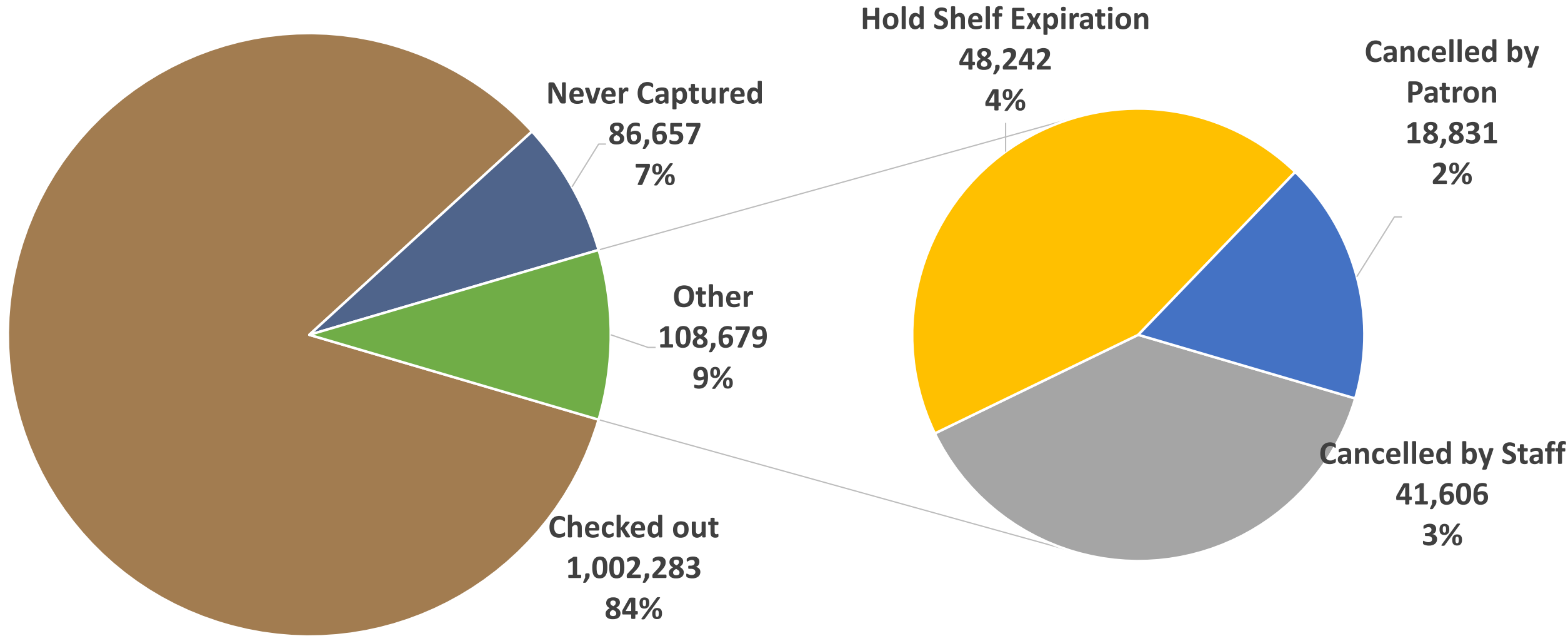
Circulations: Comparing Year to Year



Circulations By Item Type



Outcome of Hold Requests

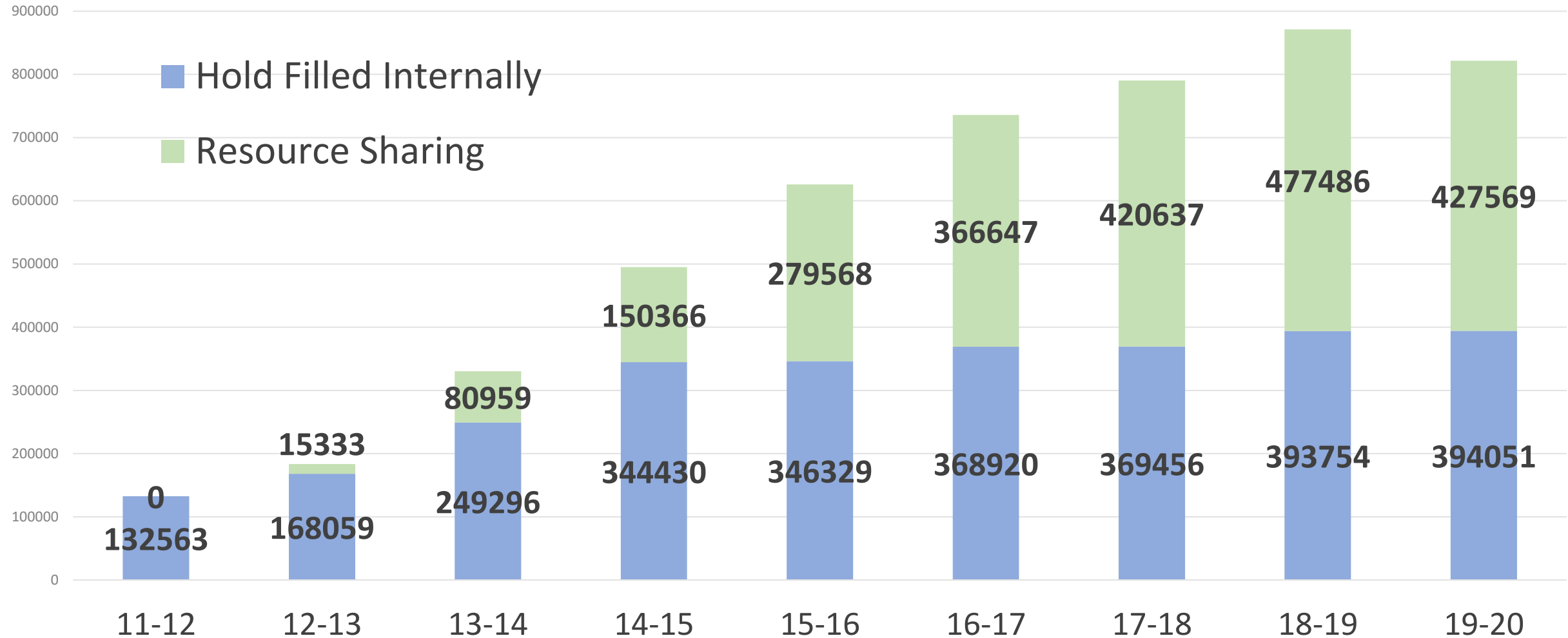


Total Hold Requests: 1,203,270

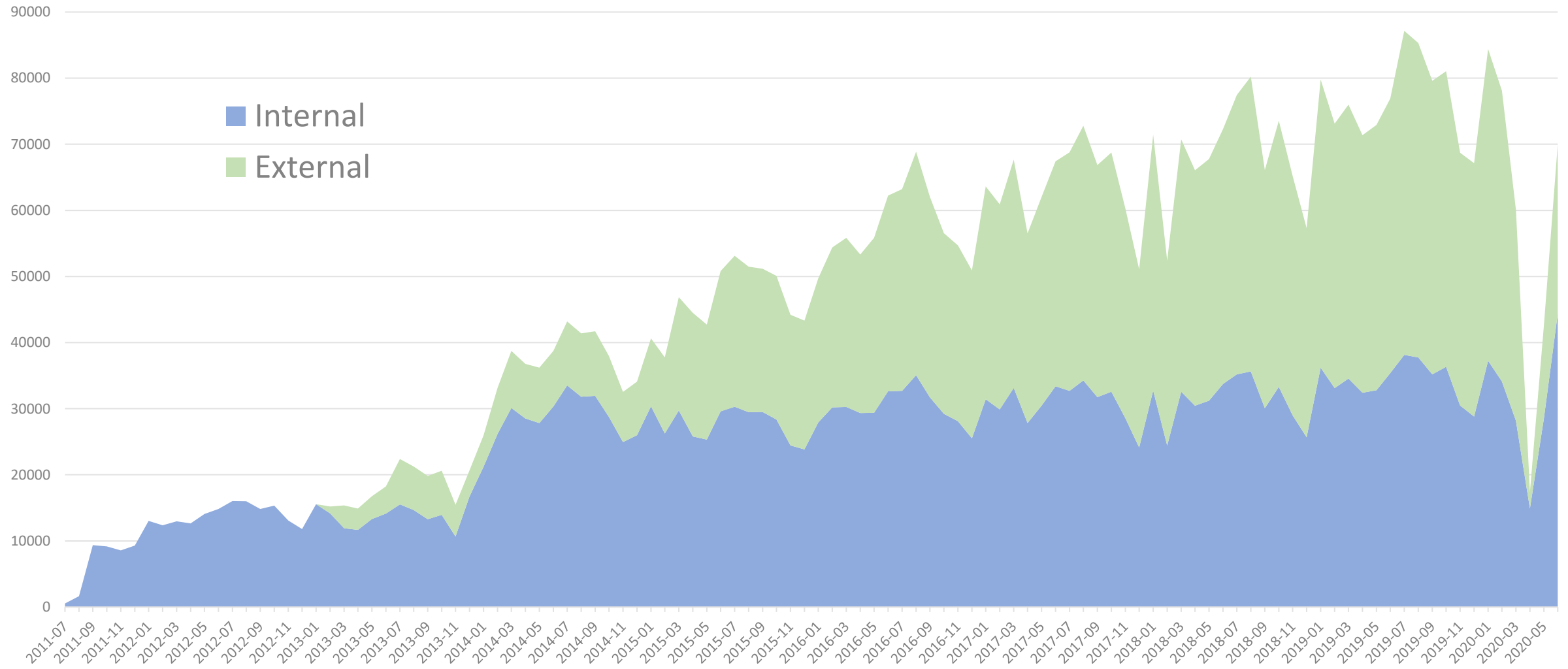


Resource Sharing

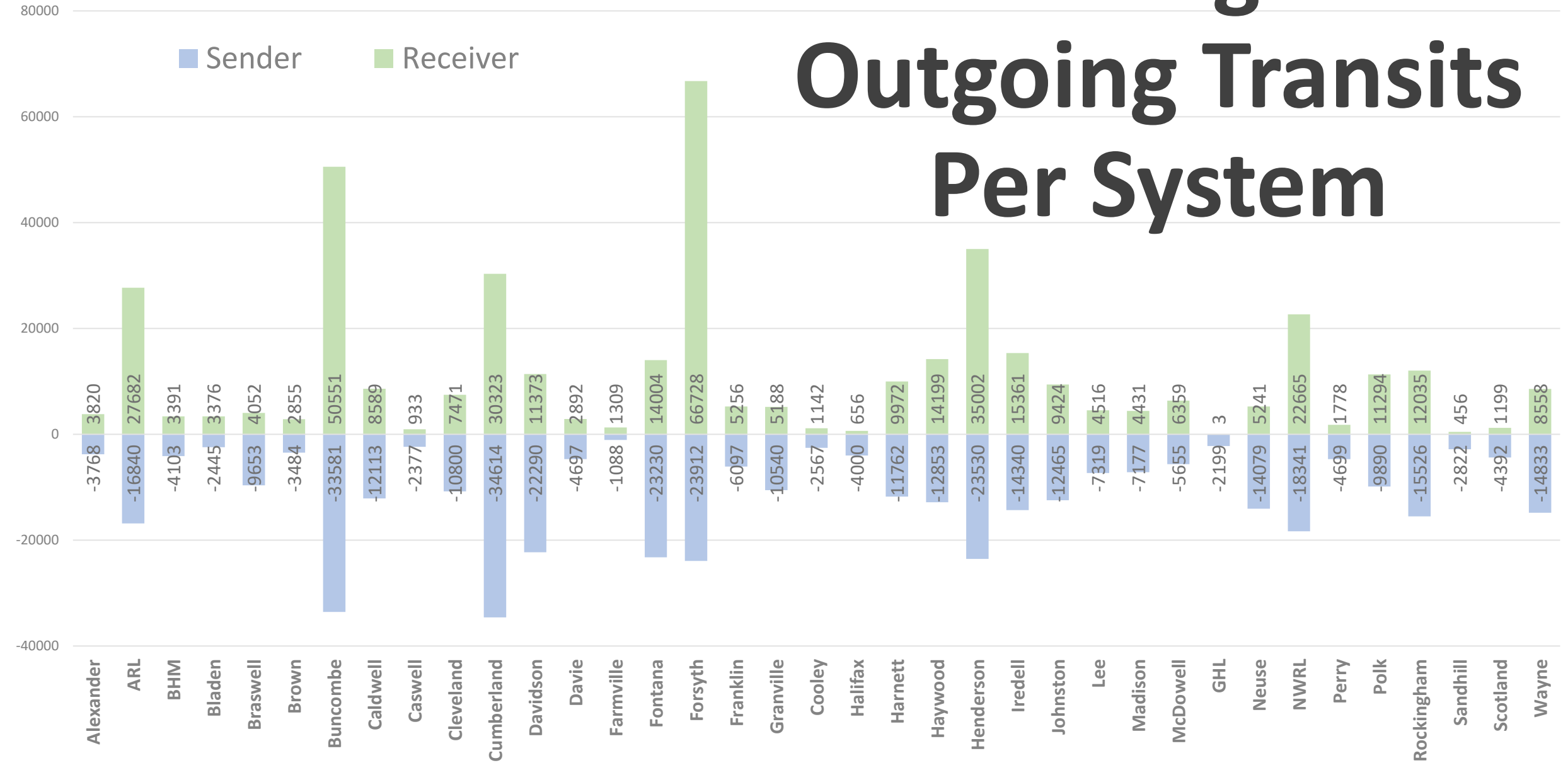
Resource Sharing: Source of Transit Holds



Resource Sharing: Source of Transit Holds



Incoming and Outgoing Transits Per System





