SLNC NC Research. Library Support. Talking Books.

NC Cardinal

8th Annual Report: FY 2019-2020

Year In Review

The Cardinal Team

Courtney Brown
NC Cardinal Systems Librarian

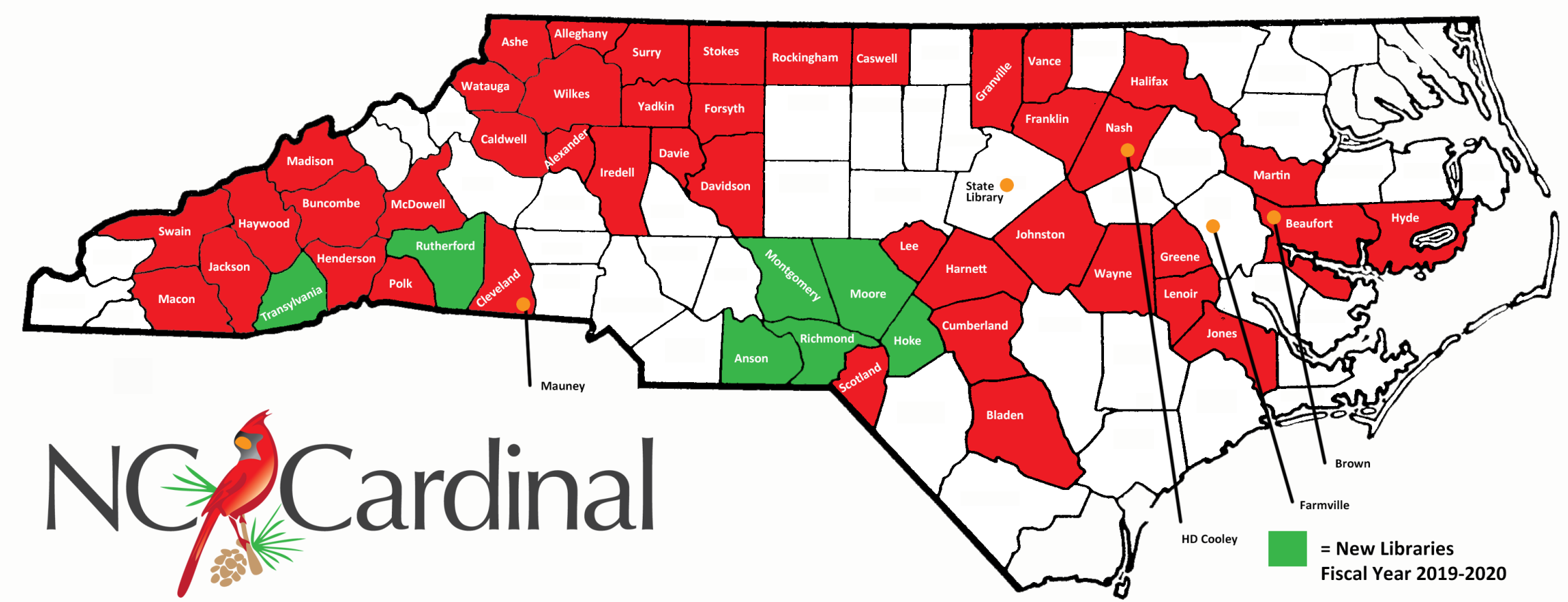
Benjamin Murphy
NC Cardinal Program Manager

April Durrence
NC Cardinal Training Specialist

Llewellyn Marshall
NC Cardinal Application Administrator / Developer

Anna Pietzman
NC Cardinal Project Manager

NC Cardinal in 2019-2020

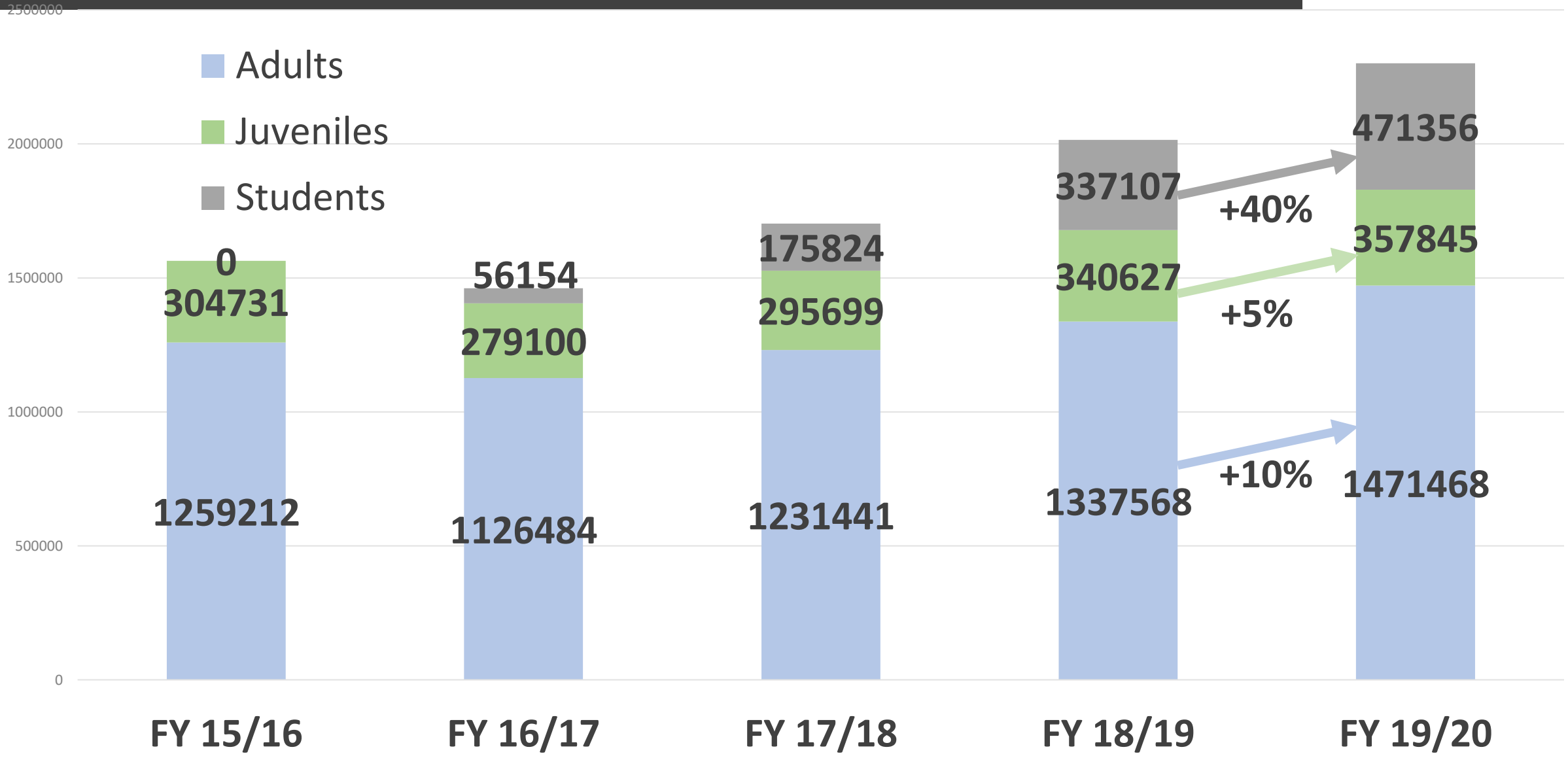


NC Cardinal

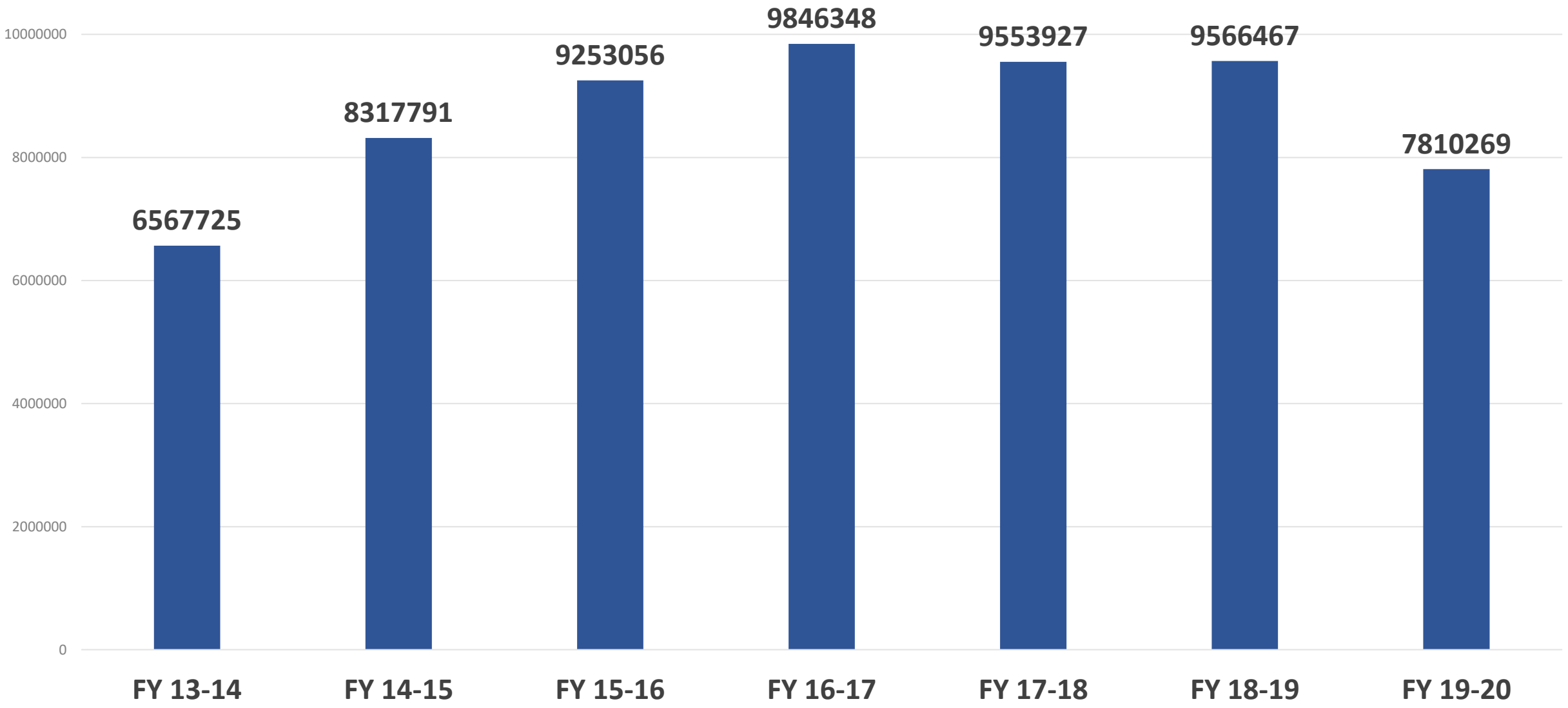
43 counties, 4 municipalities, 7 Special Libraries
164 branches