Student Access Program

Student Access

27 Library Systems Participating
401,164 active accounts this year

Checkouts

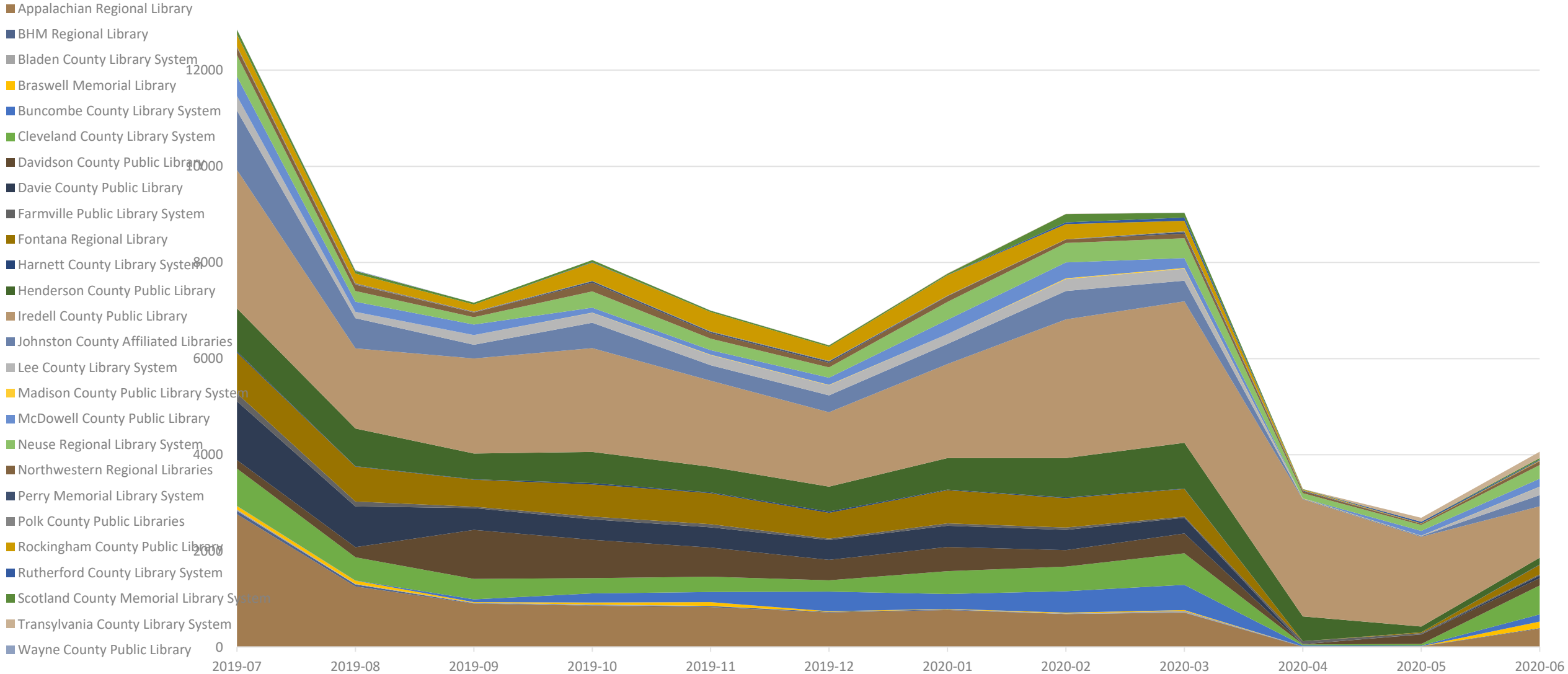
10,188 total users (3%) checked something out
85,056 total checkouts
Average 8.35 items per person

Electronic Resource Authentications

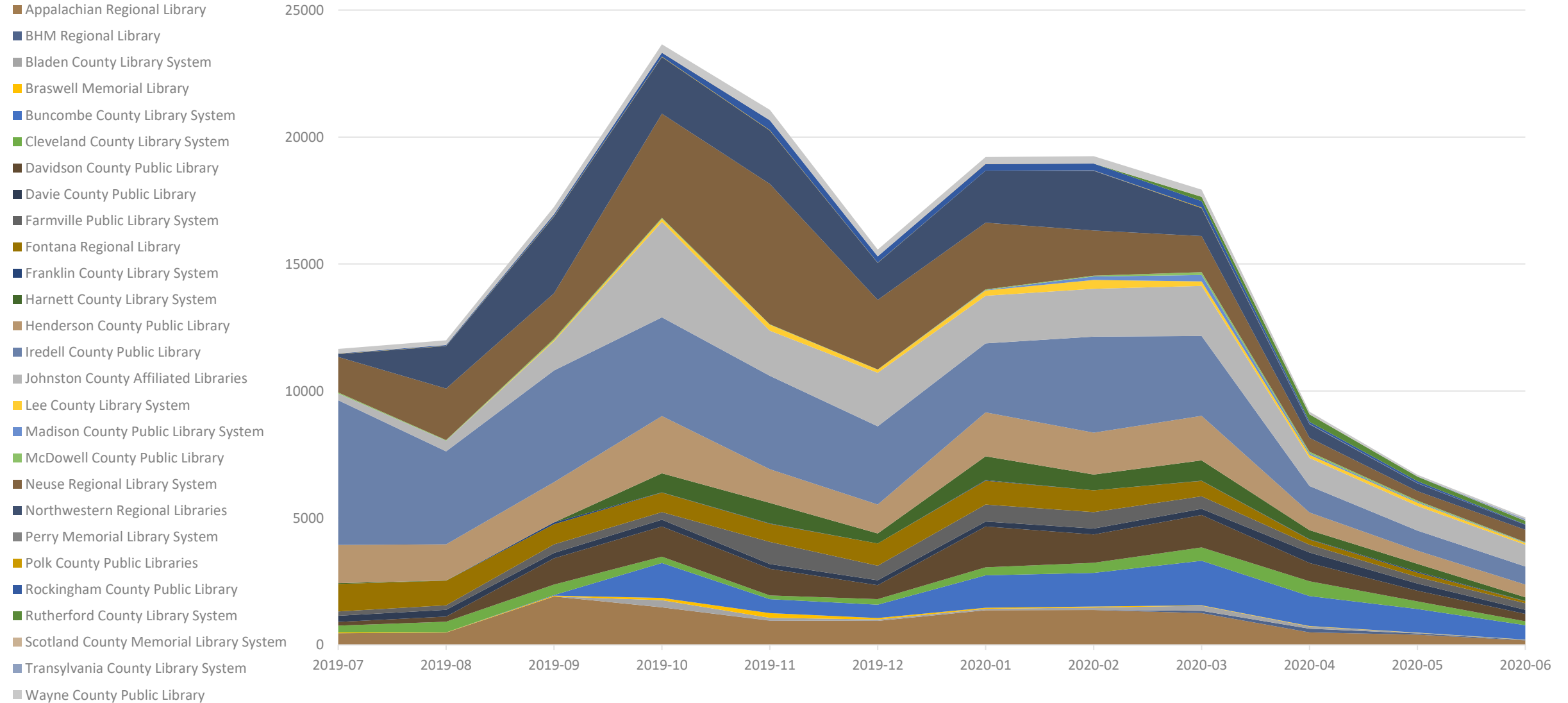
27,087 total users (7%) authenticated electronically
178,481 total authentications
Average 6.59 connections per account



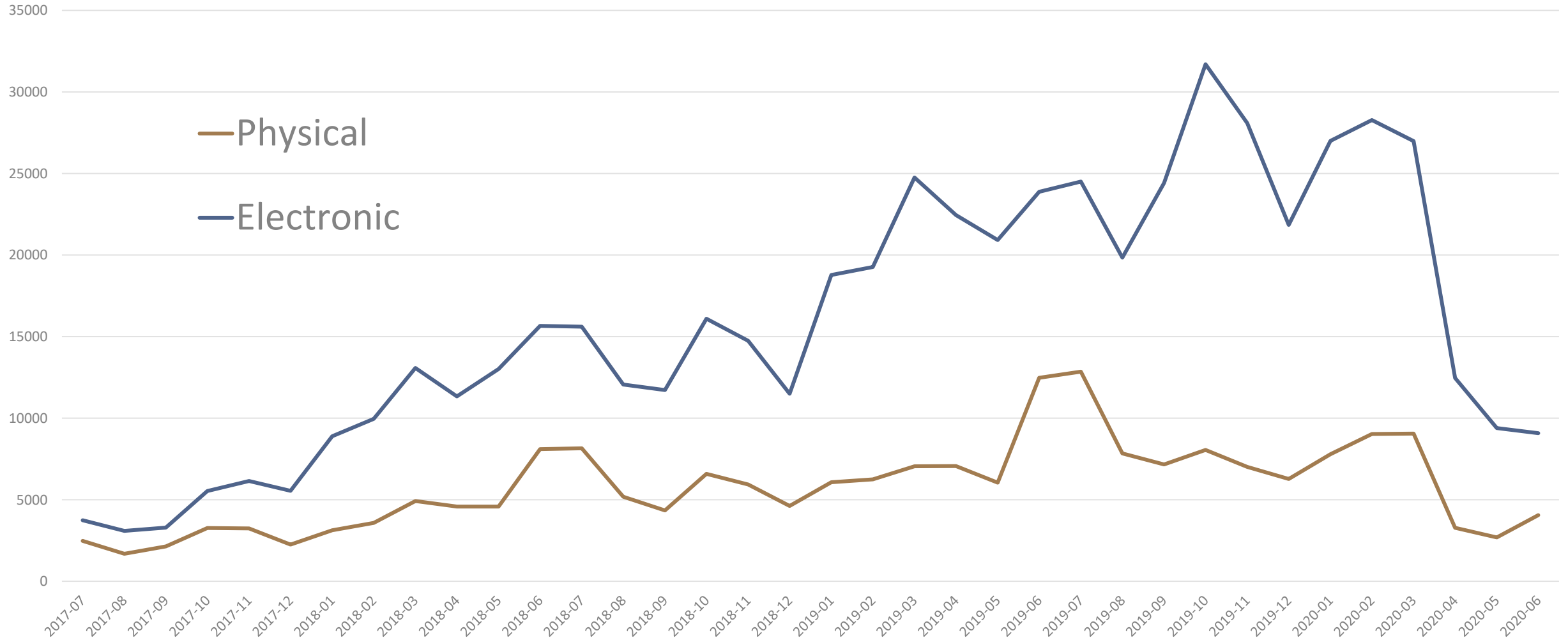
Student Access Circulations



Student Access Authentications



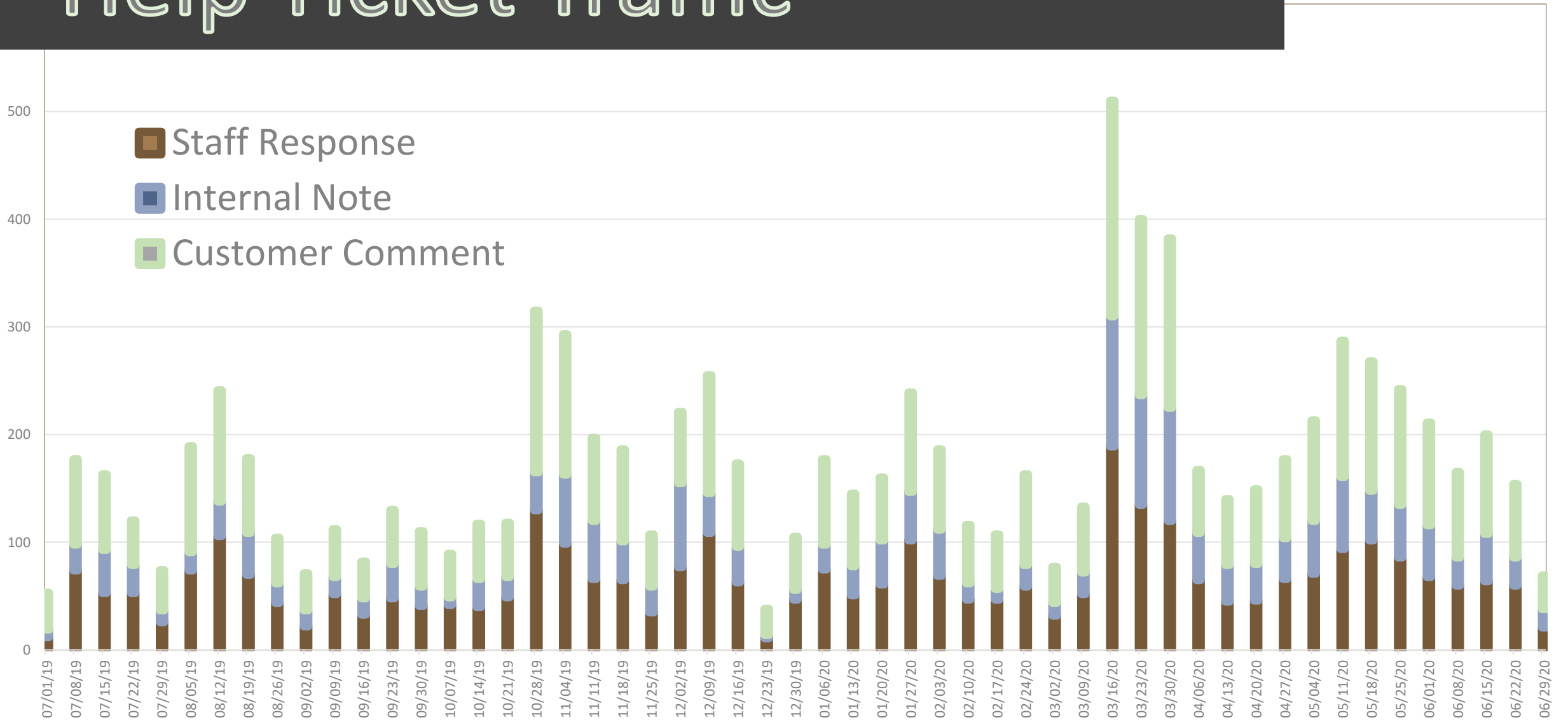
Student Access Over Time





Projects & Activities

Help Ticket Traffic



User Experience Committee

2019-2020 Accomplishments

Patron Privacy Policy

passed Governance Committee on 7/21/20

Code of Ethics Recommendation

passed Governance Committee on 5/11/20

2020-2021 Goals

Patron Purge

work begins in August 2020

OPAC Redesign

■ 2019-2020 Committee Members

- ***Meghan Blackburn*** – Cleveland
- ***Tammy Holt*** – Cumberland
- ***Teresa Patti*** – Brown Library
- ***Calvert Smith*** – Rockingham
- ***Justin Stout*** – Neuse Regional
- ***Forrest Tate*** – Henderson
- ***Amy Weber*** – Iredell
- ***Camelia Walker*** – Wayne

Authorities Processing

- Automated quarterly processing
- Any new or altered records are processed.

0 #a Martin, George R. R. #v Television adaptations.
0 #a Kings and rulers #v Drama. #0 (CARDINAL)441306
0 #a Nobility #v Drama.
0 #a Imaginary wars and battles #v Drama.
7 #a Fantasy television programs. #2 lcgft #0 (CARDINAL)692390
7 #a Action and adventure television programs. #2 lcgft #0 (CARDINAL)340284
7 #a Fiction television programs. #2 lcgft #0 (CARDINAL)340107
7 #a Television adaptations. #2 lcgft #0 (CARDINAL)340108
7 #a Television programs. #2 lcgft #0 (CARDINAL)305276
7 #a Television series. #2 lcgft #0 (CARDINAL)340104
7 #a Video recordings for the hearing impaired. #2 lcgft #0 (CARDINAL)340028
#a Benioff, David, #e creator, #e television producer, #e screenwriter. #0 (C
#a Weiss, D. B. #e creator, #e television producer, #e screenwriter.
#a Martin, George R. R. #e television producer, #e screenwriter. #0 (CARDI
#a Gerardis, Vince, #e television producer.
#a Vicinanza, Ralph, #d 1950-2010, #e television producer.
#a Casady, Guymon, #e television producer. #0 (CARDINAL)340049
#a Strauss, Carolyn, #e television producer.
#a Huffam, Mark, #e television producer.
#a Burn, Joanna, #e television producer.
#a Doelger, Frank, #e television producer.
#a Cogman, Bryan. #e screenwriter. #0 (CARDINAL)399243
#a Espenson, Jane. #e screenwriter. #0 (CARDINAL)422541

Support Site Redesign



NC Cardinal Support and Staff Education

- Home
- Submit a Request
- Check on a Request
- Knowledge Books
 - Cataloging Best Practices
 - Reports in Evergreen
 - Circulation in Evergreen 3.1
 - Upgrade to Evergreen 3.1
 - Summon Documentation
 - Troubleshooting Evergreen 3.1
 - Resource Sharing Best Practice Standards
 - Student Access Initiative
 - Administration Manual for Libraries

Welcome to the NC Cardinal Support Center. If you are a staff member at a NC Cardinal Member Library you may submit a help ticket via this portal.

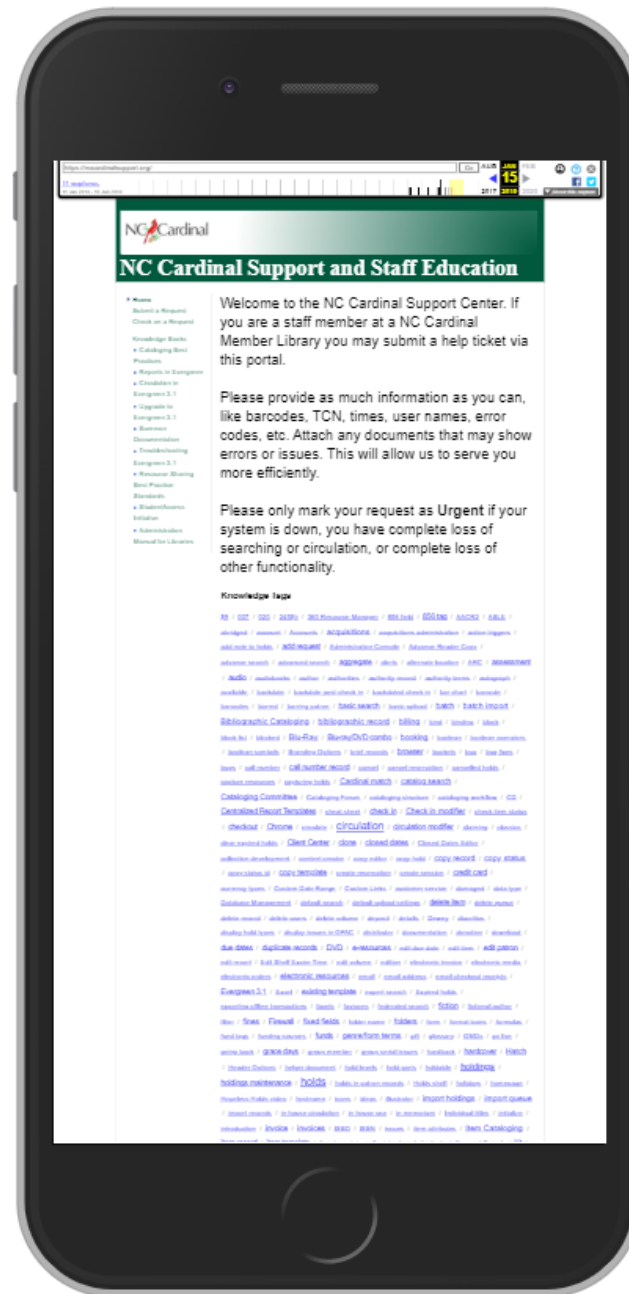
Please provide as much information as you can, like barcodes, TCN, times, user names, error codes, etc. Attach any documents that may show errors or issues. This will allow us to serve you more efficiently.

Please only mark your request as Urgent if your system is down, you have complete loss of searching or circulation, or complete loss of other functionality.