50 counties, 4 municipalities, 7 Special Libraries
183 branches

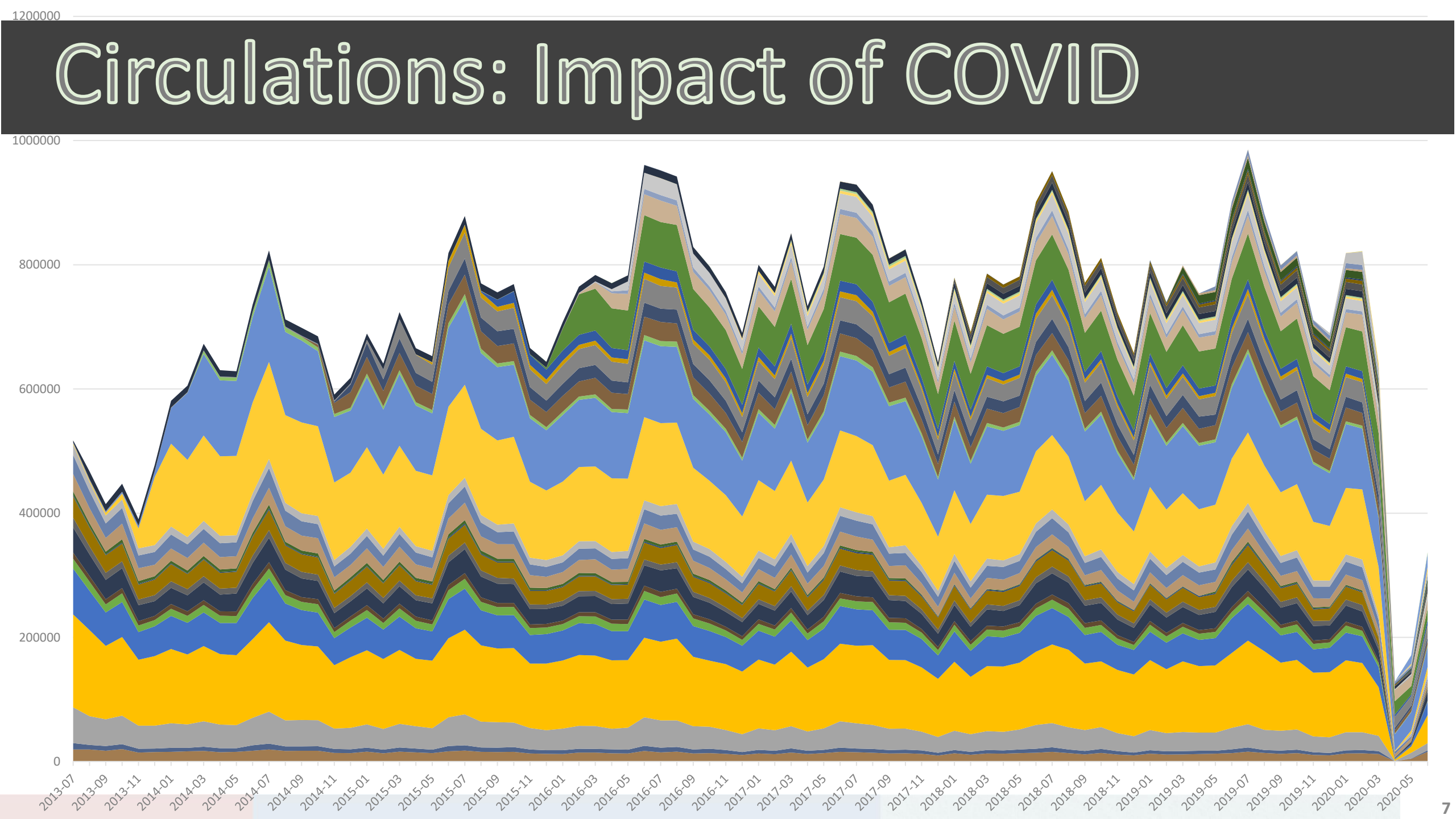
Active User Accounts



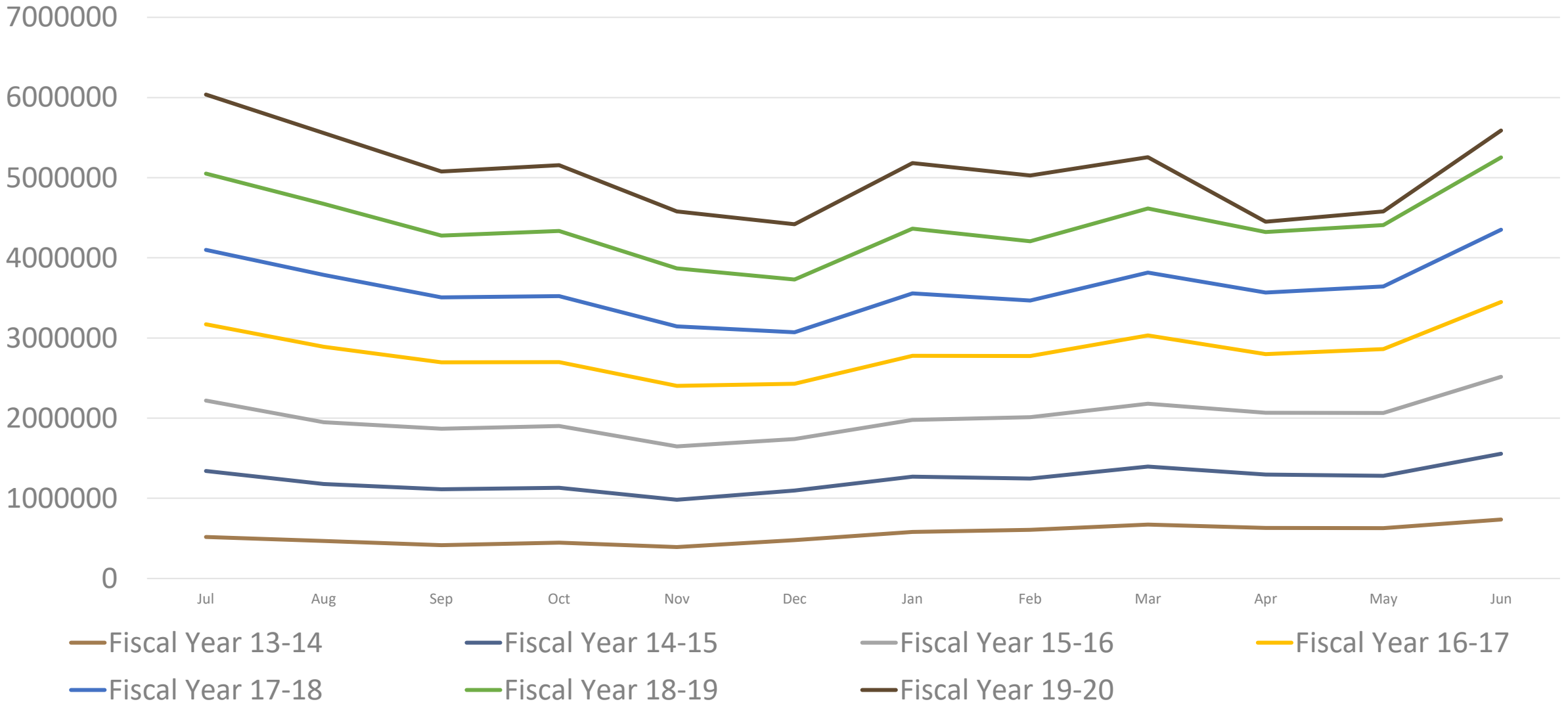
Circulations



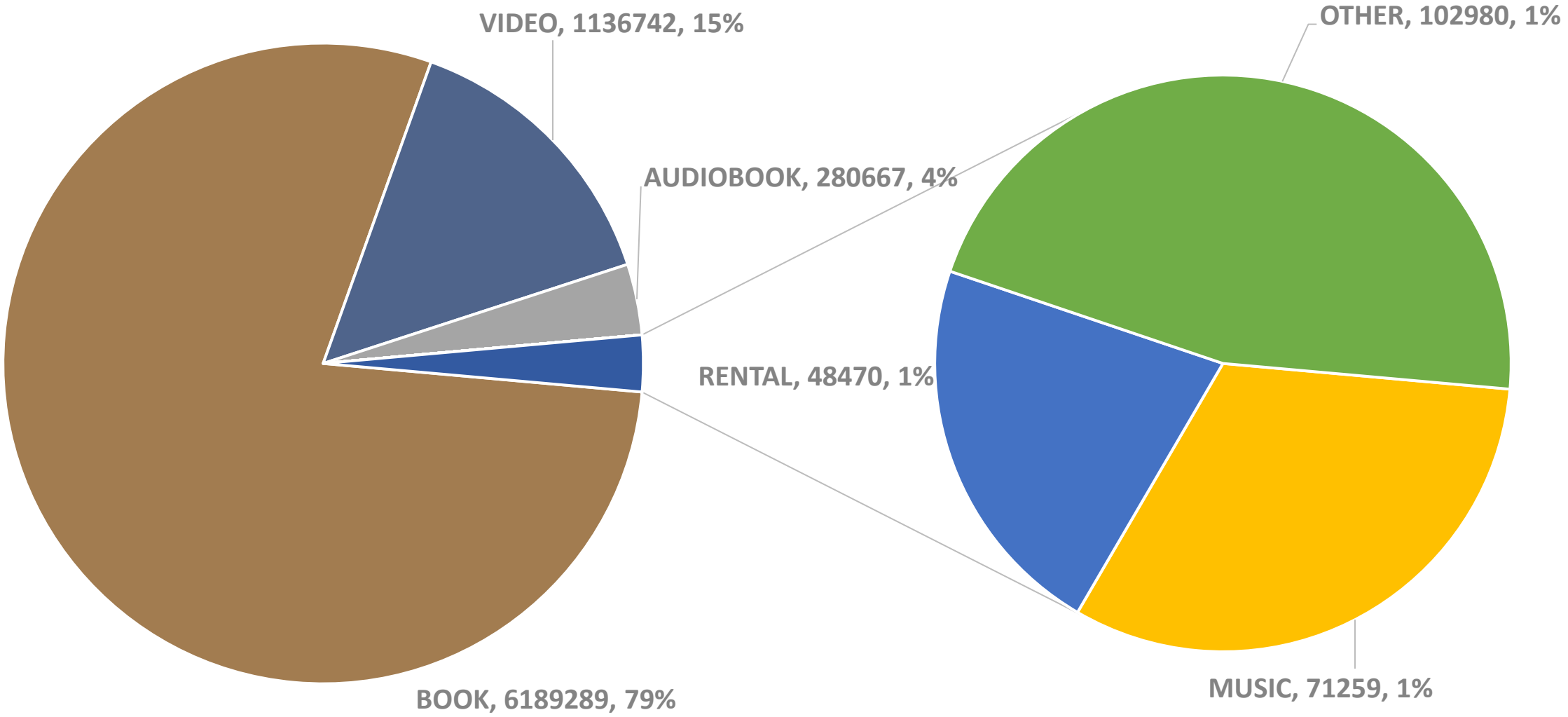
Circulations: Impact of COVID



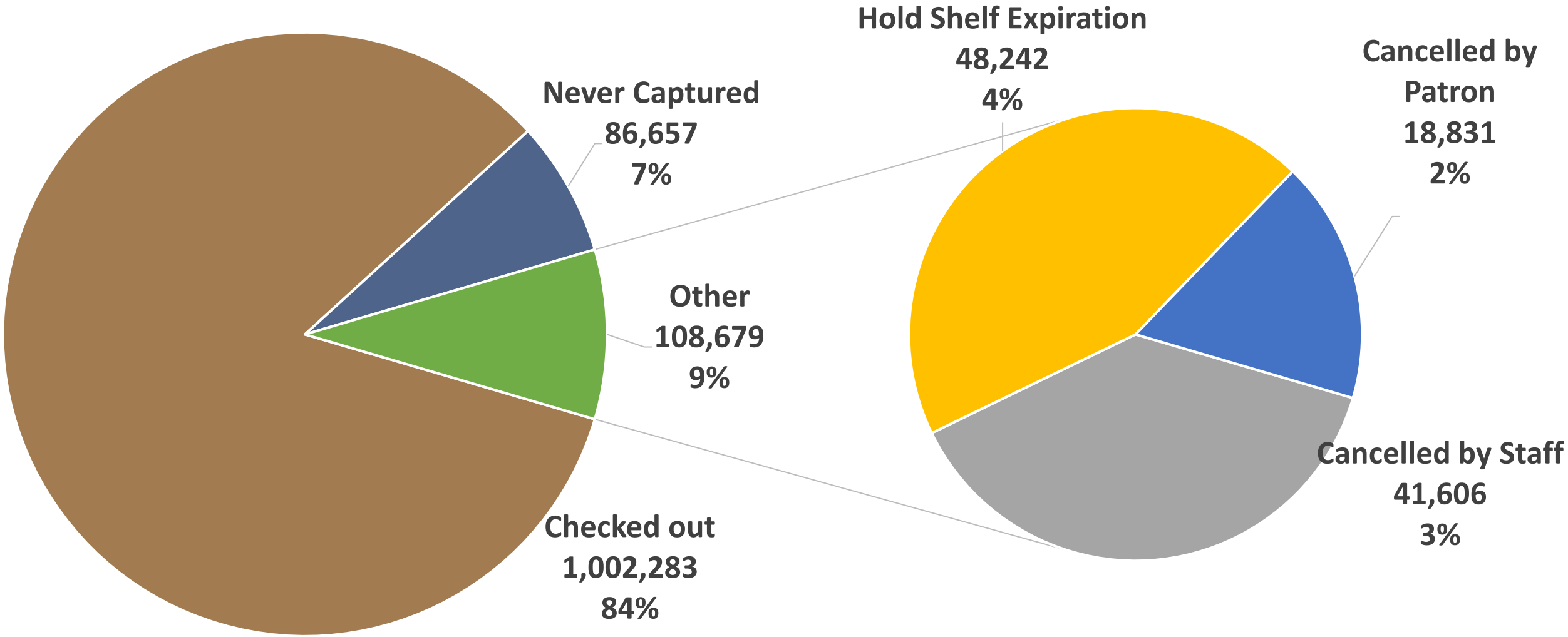
Circulations: Comparing Year to Year



Circulations By Item Type



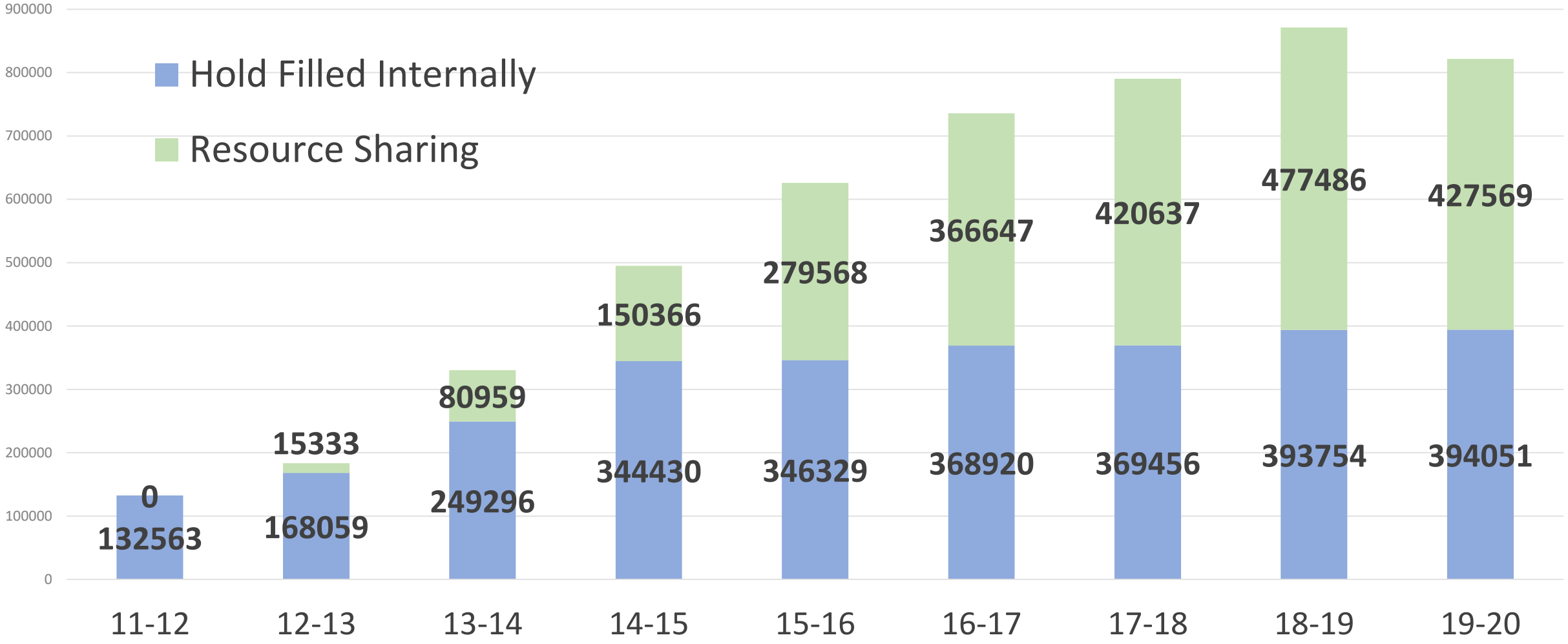
Outcome of Hold Requests



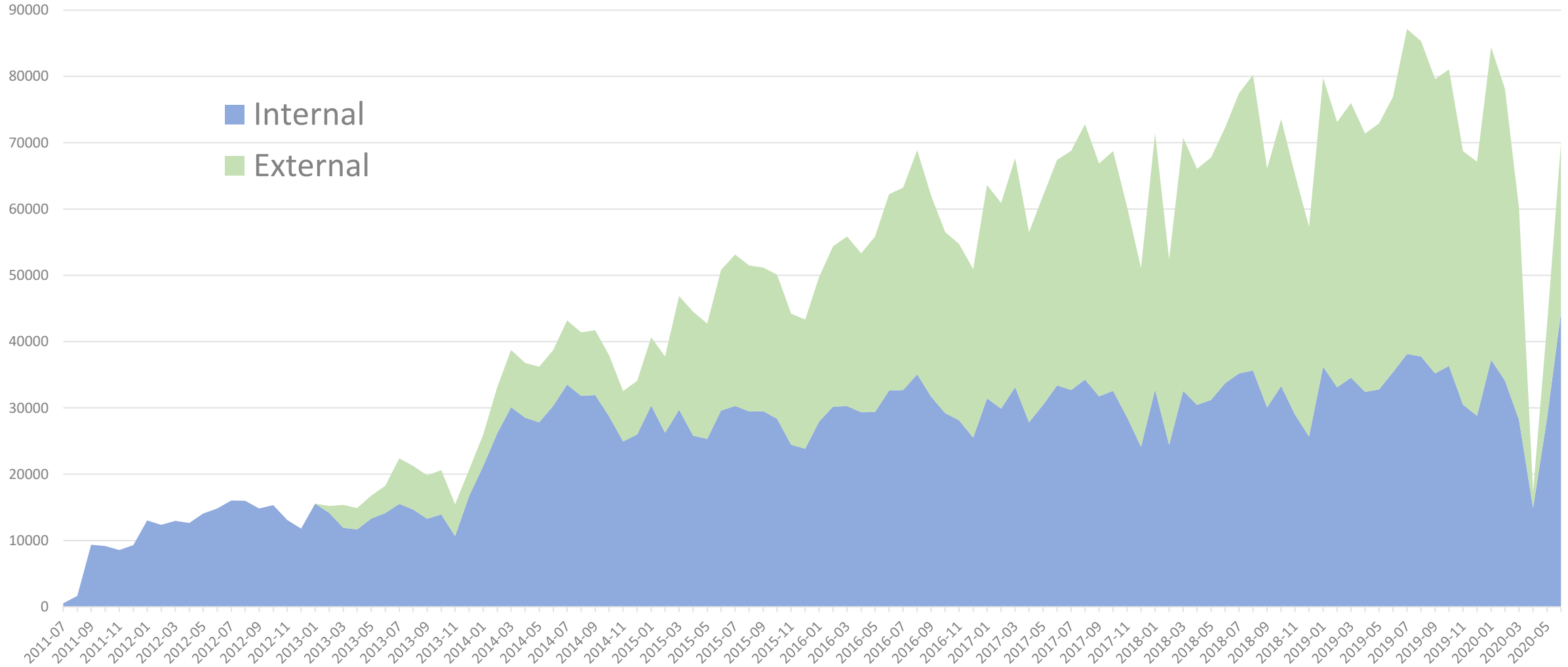
Total Hold Requests: 1,203,270

Resource Sharing

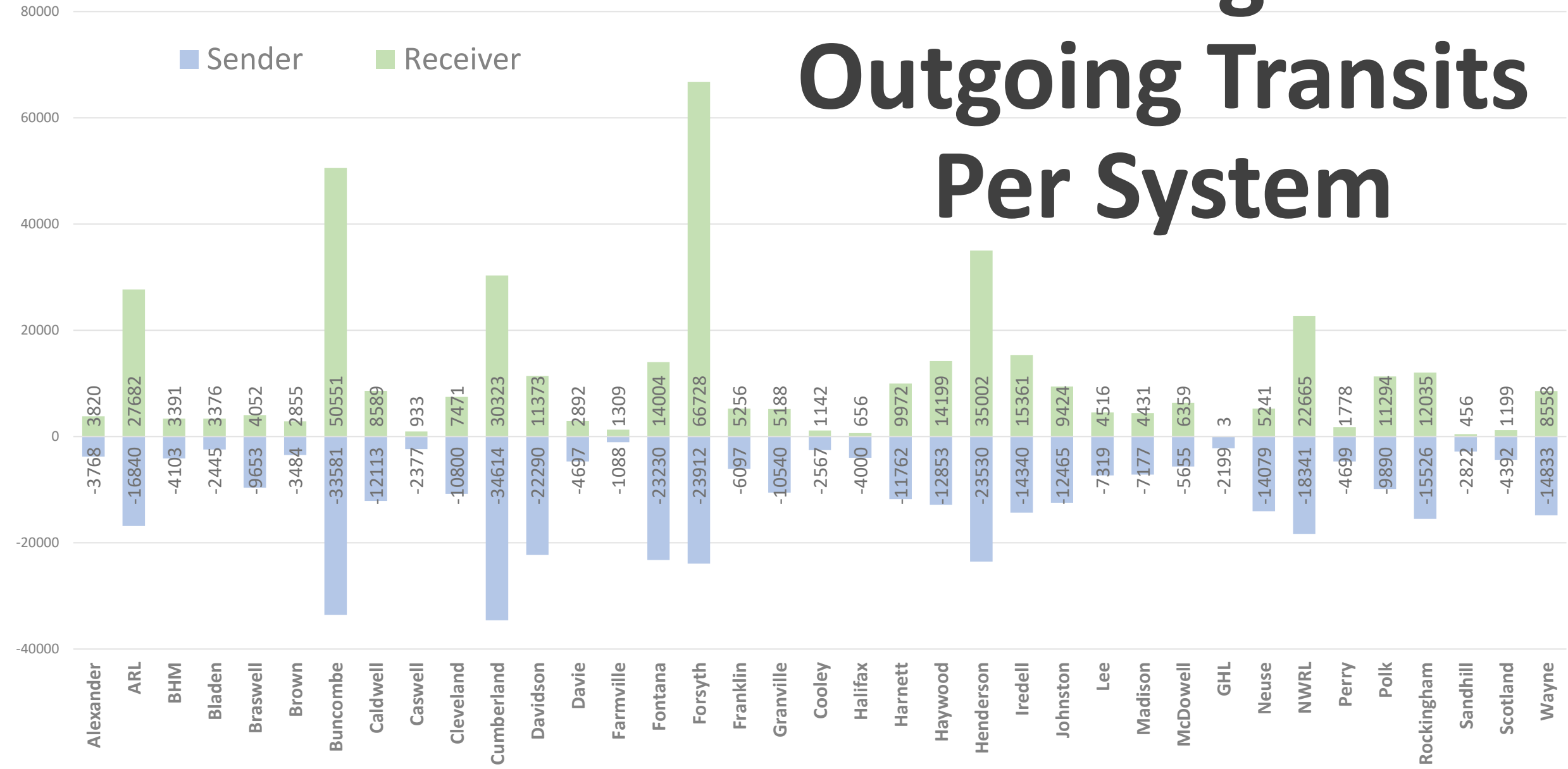
Resource Sharing: Source of Transit Holds



Resource Sharing: Source of Transit Holds



Incoming and Outgoing Transits Per System



Student Access Program

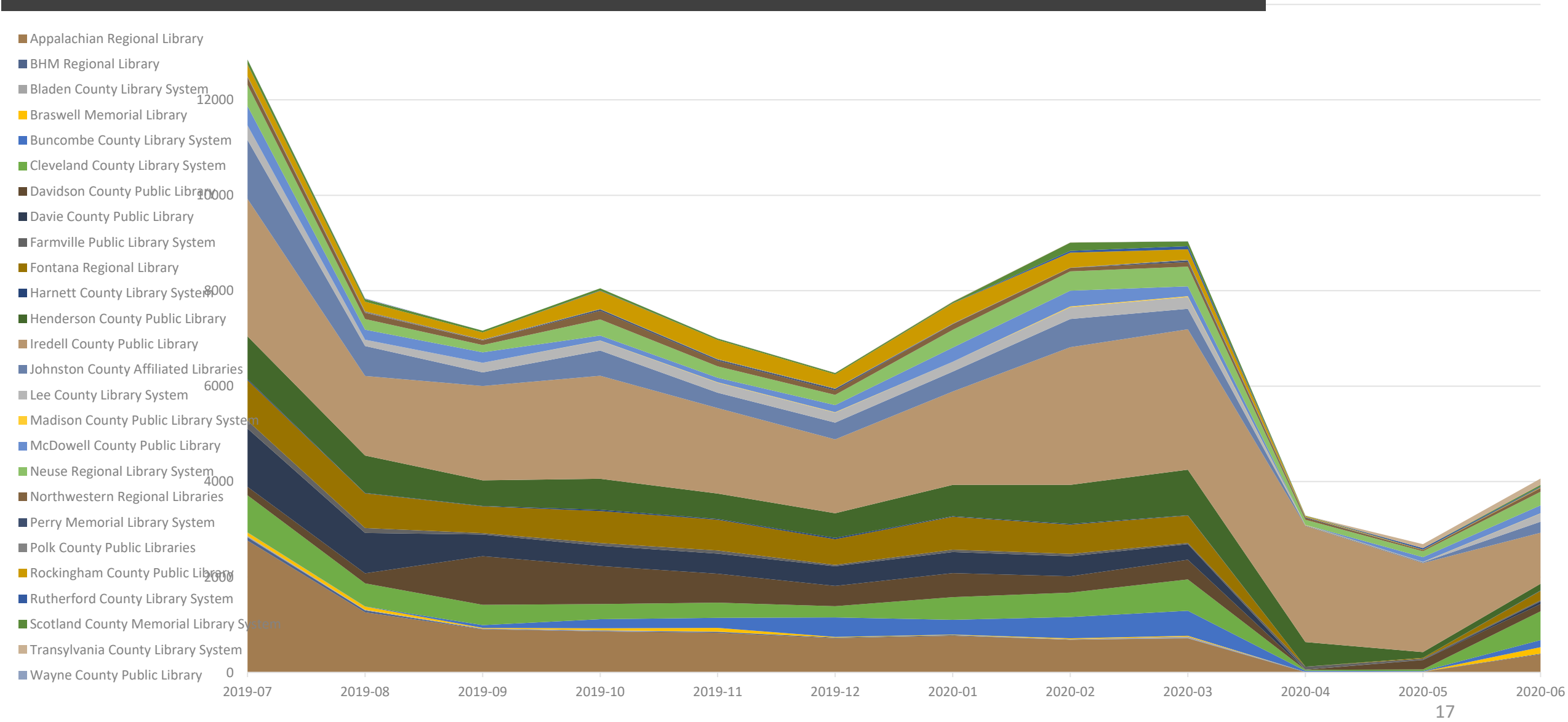
Student Access

27 Library Systems Participating
401,164 active accounts this year

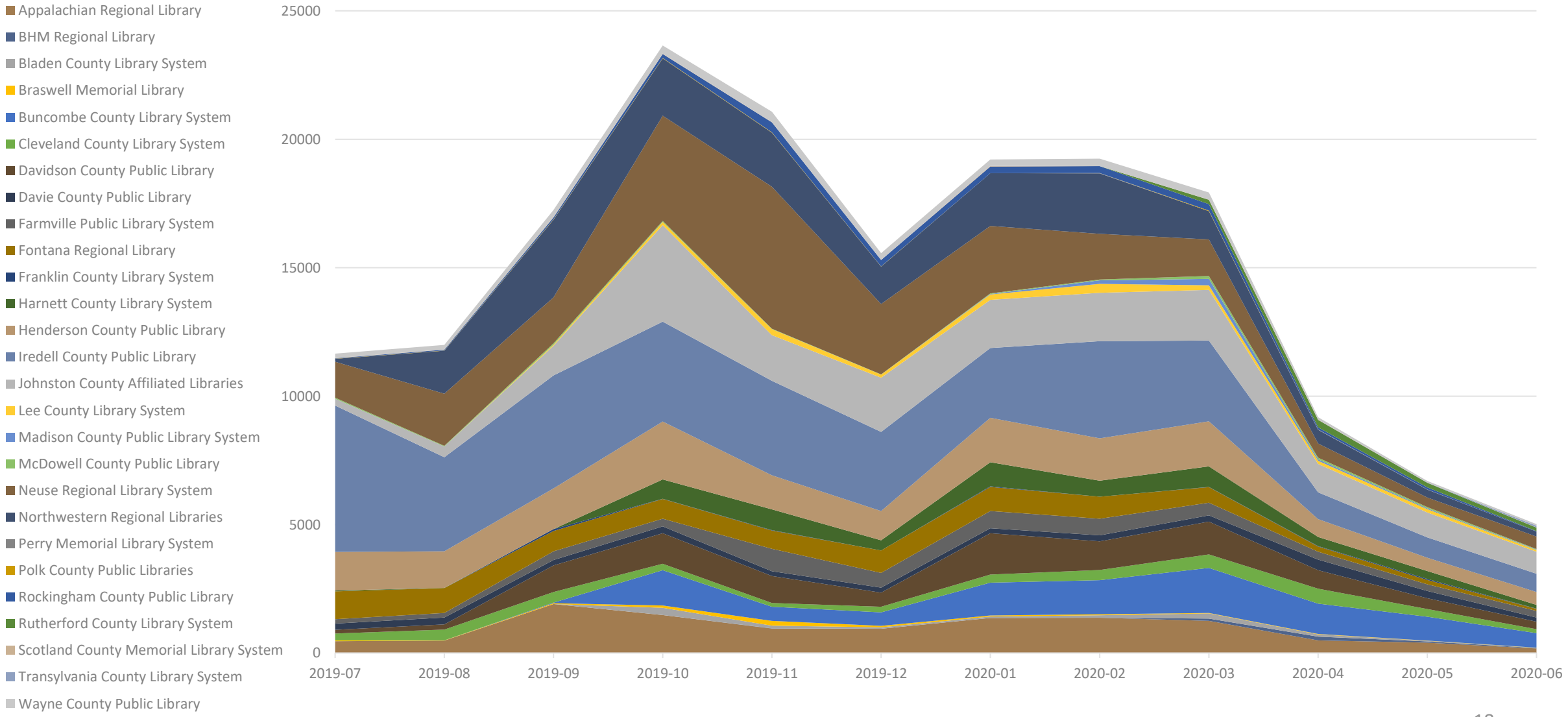
Checkouts
10,188 total users (3%) checked something out
85,056 total checkouts
Average 8.35 items per person