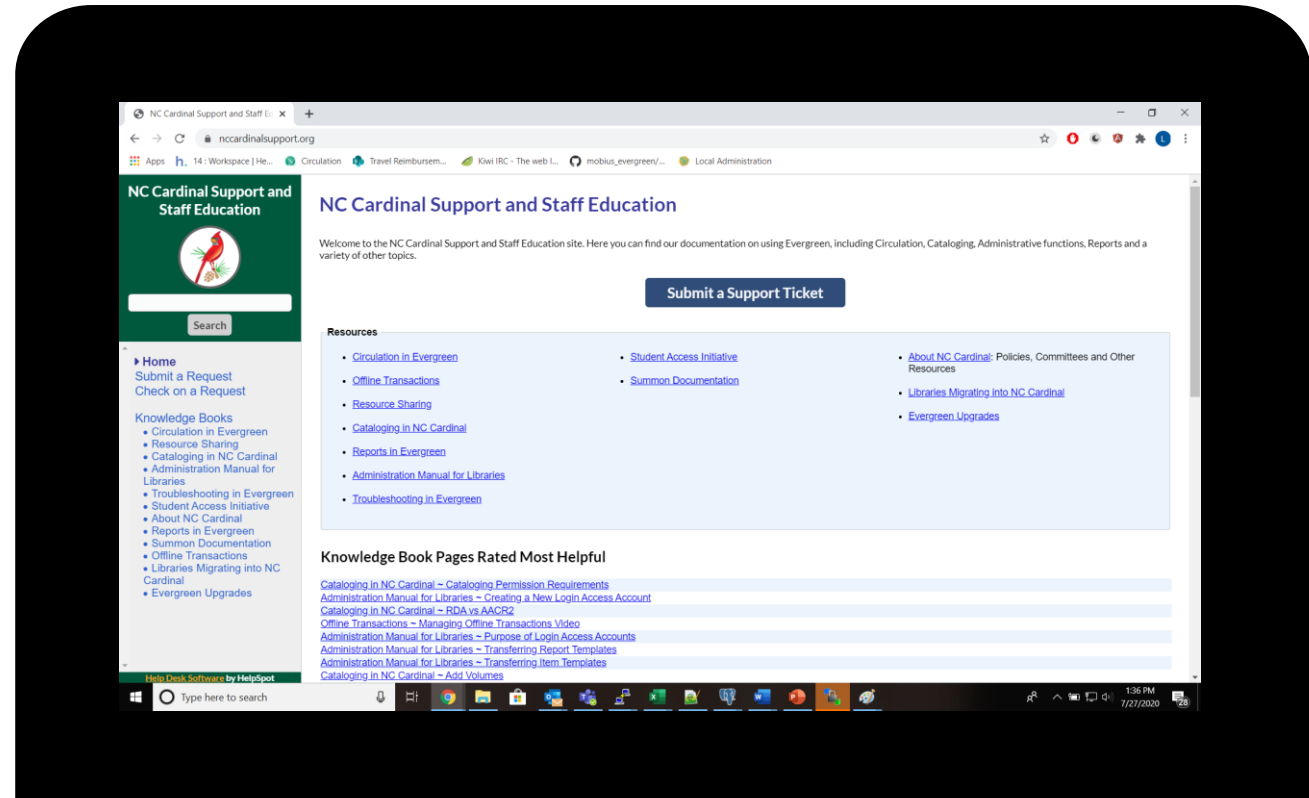
Knowledge Tags

[50](#) / [007](#) / [020](#) / [2455h](#) / [360.Resource Manager](#) / [856.field](#) / [856.tag](#) / [AACR2](#) / [ABLE](#) / [abridged](#) / [account](#) / [Accounts](#) / [ACQUISITIONS](#) / [acquisitions.administration](#) / [action.triggers](#) / [add.note.to.holds](#) / [add.request](#) / [Administration Console](#) / [Advance Reader Copy](#) / [advance.search](#) / [advanced.search](#) / [appropriate](#) / [alerts](#) / [alternate.location](#) / [ARC](#) / [assessment](#) / [audio](#) / [audiobooks](#) / [author](#) / [authorities](#) / [authority.record](#) / [authority.terms](#) / [autograph](#) / [available](#) / [backdate](#) / [backdate.post.check.in](#) / [backdated.check.in](#) / [bar.chart](#) / [barcode](#) / [barcodes](#) / [barred](#) / [barring.patron](#) / [basic.search](#) / [basic.upload](#) / [batch](#) / [batch.import](#) / [Bibliographic.Cataloging](#) / [bibliographic.record](#) / [billing](#) / [bind](#) / [binding](#) / [block](#) / [block.list](#) / [blocked](#) / [Blu-Ray](#) / [Blu-ray/DVD.combo](#) / [booking](#) / [boolean](#) / [boolean.operators](#) / [boolean.symbols](#) / [Branding.Options](#) / [brief.records](#) / [browser](#) / [buckets](#) / [bug](#) / [bug.fixes](#) / [bugs](#) / [call.number](#) / [call.number.record](#) / [cancel](#) / [cancel.reservation](#) / [cancelled.holds](#) / [capture.resources](#) / [caching.holds](#) / [Cardinal.match](#) / [catalog.search](#) / [Cataloging.Committee](#) / [Cataloging.Forum](#) / [cataloging.structure](#) / [cataloging.workflow](#) / [CQ](#) / [Centralized.Report.Templates](#) / [cheat.sheet](#) / [check.in](#) / [Check.in.modifier](#) / [check.item.status](#) / [checkout](#) / [Chrome](#) / [circulate](#) / [circulation](#) / [circulation.modifier](#) / [claiming](#) / [classics](#) / [clear.expired.holds](#) / [Client.Center](#) / [clone](#) / [closed.dates](#) / [Closed.Dates.Editor](#) / [collection.development](#) / [content.creator](#) / [copy.editor](#) / [copy.hold](#) / [copy.record](#) / [copy.status](#) /

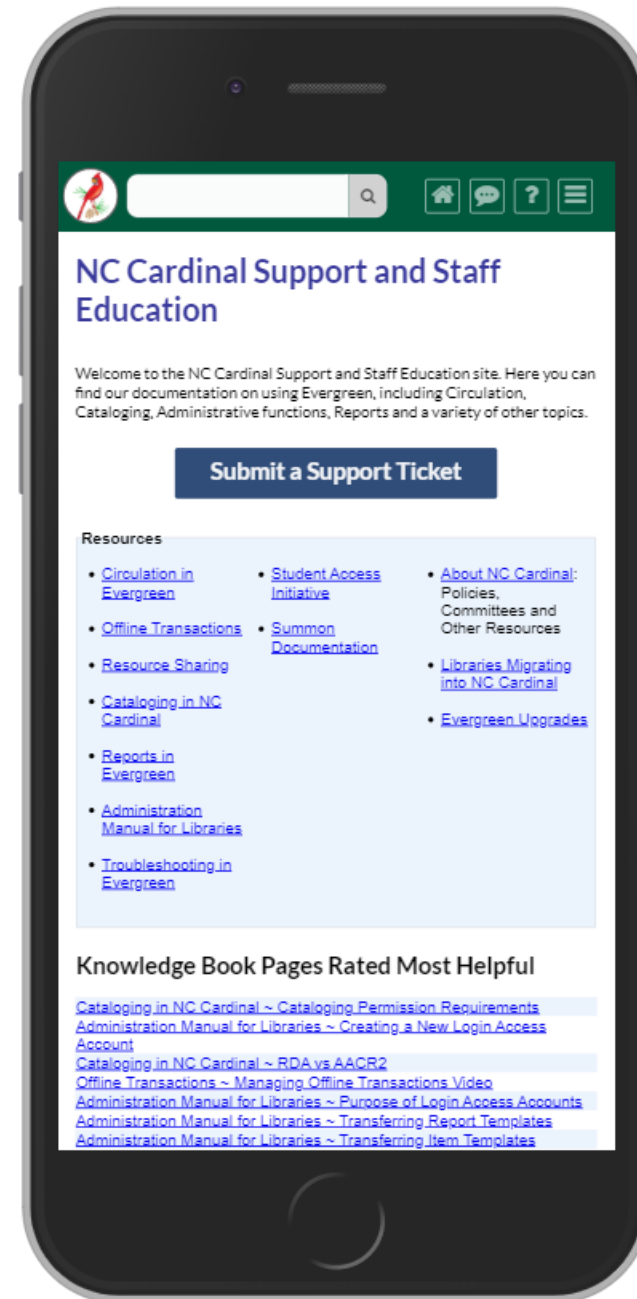
Support Site Redesign



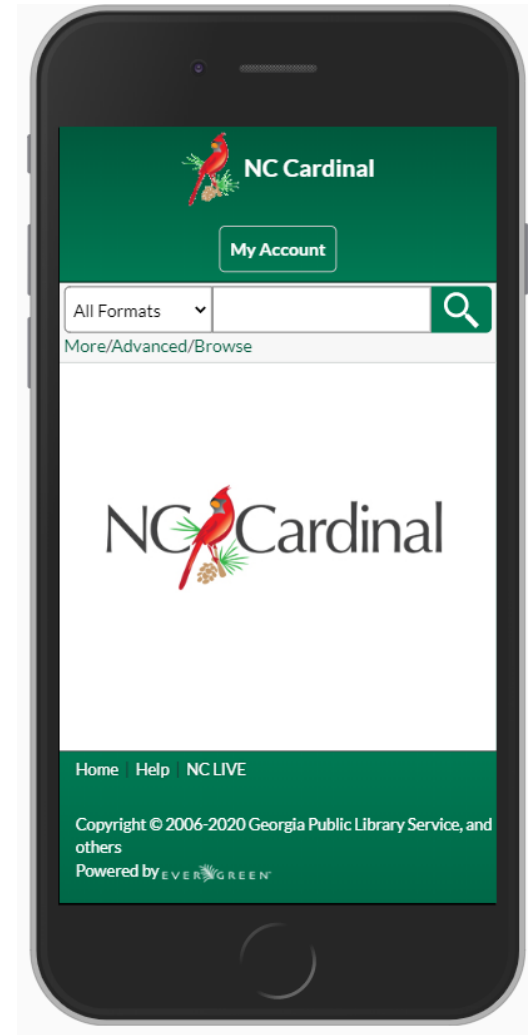
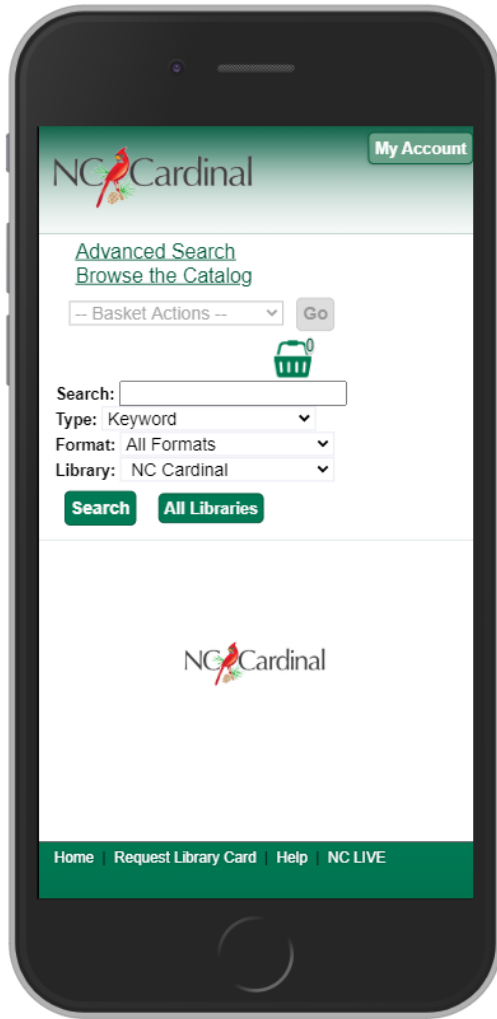
Support Site Redesign