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

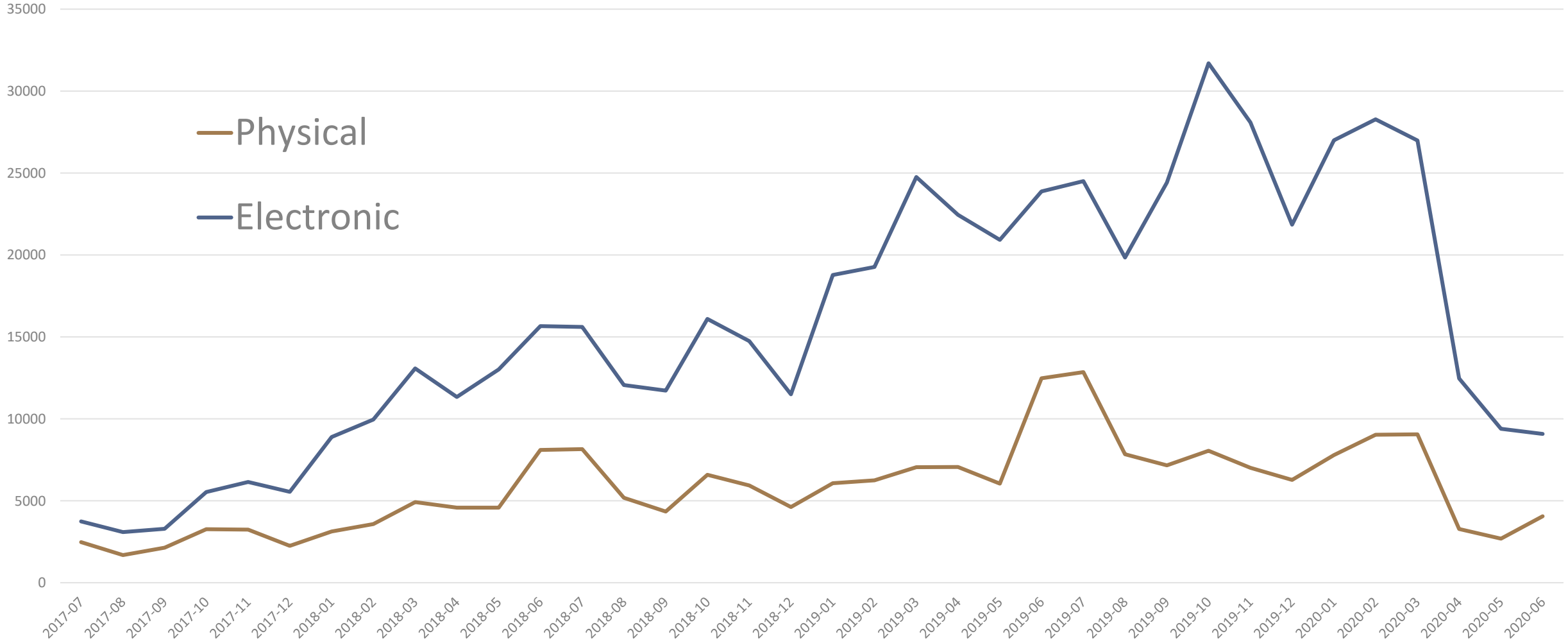
Student Access Circulations



Student Access Authentications

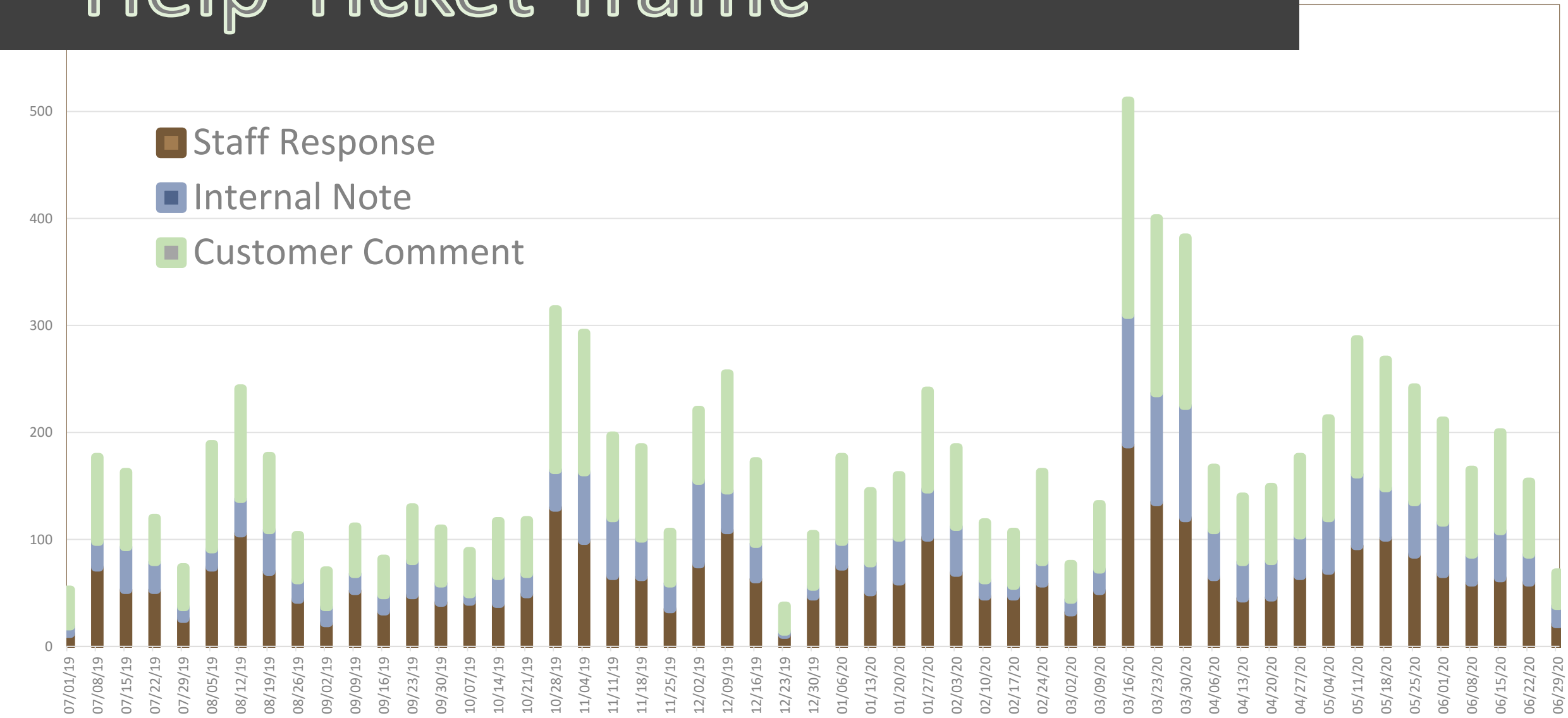


Student Access Over Time



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)34028
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)34002
   ‡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
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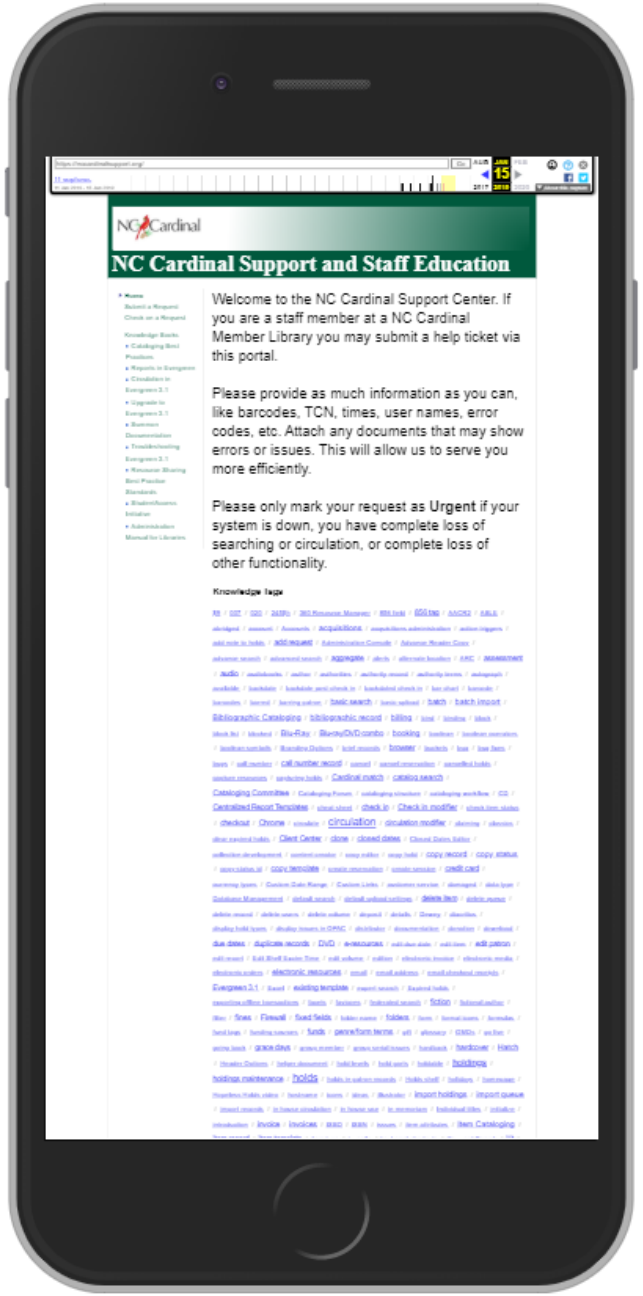
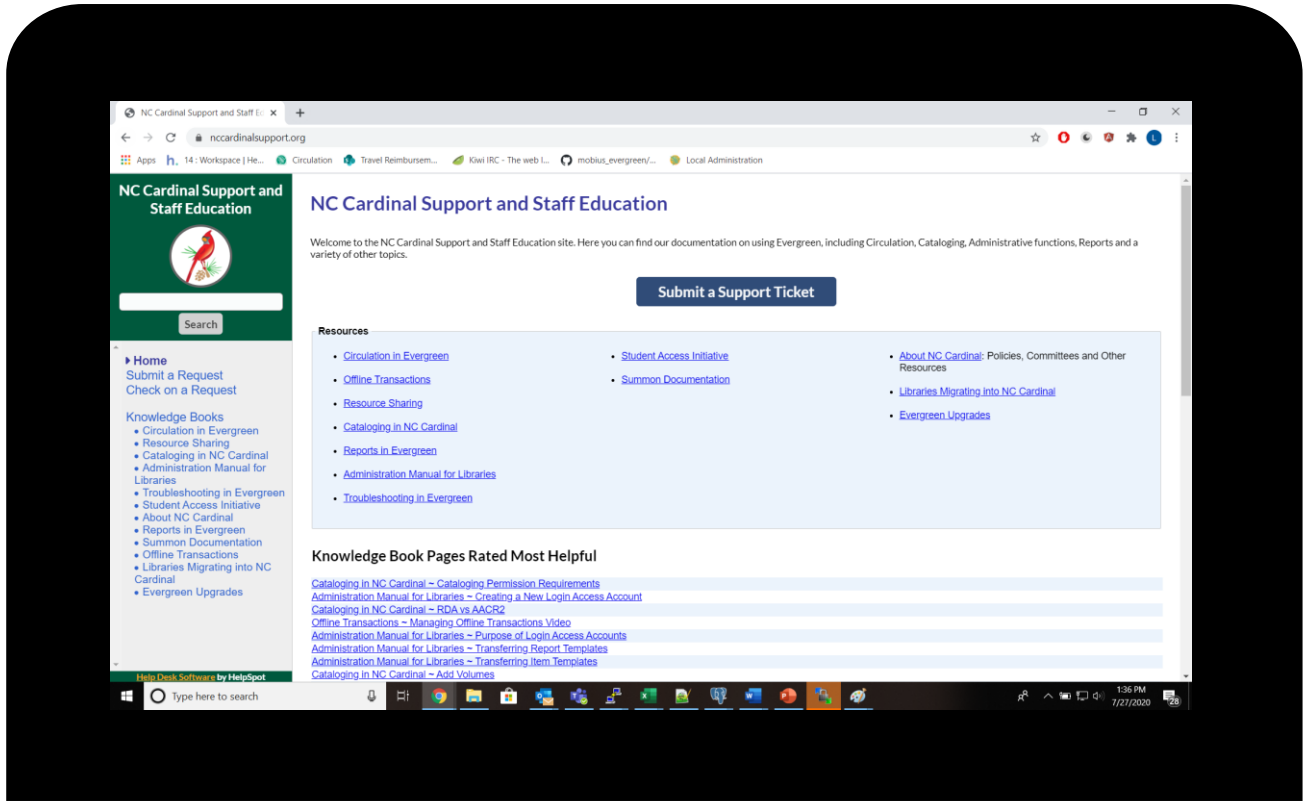
Support Site Redesign

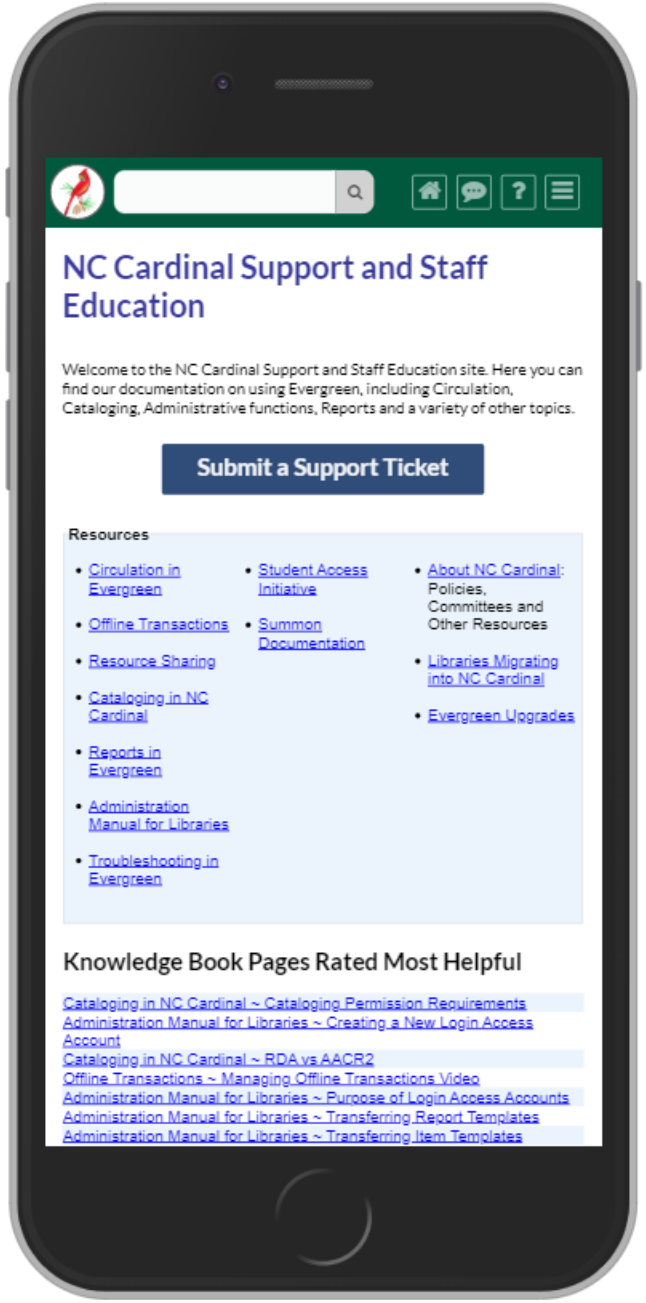
Support Site Redesign



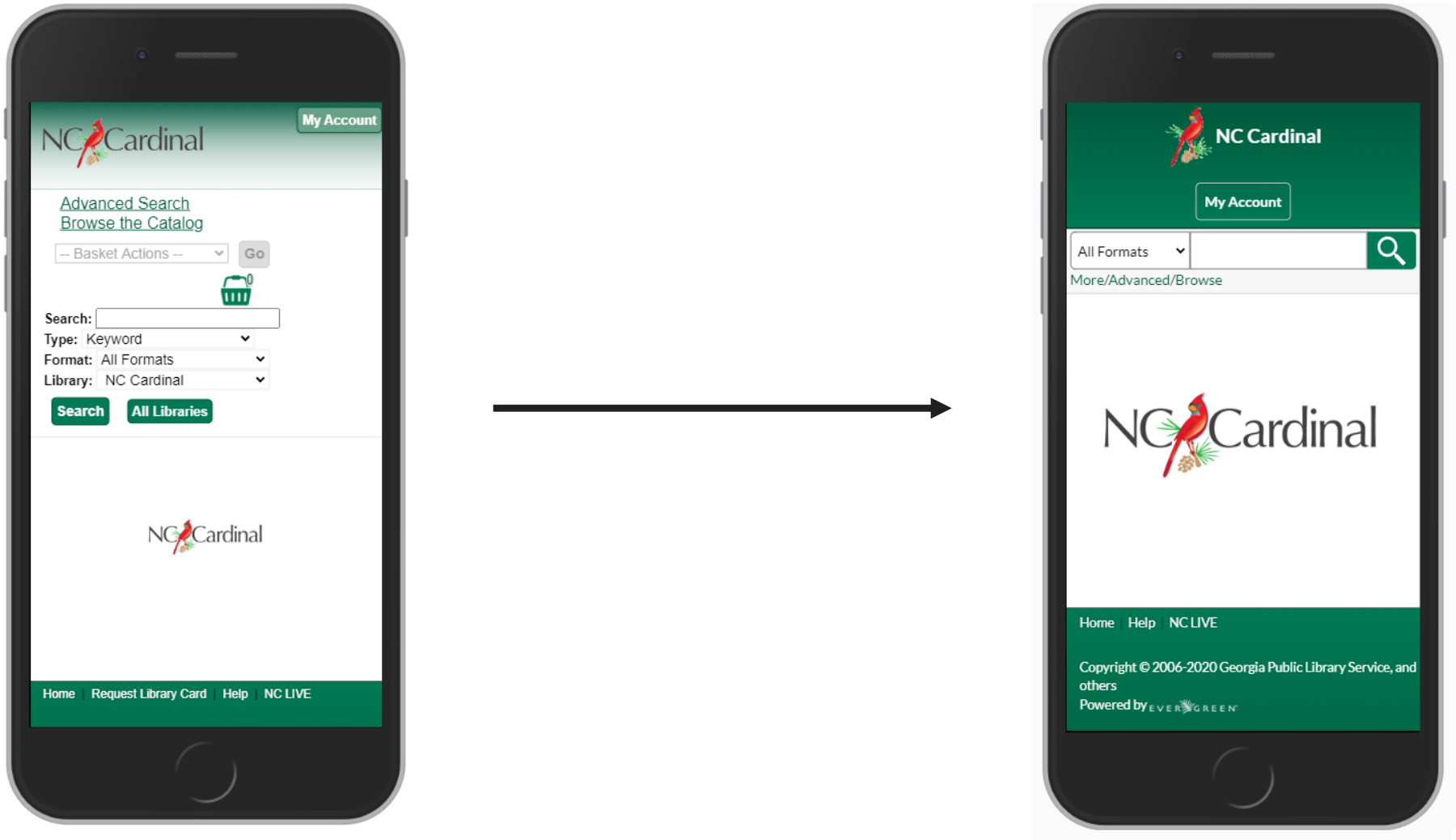
Support Site Redesign



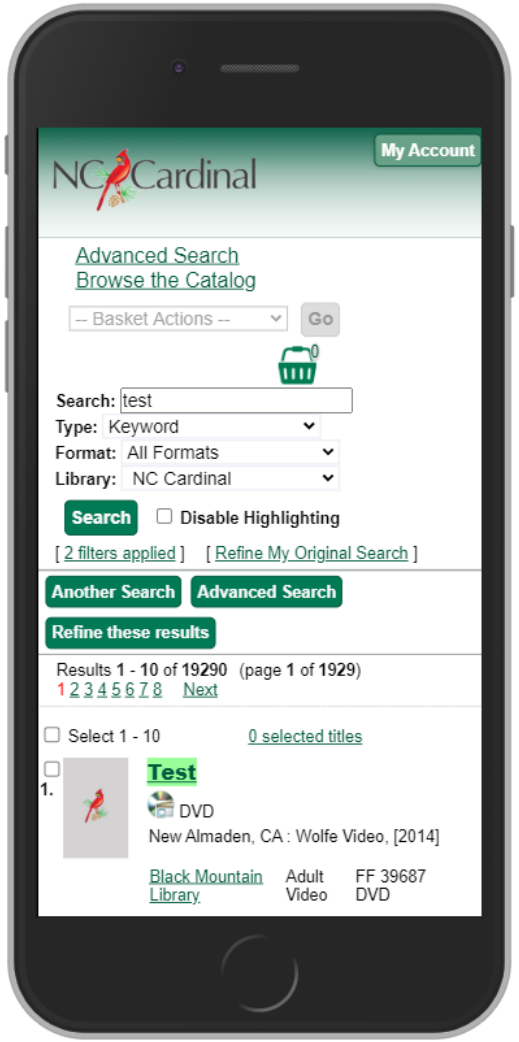
Support Site Redesign

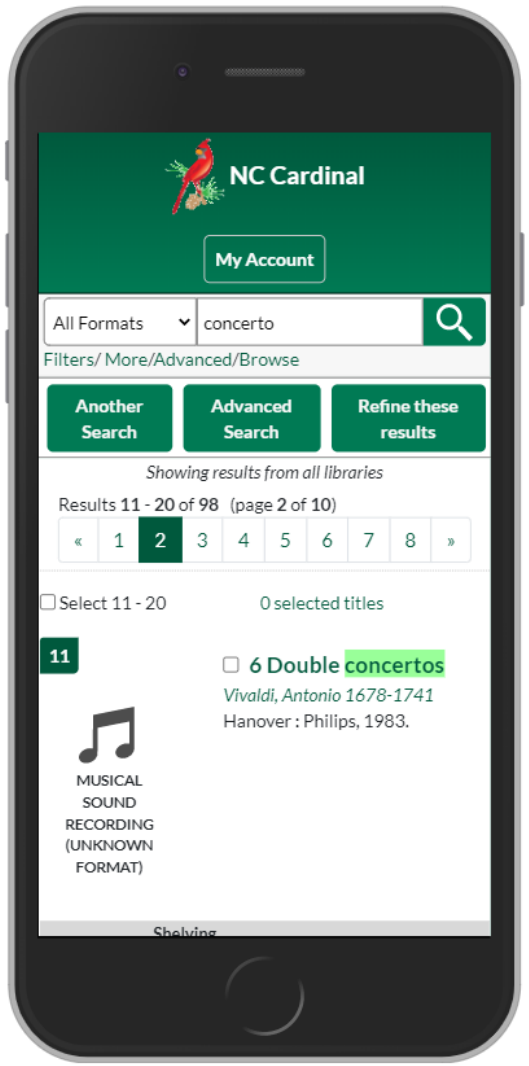


Future OPAC Enhancements



Future OPAC Enhancements

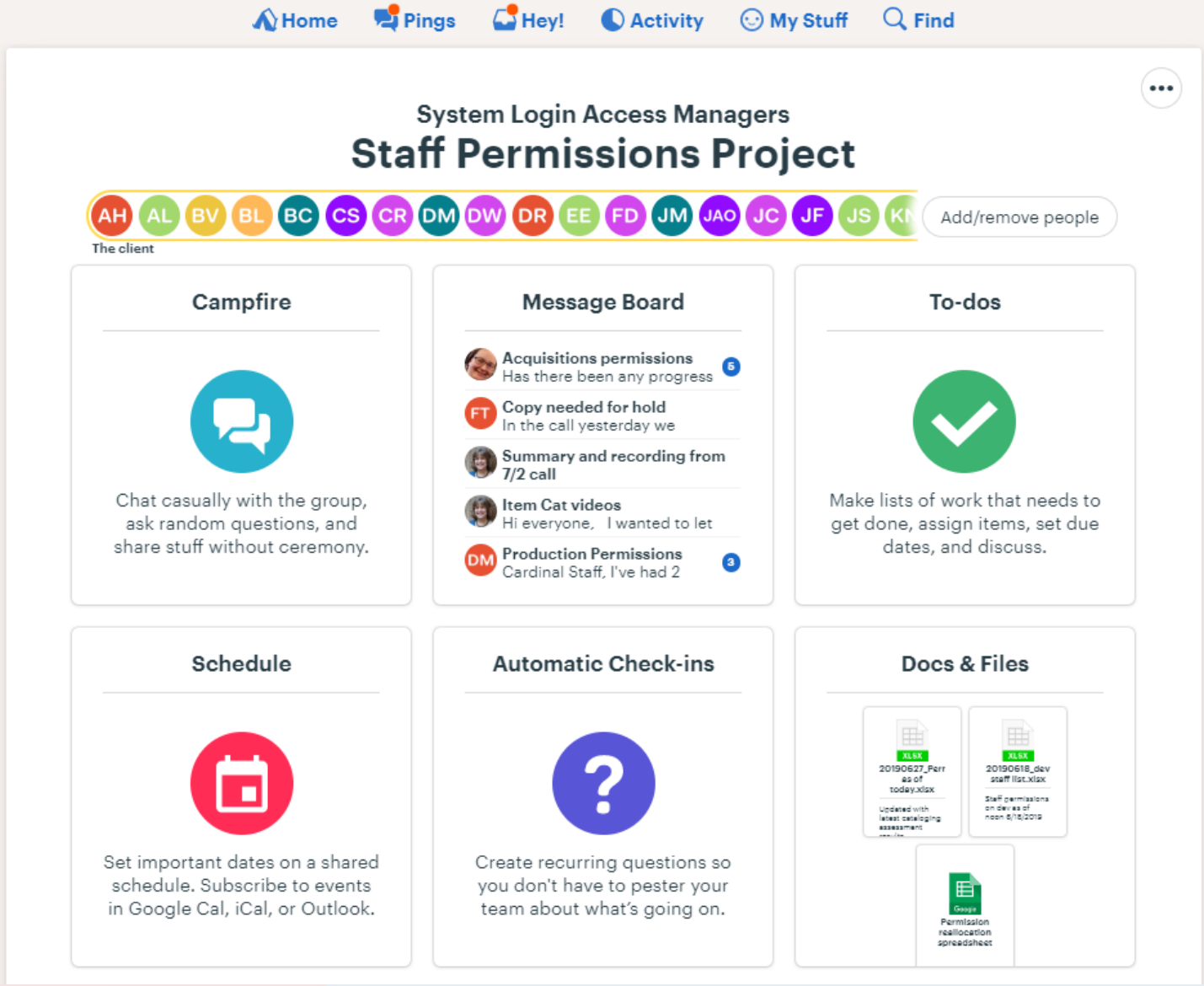




Staff Permissions Project

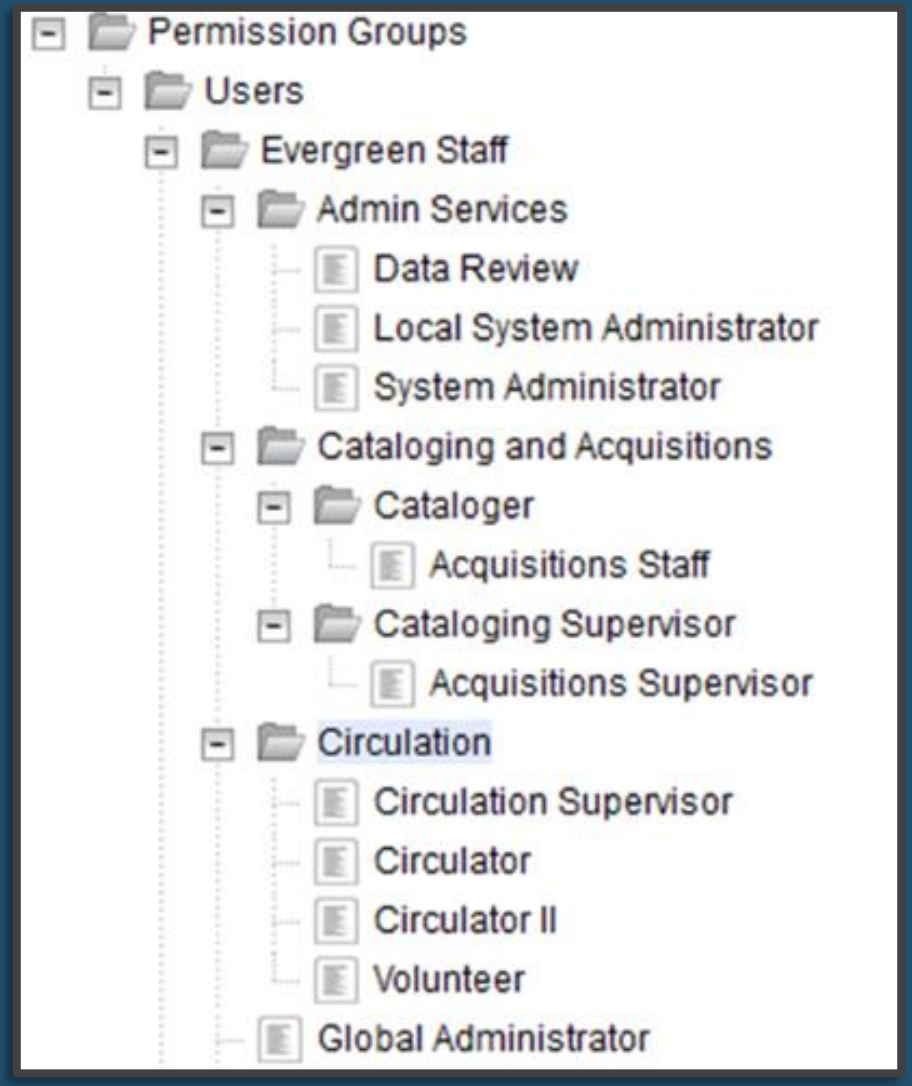
- Create efficient inheritance structure [assign permissions thoughtfully and only once]
- SLAMs for each library system to manage staff login accounts [ensure appropriate staff access to patron data and improve data security & integrity]
- Consolidate cataloging & acquisitions permissions into Item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