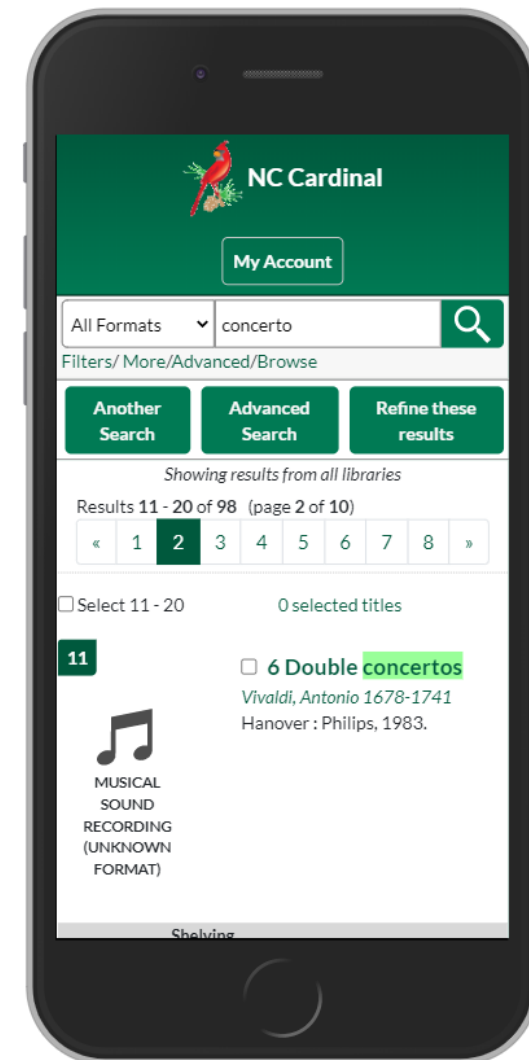
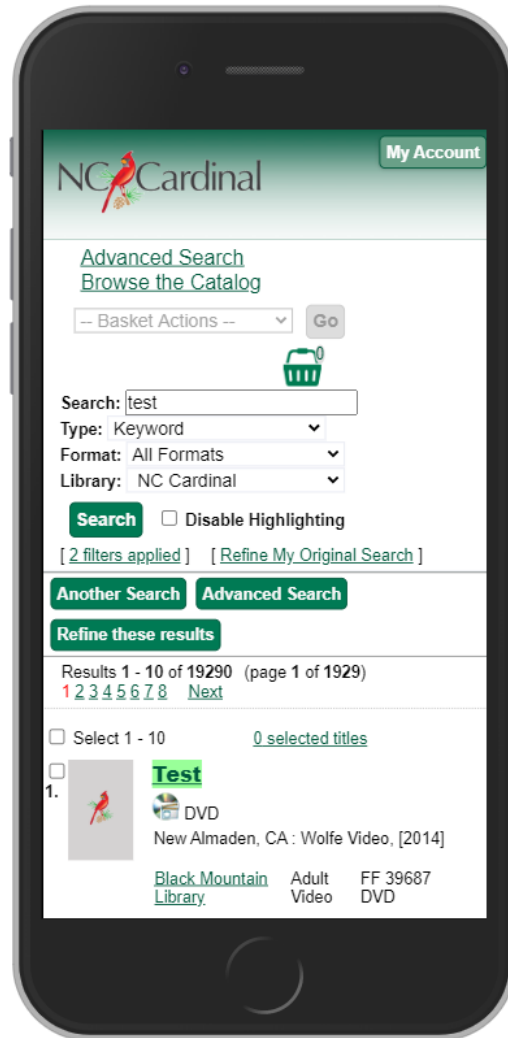
Support Site Redesign



Future OPAC Enhancements



Future OPAC Enhancements



Staff Permissions Project

- Create efficient inheritance structure [assign permissions thoughtfully and only once]
- SLAMs for each library system to manage staff login accounts [ensure appropriate staff access to patron data and improve data security & integrity]
- Consolidate cataloging & acquisitions permissions into Item Cat and Bib Cat [represents job activities, rather than modules]
- Individual login access accounts for cataloging and admin users [staff accountability]

Staff Permissions Project

[Home](#) [Pings](#) [Hey!](#) [Activity](#) [My Stuff](#) [Find](#)

System Login Access Managers Staff Permissions Project

AH AL BV BL BC CS CR DM DW DR EE FD JM JAO JC JF JS KN Add/remove people

The client

Campfire



Chat casually with the group, ask random questions, and share stuff without ceremony.

Message Board



Acquisitions permissions 6
Has there been any progress



FT Copy needed for hold
In the call yesterday we



Summary and recording from 7/2 call



Item Cat videos
Hi everyone. I wanted to let



DM Production Permissions 3
Cardinal Staff, I've had 2

To-dos



Make lists of work that needs to get done, assign items, set due dates, and discuss.

Schedule



Set important dates on a shared schedule. Subscribe to events in Google Cal, iCal, or Outlook.

Automatic Check-ins



Create recurring questions so you don't have to pester your team about what's going on.

Docs & Files



Updated with latest cataloging assessment results.

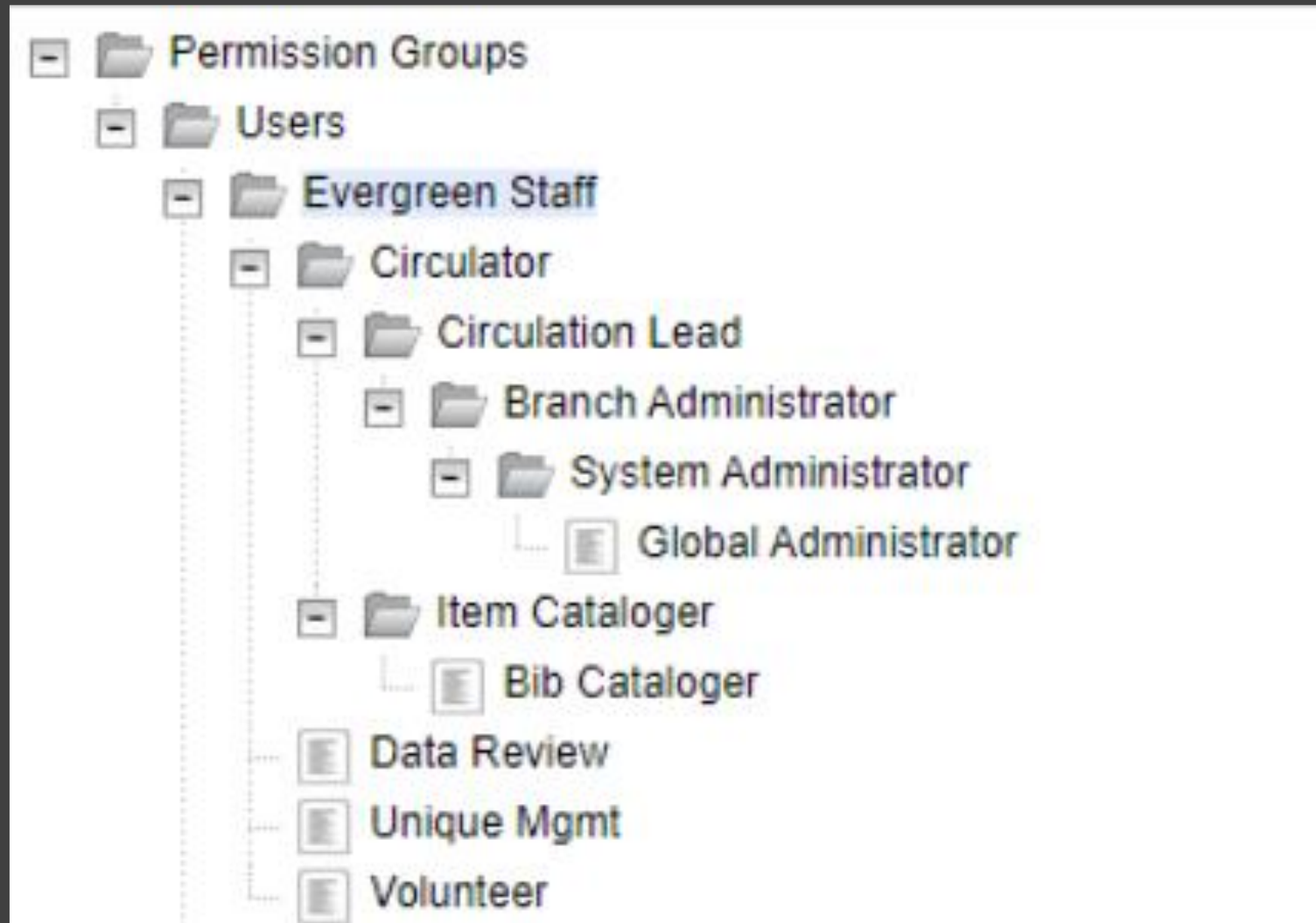
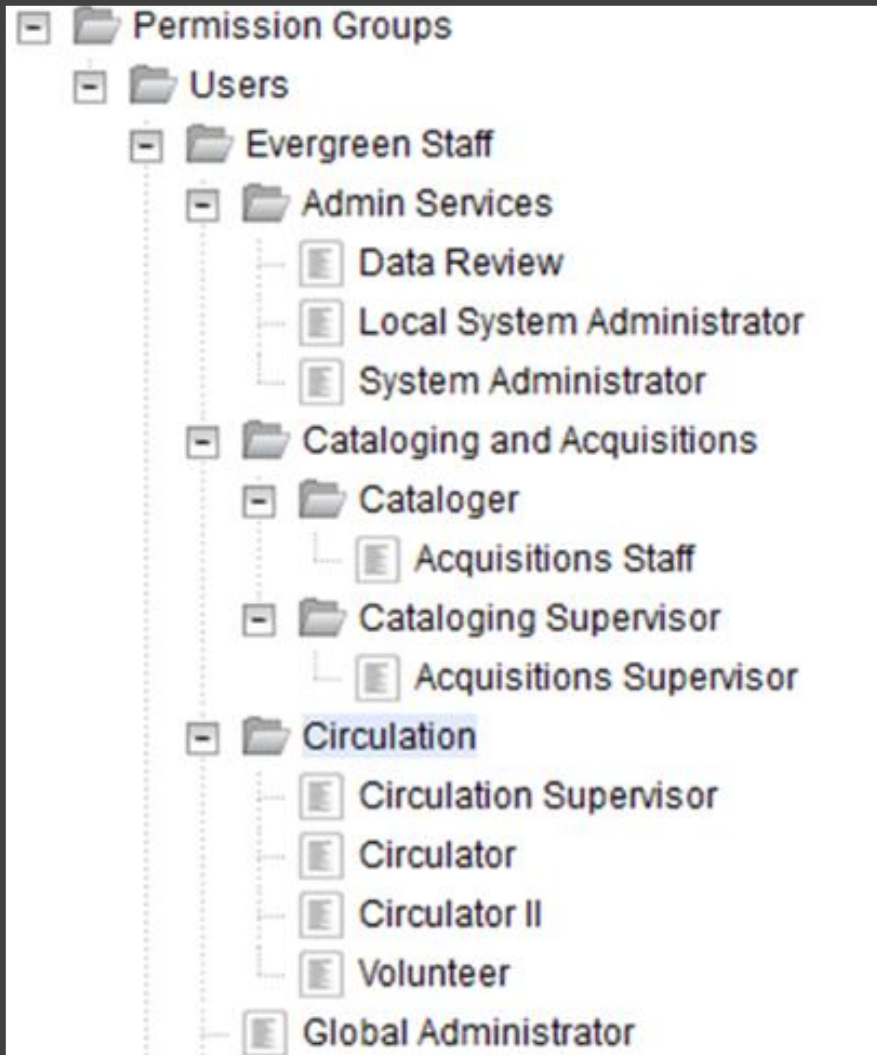


Staff permissions on dev as of noon 6/18/2019



- SLAMs for each library system manage staff login accounts
- Improved accountability and appropriate access to patron data
- Review and document where permissions should be assigned
- Ongoing dialog during and after the project

Staff Permissions Project



Staff Permissions Project

Playlist with our presentation for [2020 Evergreen Conference](#) on NC Cardinal channel.