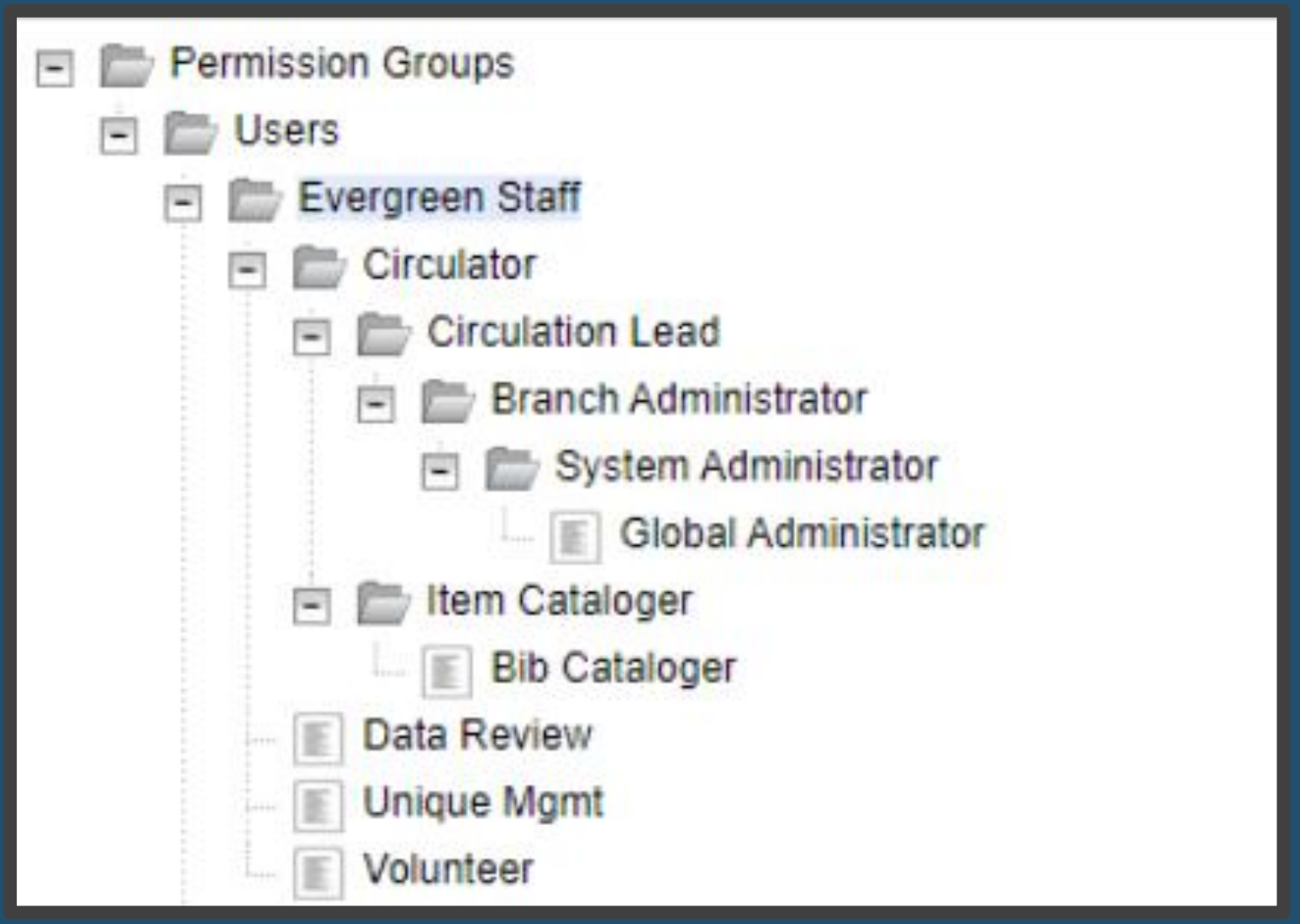
Staff Permissions Project



- 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

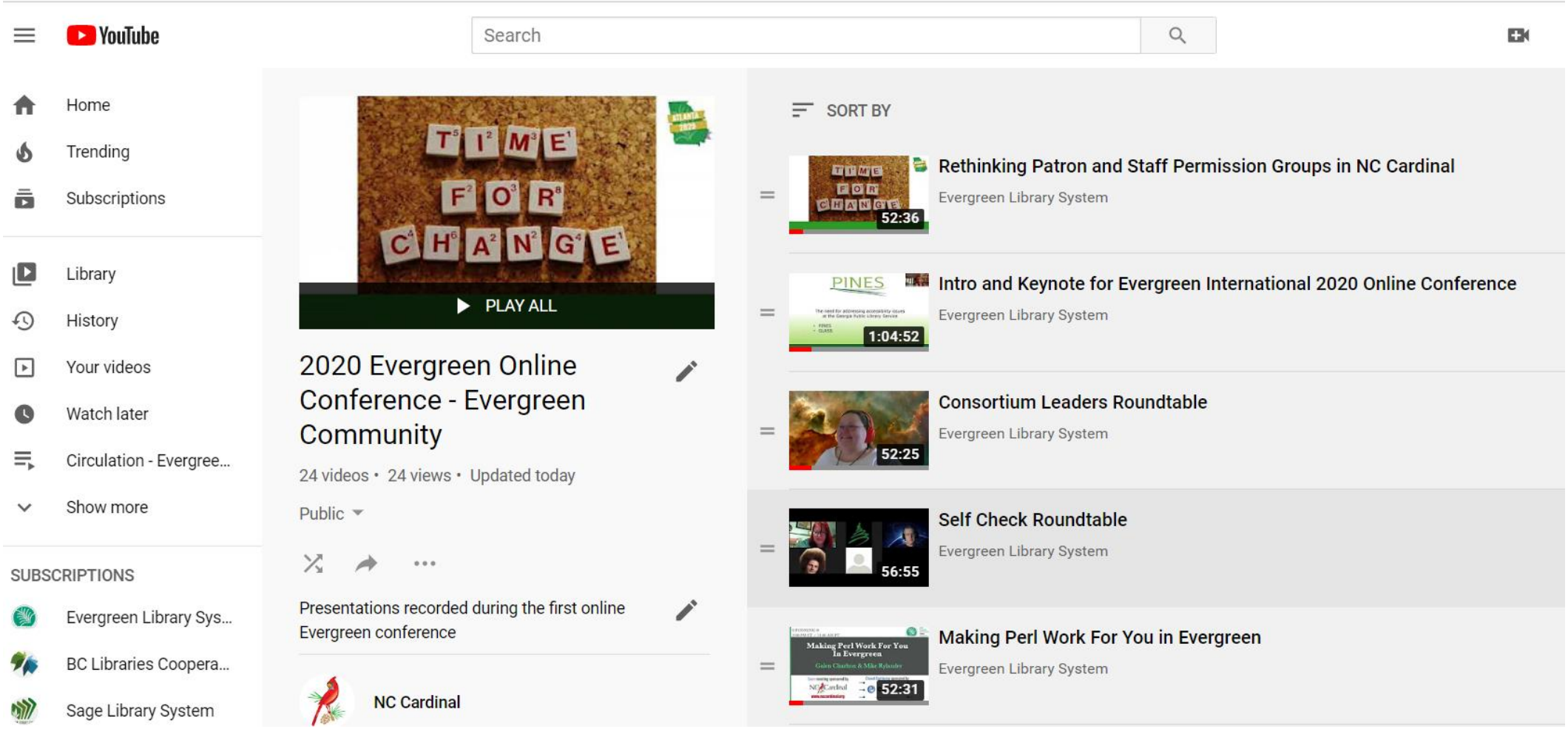
Staff Permissions Project





Staff Permissions Project

Playlist with our presentation for 2020 Evergreen Conference on NC Cardinal channel.



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:

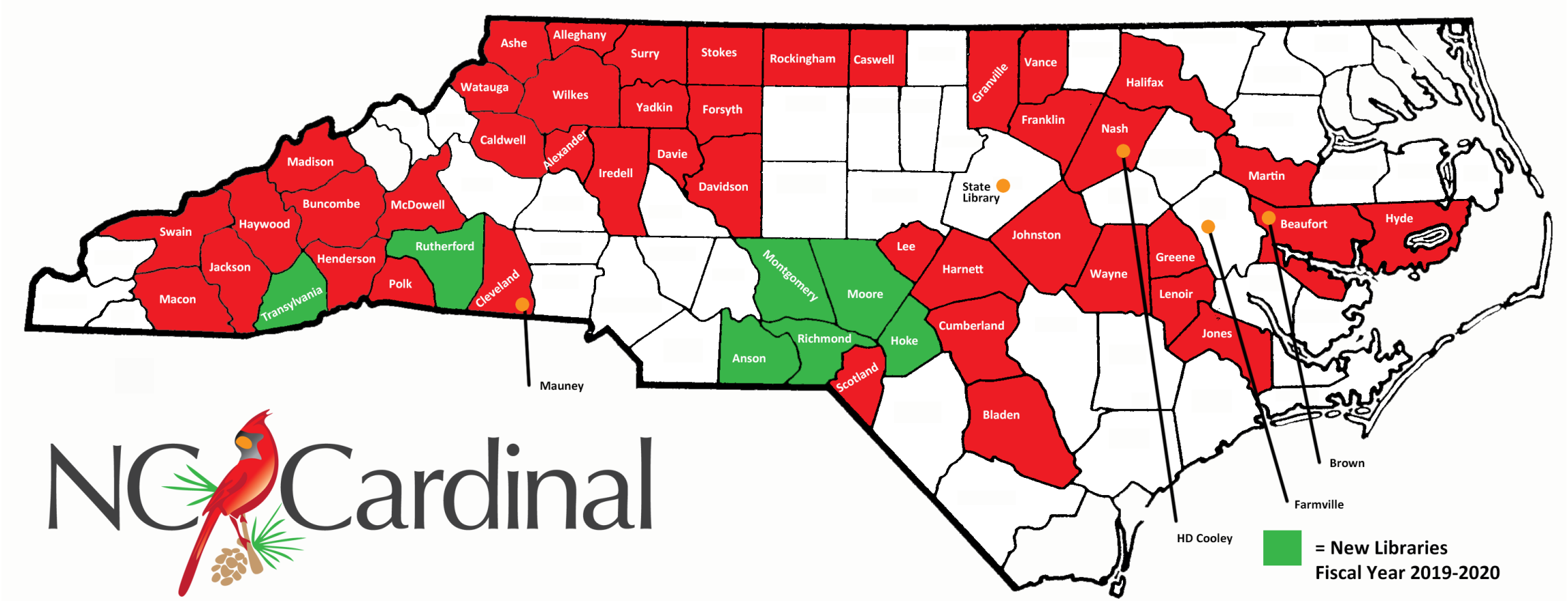
- Testing Google Classroom
- Niche Academy
- In-person training

After Covid-19:

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

Library Migrations

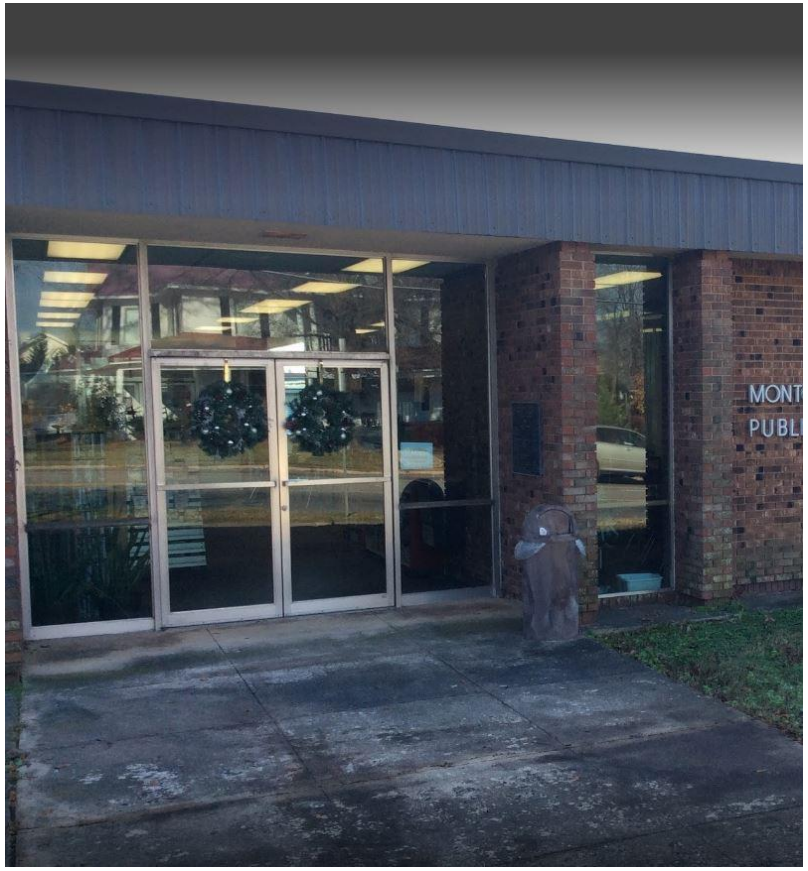
Library Migrations in 19-20



NC Cardinal

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

50 counties, 4 municipalities, 7 Special Libraries
183 branches



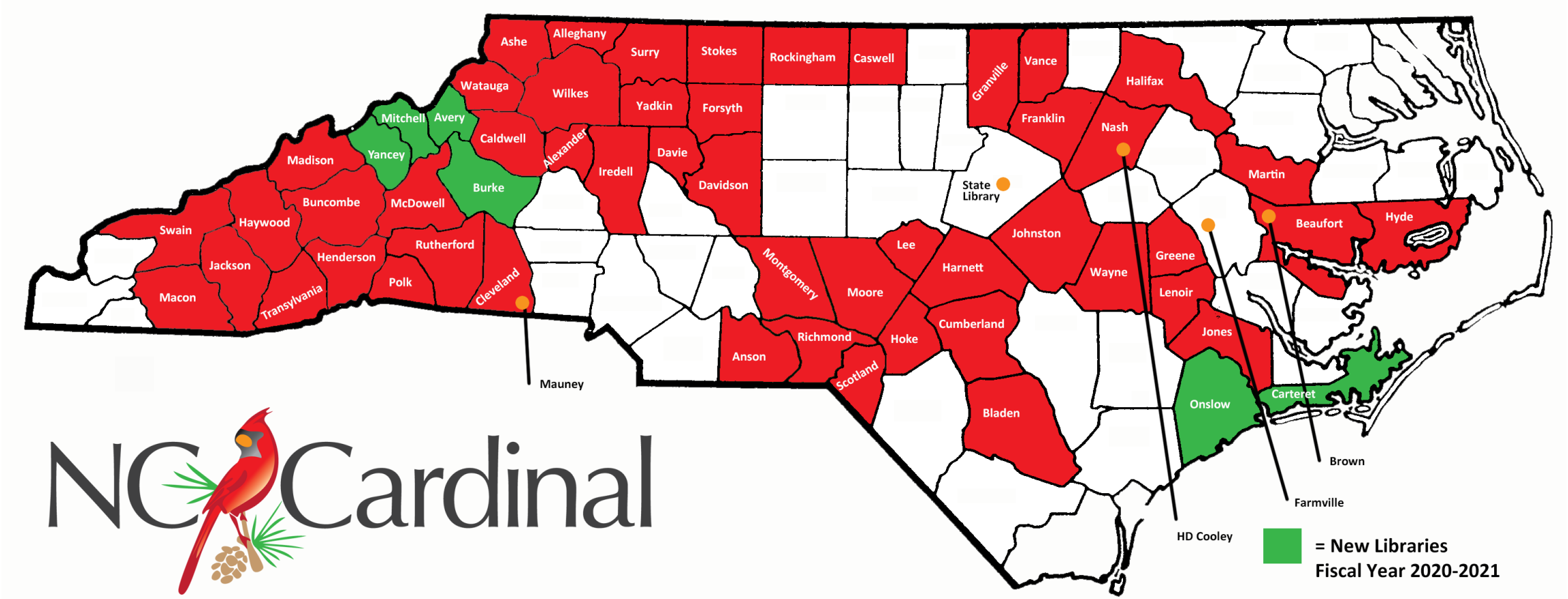
Sandhill Regional Library System

Rutherford County Public Libraries

Rutherford County Library
Mountains Branch Library
Haynes Branch Library

Transylvania County Public Library

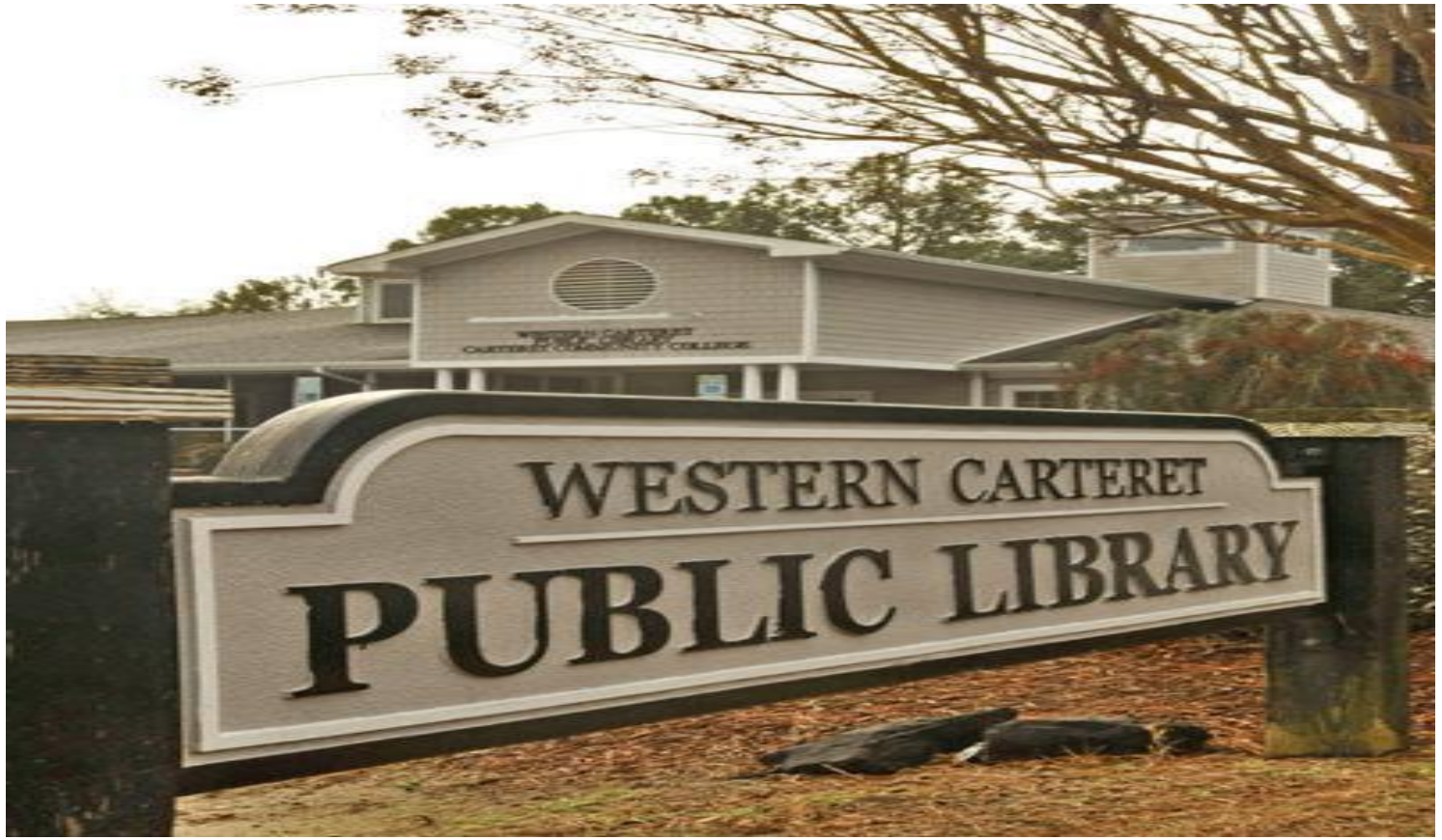
Library Migrations in 20-21



NC Cardinal

50 counties, 4 municipalities, 7 Special Libraries
183 branches

56 counties, 4 municipalities, 7 Special Libraries
199 branches



Carteret County Public Library System

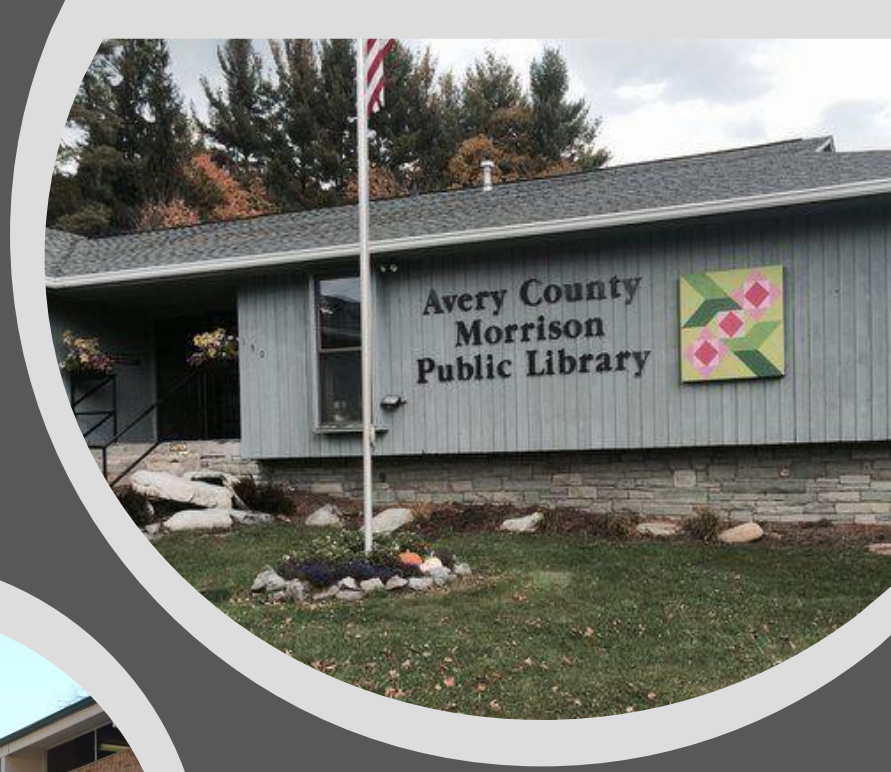
Beaufort Main
Western Carteret
Down East
Bogue Bank
Newport