The screenshot shows a YouTube interface. On the left is a sidebar with navigation links: Home, Trending, Subscriptions, Library, History, Your videos, Watch later, Circulation - Evergree..., and Show more. Below this is a 'SUBSCRIPTIONS' section listing 'Evergreen Library Sys...', 'BC Libraries Coopera...', and 'Sage Library System'. The main content area features a video player with a thumbnail showing wooden blocks spelling 'TIME FOR CHANGE'. Below the player is the title '2020 Evergreen Online Conference - Evergreen Community', a description 'Presentations recorded during the first online Evergreen conference', and the channel name 'NC Cardinal'. To the right of the main video is a 'SORT BY' dropdown and a list of five videos from the 'Evergreen Library System' playlist:

- Rethinking Patron and Staff Permission Groups in NC Cardinal** (52:36)
- Intro and Keynote for Evergreen International 2020 Online Conference** (1:04:52)
- Consortium Leaders Roundtable** (52:25)
- Self Check Roundtable** (56:55)
- Making Perl Work For You in Evergreen** (52:31)

Catalog Cleanup



Empty Bib Record Deletion



Add Format Icons



Book Deduplication



Monograph Parts Consolidation



Title Search Refinement

Cataloging Committee: Members

- Angie Bates – Perry
- Jessica Efron – NC Govt
- Heidi Flythe – Braswell
- Jonathan Furr – Davidson/Forsyth
- Emily Gibbons – Caldwell
- Wanangwa Hartwell - Polk
- Jessica Philyaw - Fontana
- Will Szwagiel – Wayne

Cataloging Roundtables

Eastern: 9.23.19

Led by Angie
Bates, Jessica
Efron, Heidi
Flythe, and
Will Szwagiel
21 attendees

Central: 9.27.19

Led by Jonathan
Furr and Emily
Gibbons
20 attendees

Western: 10.1.19

Led by
Wanangwa
Hartwell and
Jessica Philyaw
15 attendees

Staff Education and Training

Cataloging in the 3.3 Web Staff Client webinar (32 attendees)

Video posted Oct 2019 (256 views)

Offline Transactions in Web Client

Video posted Oct 2019 (147 views)

Playlist: 9 Bib Cat Assessment videos

Videos posted Jan 2020 (732 views)

Online sessions for:
Staff Permissions Project
Catalog Cleanup Projects
Sandhill Reports training
Rutherford Reports training
Transylvania Migration training
Transylvania Reports training
Carteret Migration training

Migration Training Changes

Once finalized,
training modules
will be available
to all library
systems for staff
training

Before Covid-19:

- Testing Google Classroom
- Niche Academy
- In-person training

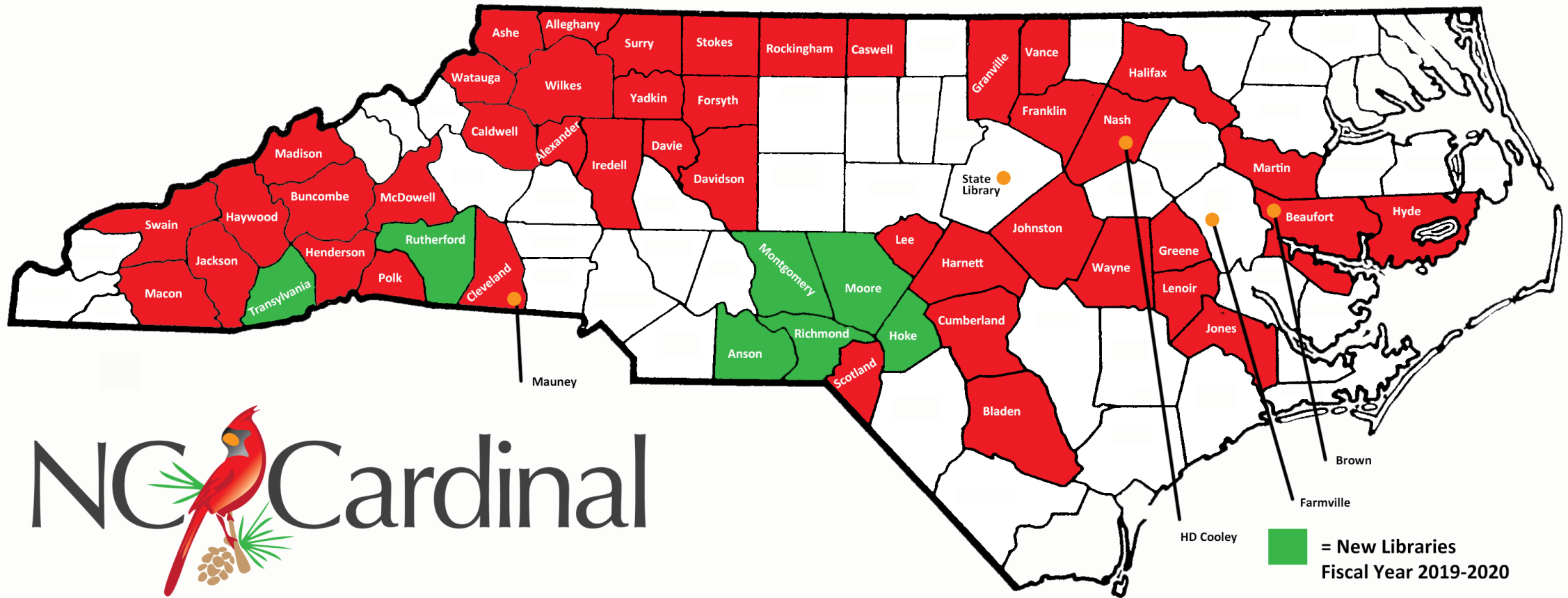
After Covid-19:

- New online training modules
- Online training sessions for circulation and cataloging



Library Migrations

Library Migrations in 19-20



43 counties, 4 municipalities, 7 Special Libraries
164 branches (Out of 407 total)



50 counties, 4 municipalities, 7 Special Libraries
183 branches



Sandhill Regional Library System

Rutherford County Public Libraries

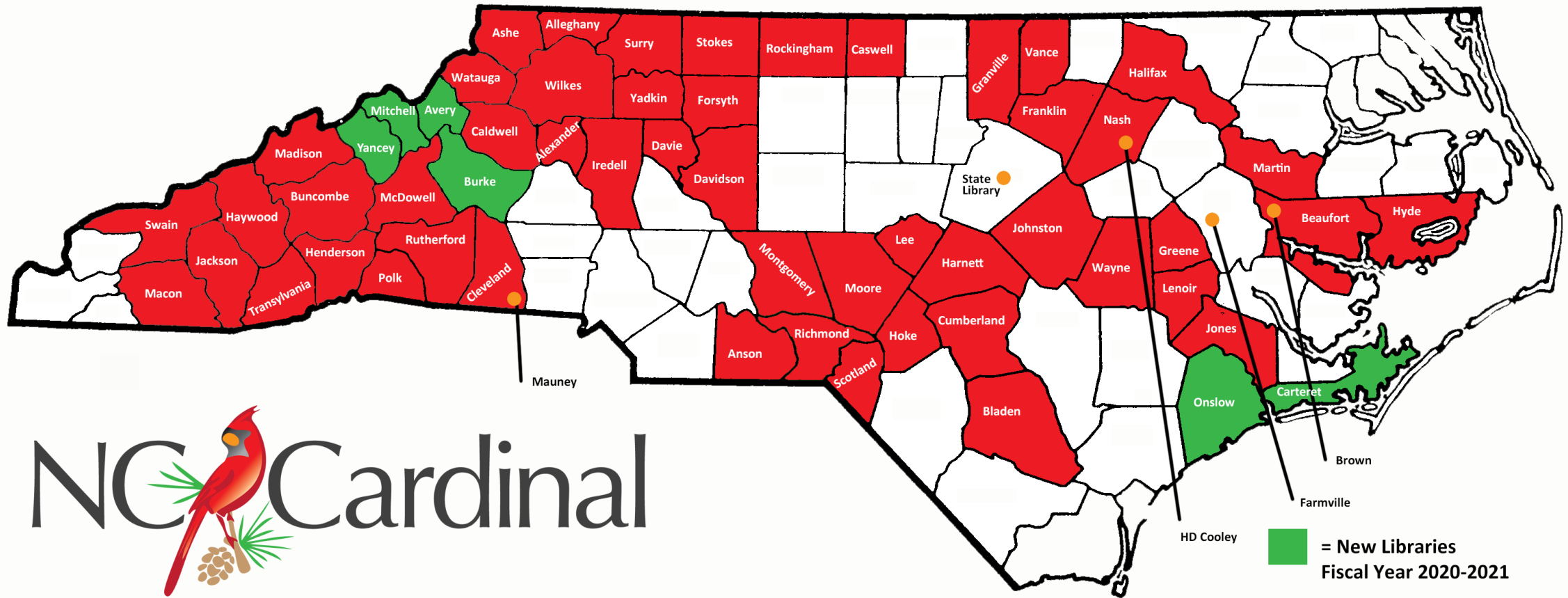
Rutherford County Library
Mountains Branch Library
Haynes Branch Library



Transylvania County --- Public Library



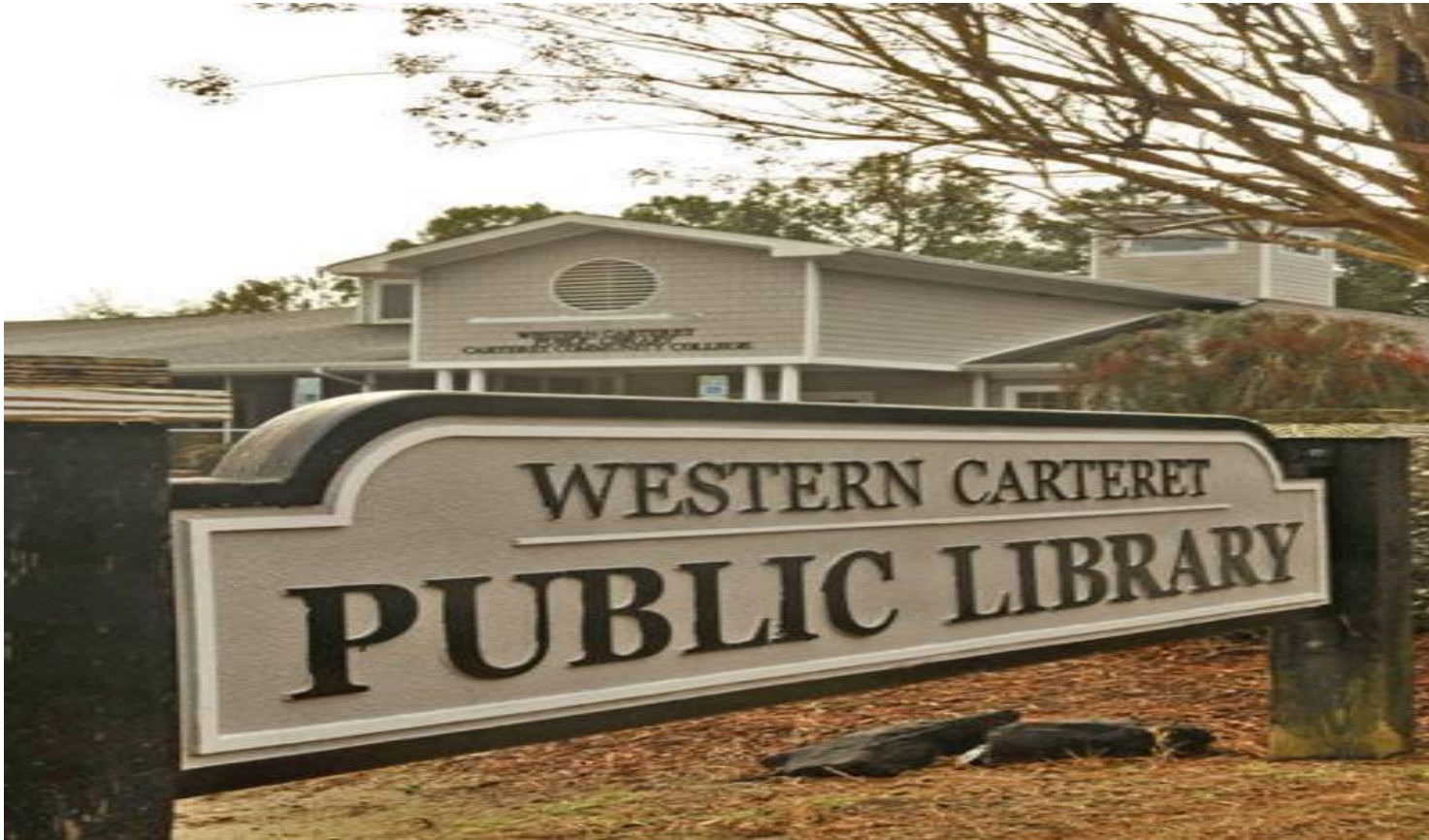
Library Migrations in 20-21



50 counties, 4 municipalities, 7 Special Libraries
183 branches



56 counties, 4 municipalities, 7 Special Libraries
199 branches



Carteret County Public Library System

Beaufort Main
Western Carteret
Down East
Bogue Bank
Newport





Onslow County Public Library

Main Branch/ Jacksonville
Richlands Branch Library
Snead Ferry Branch Library
Swansboro Branch Library