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

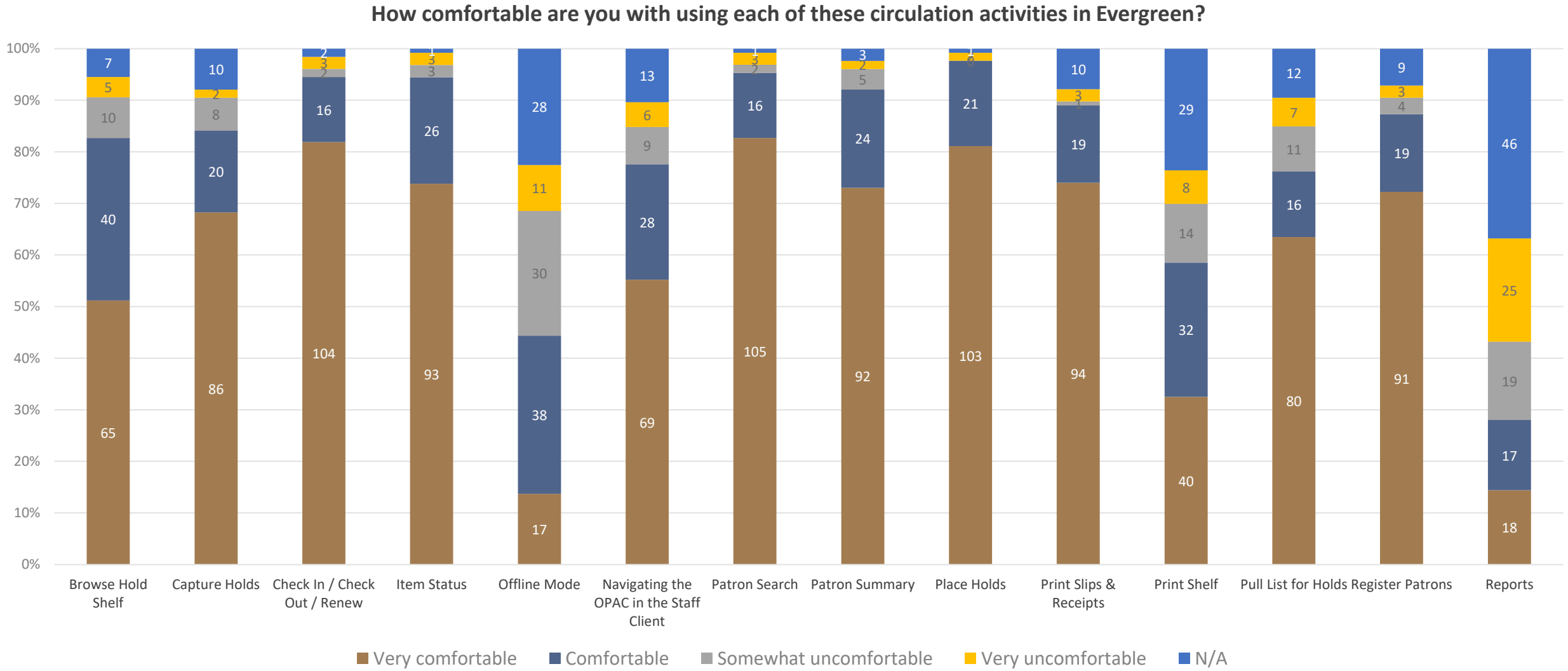
Morganton Public Library

Valdese Public Library

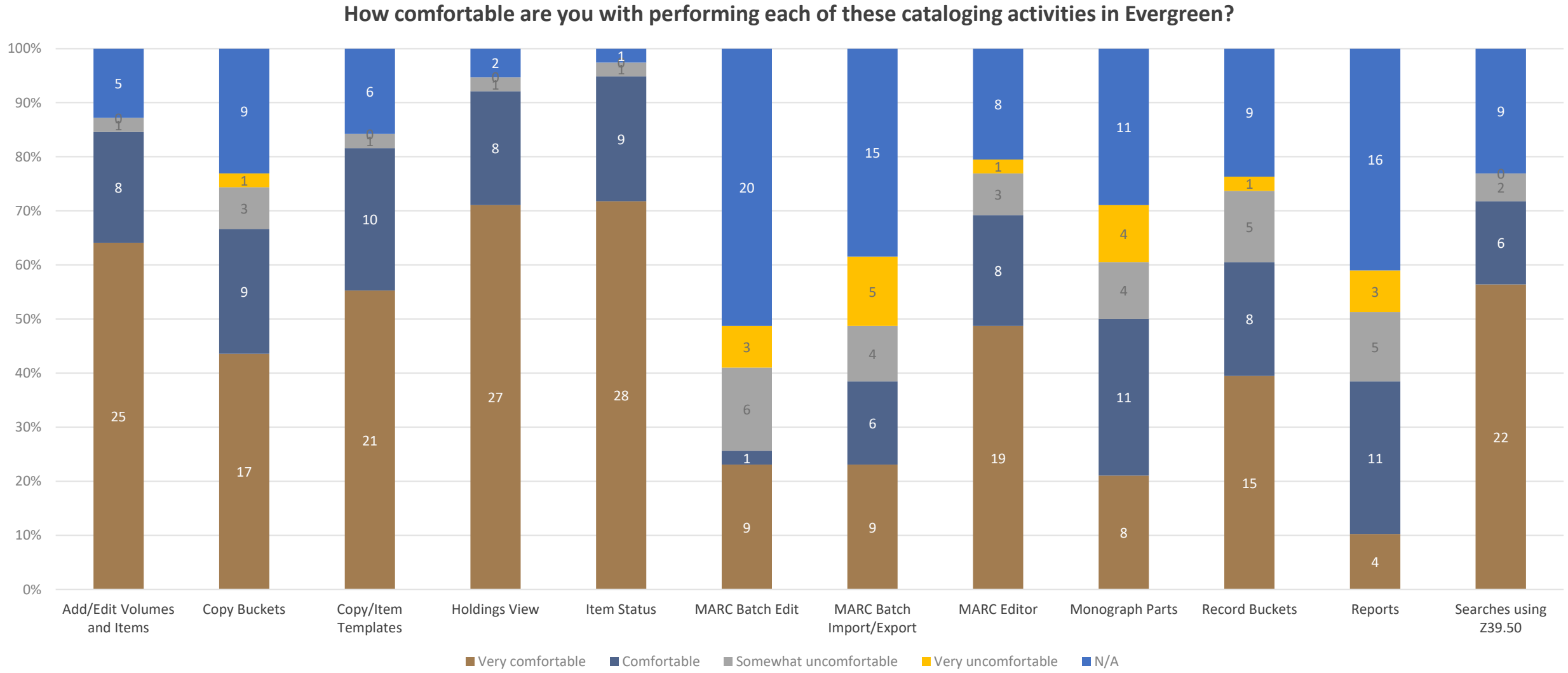
C.B. Hildebrand Public Library

Annual Staff Survey

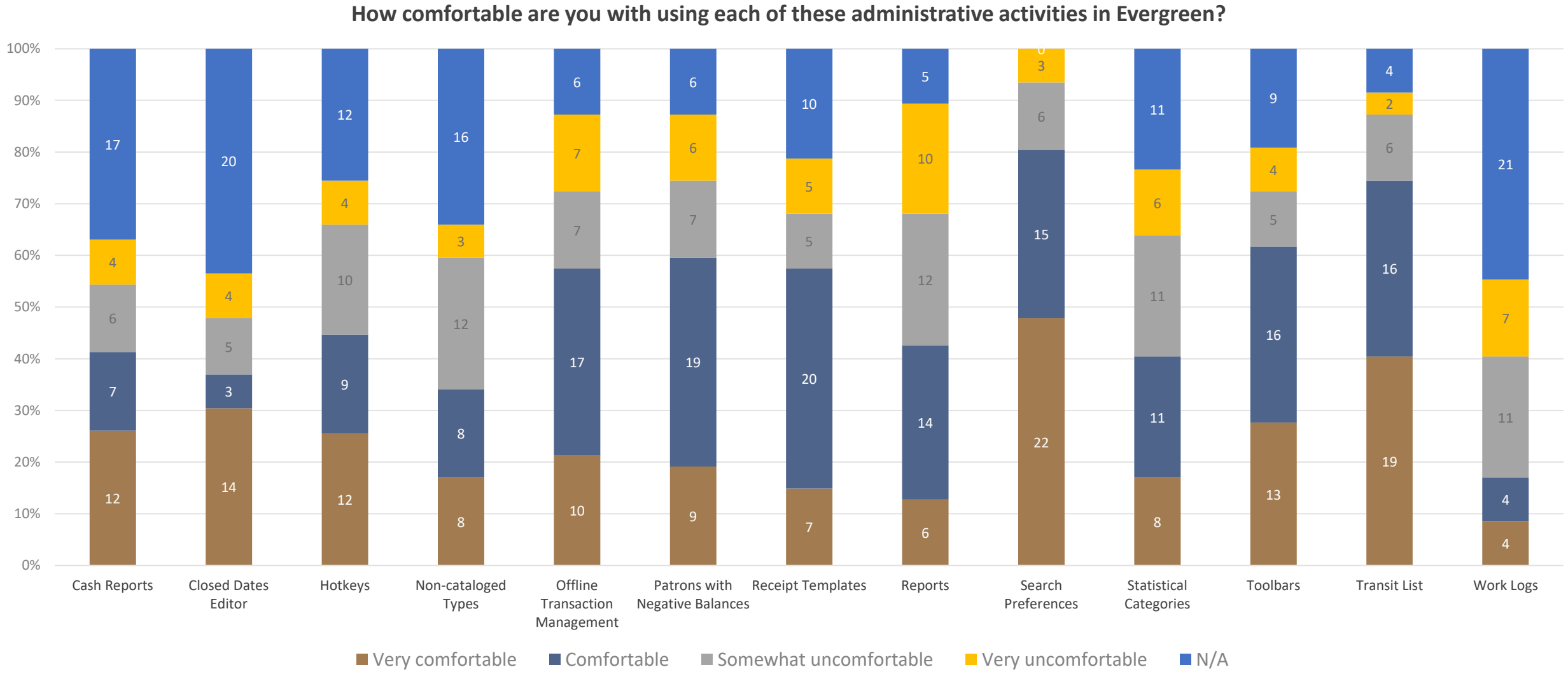
Annual Staff Survey



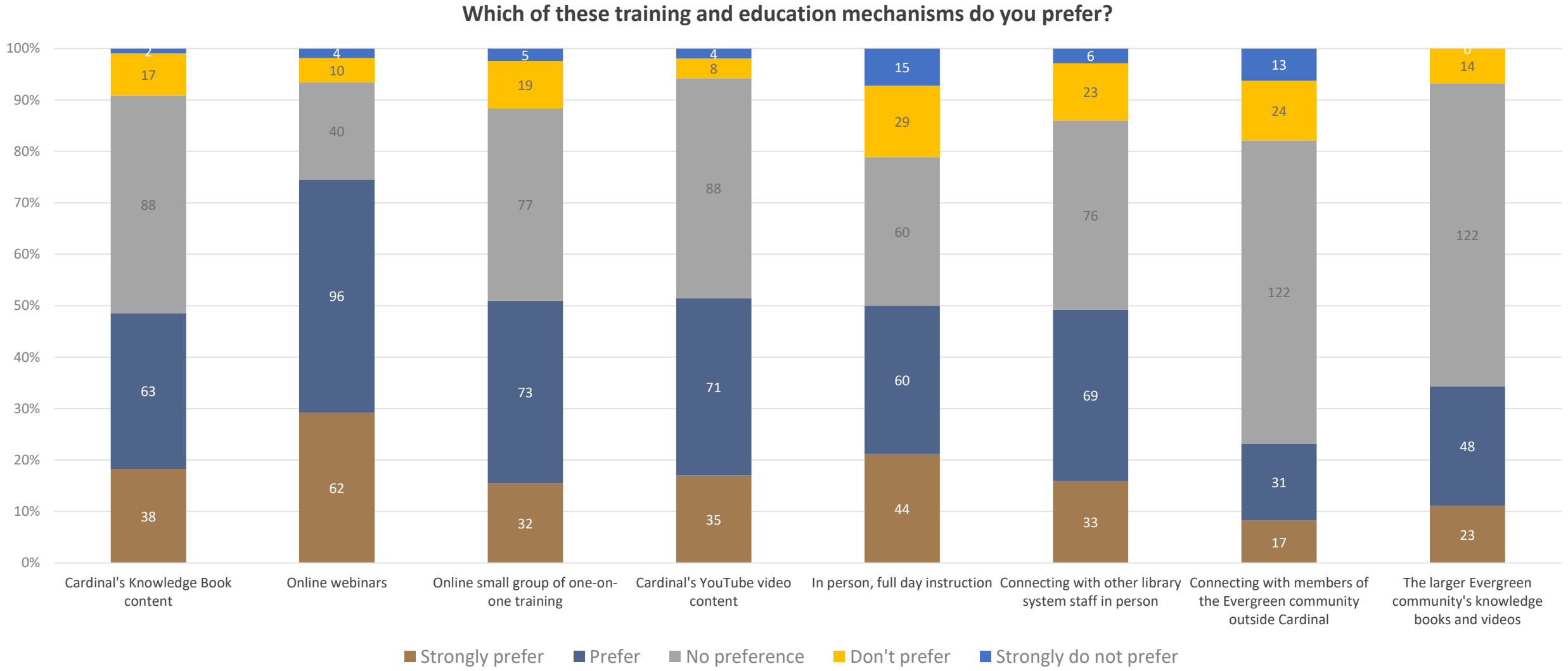
Annual Staff Survey



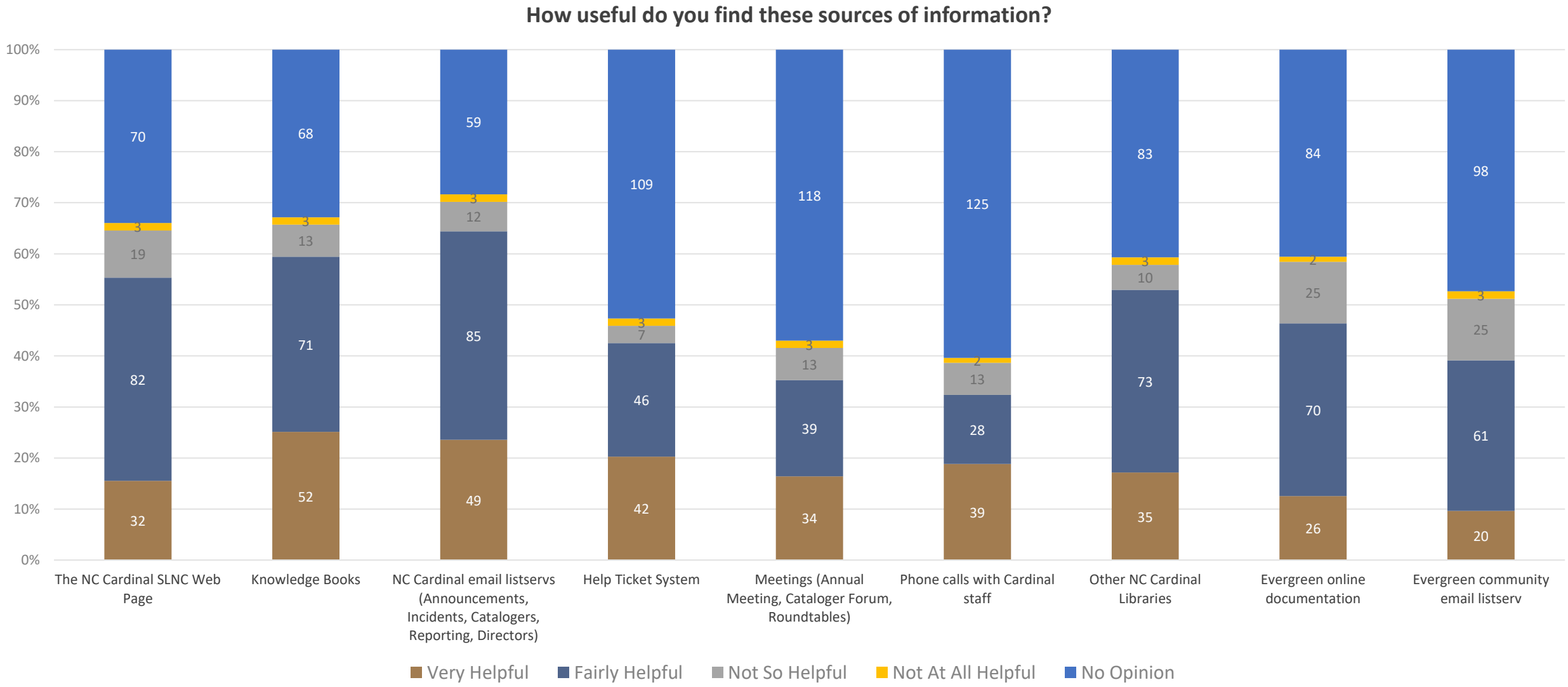
Annual Staff Survey



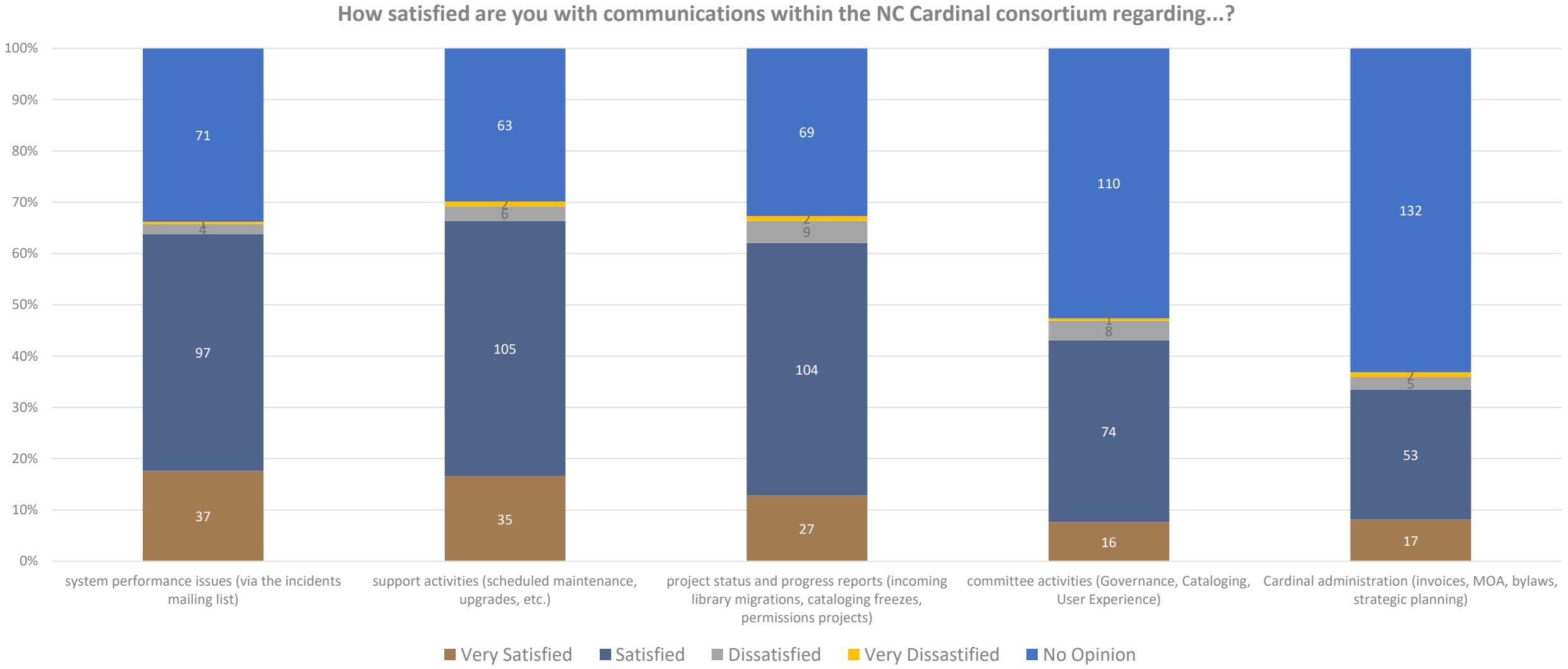
Annual Staff Survey



Annual Staff Survey



Annual Staff Survey



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!