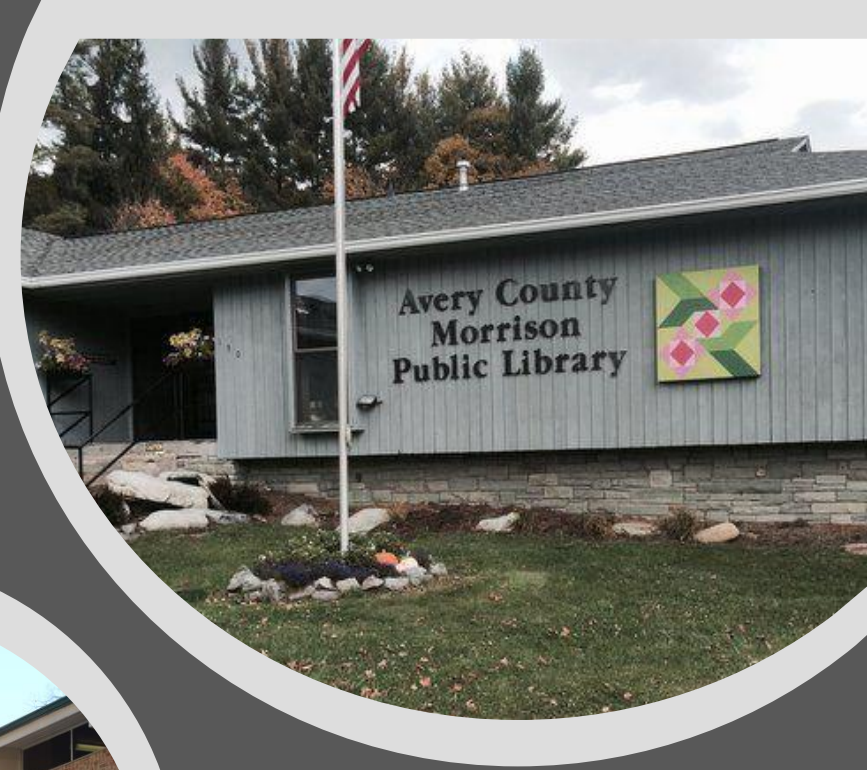
Avery- Mitchell- Yancy Regional Library System (AMY)

Avery County Morrison Public
Library

Mitchell County Public Library

Spruce Pine Public Library

Yancey County Public Library





Burke County Public Library



Morganton Public Library
Valdeese Public Library
C.B. Hildebrand Public
Library

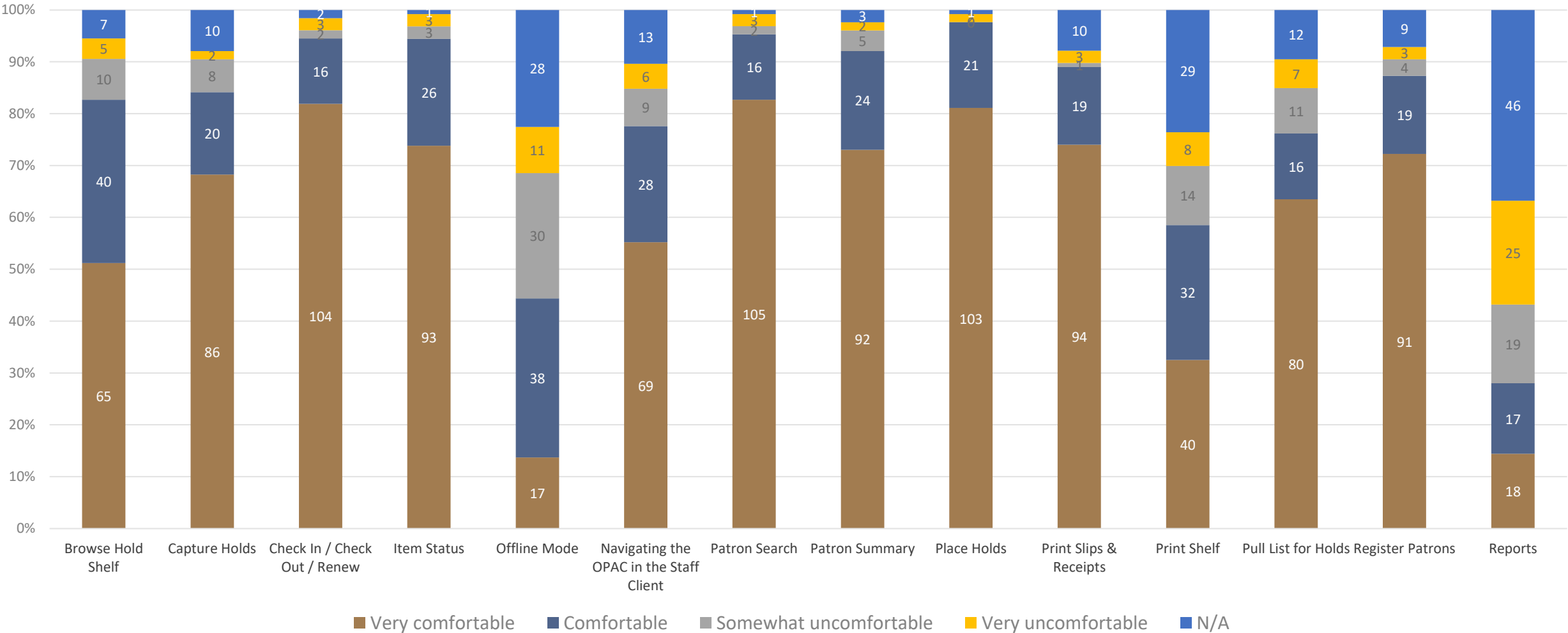




Annual Staff Survey

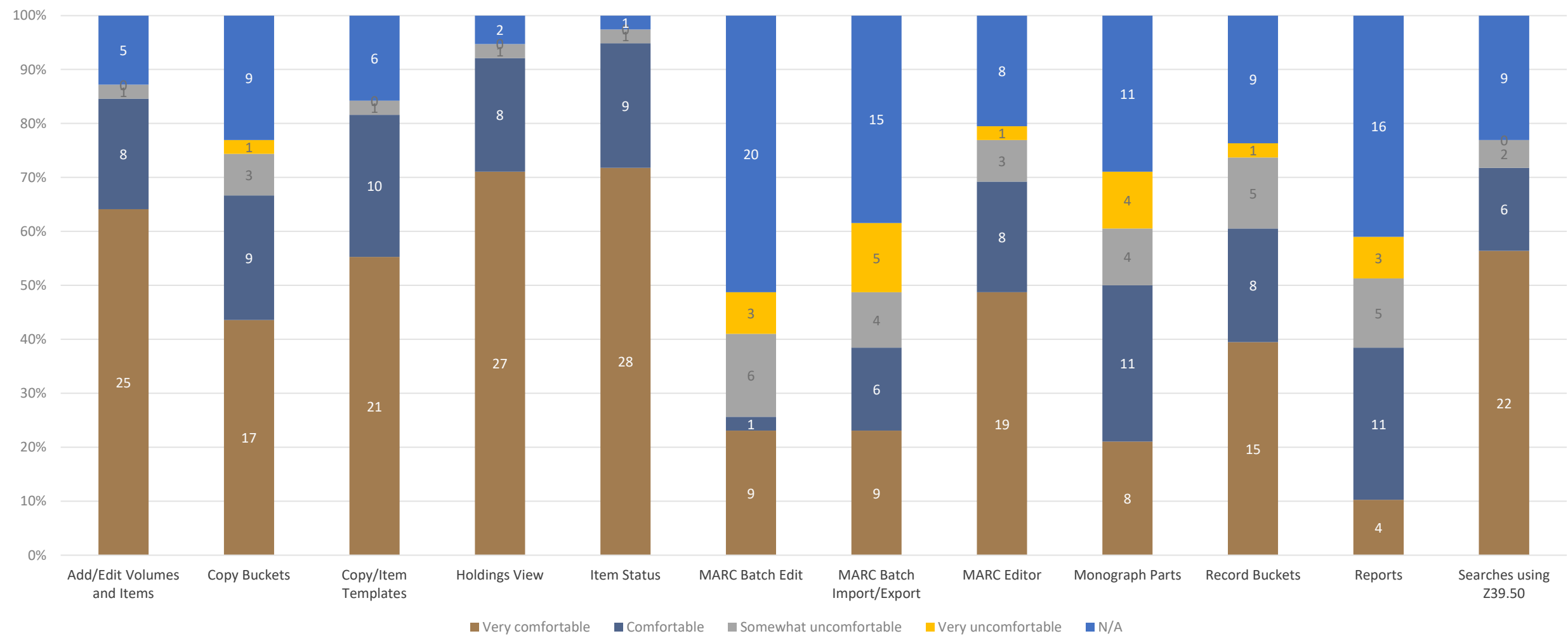
Annual Staff Survey

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



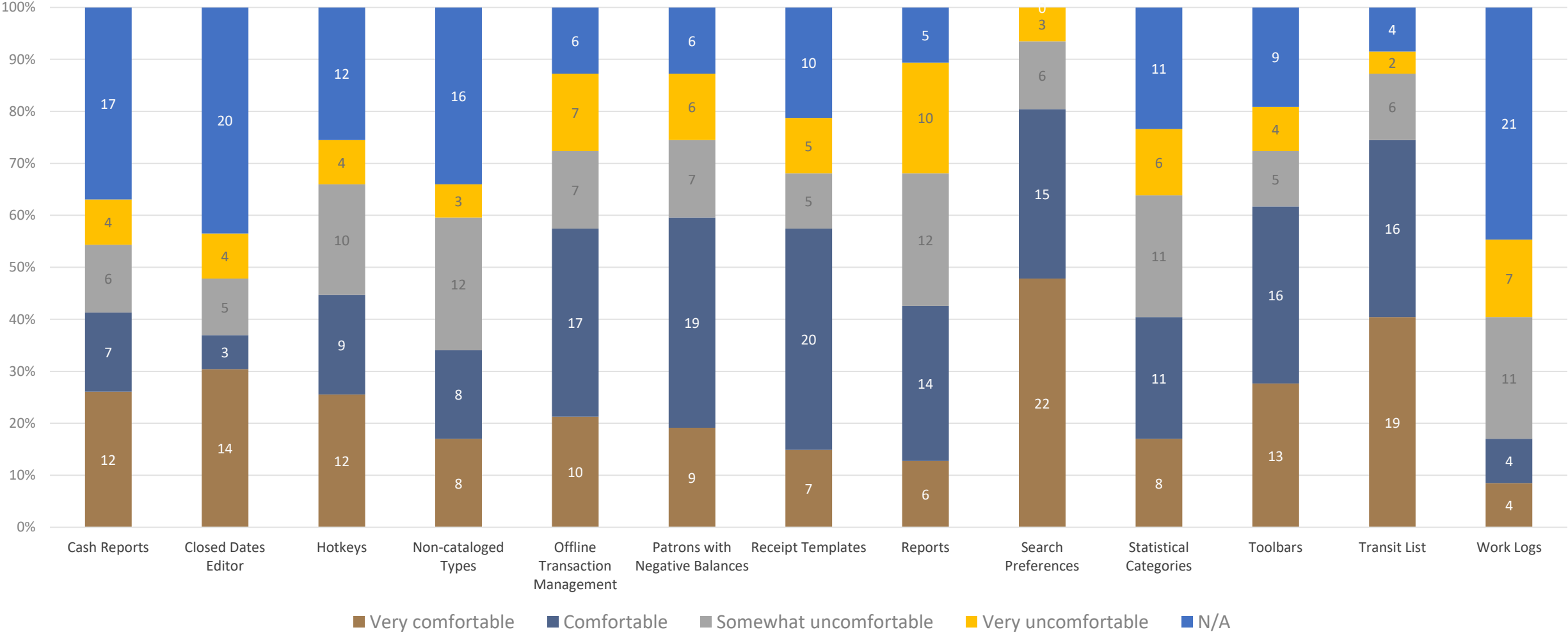
Annual Staff Survey

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



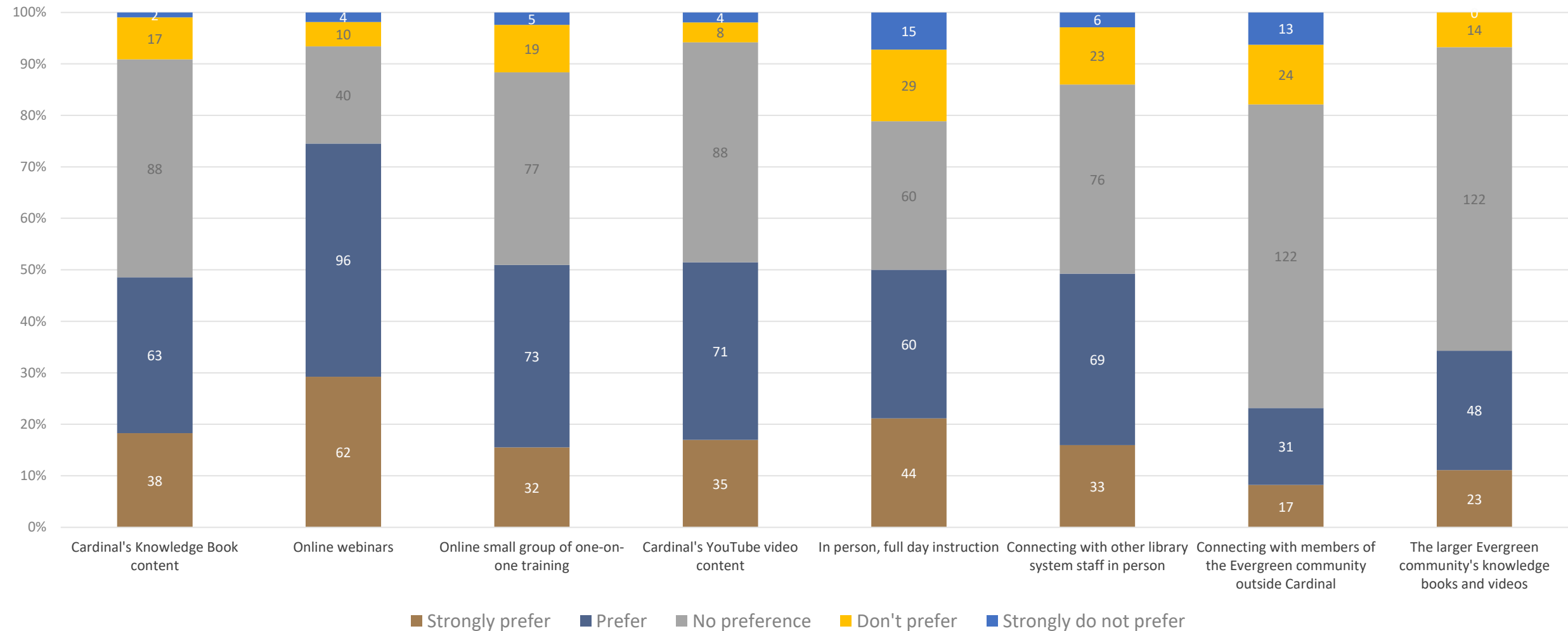
Annual Staff Survey

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



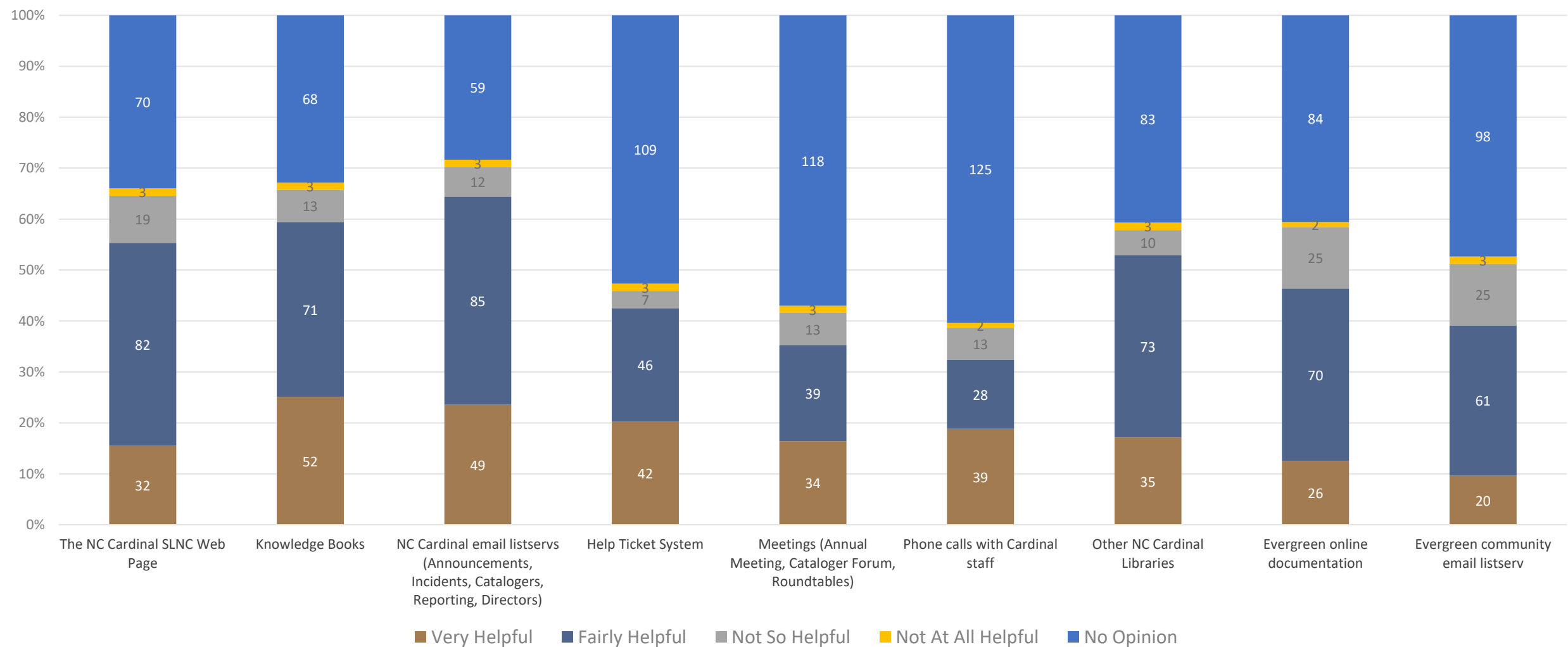
Annual Staff Survey

Which of these training and education mechanisms do you prefer?



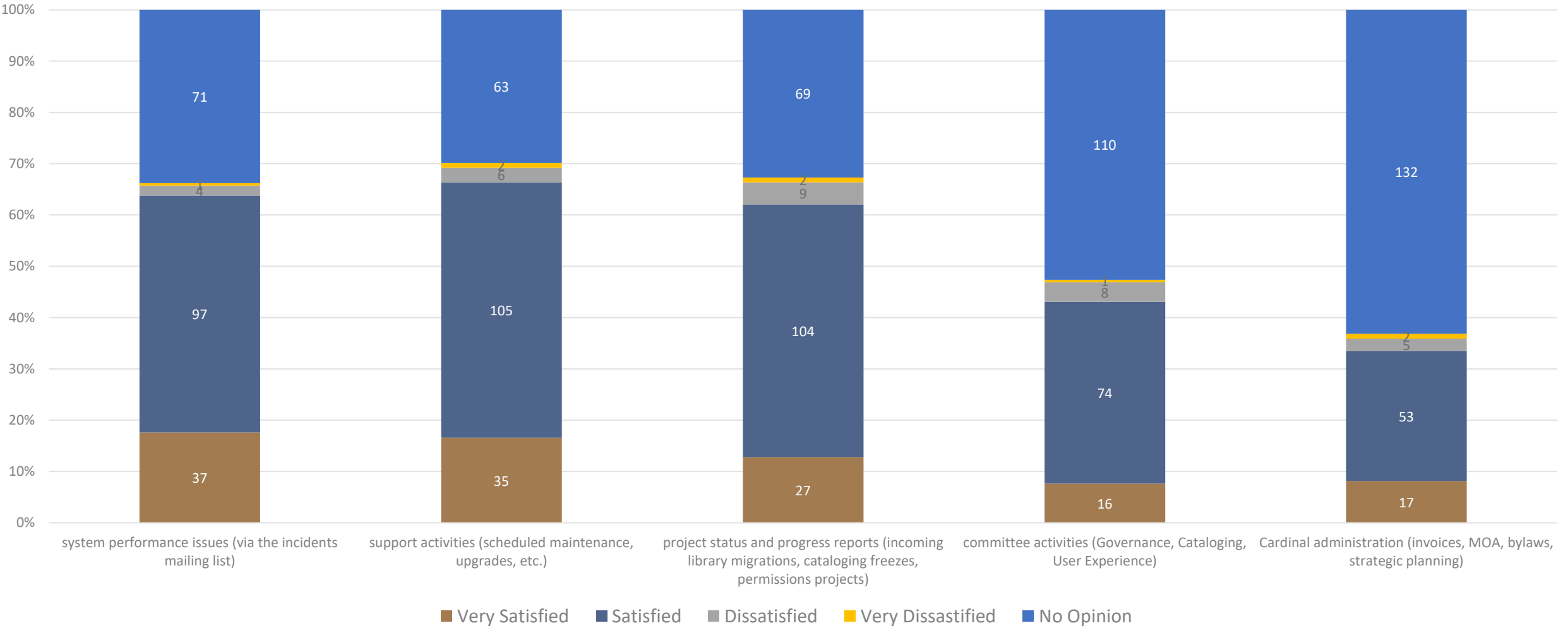
Annual Staff Survey

How useful do you find these sources of information?



Annual Staff Survey

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





Some Upcoming Projects

Patron Purge

Each library can set their own criteria for which accounts to remove

- Keep account if it has been active recently?
- Keep account if fines over what threshold?
- Keep account if certain number of books out?
- Only remove certain patron types?

We'll provide you with a list of accounts up for removal for you to review.

Electronic Resources

- Goals:
- Clean up the electronic resources in the catalog
- Improve the ingestion processes for new materials
- Ensure regular updates when libraries join Cardinal
- Deduplicate records between various vendors



E-book

Digital Content

- <http://link.overdrive.com/?websiteID=>
- <https://samples.overdrive.com/?crid=>

Thank You!

