

NC Cardinal

11th Annual Report: FY 2022-2023



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.

Agenda:

Annual Report

Break

Discussion Activity

Lunch & Governance Vote

Discussion Activity

Annual Report Outline

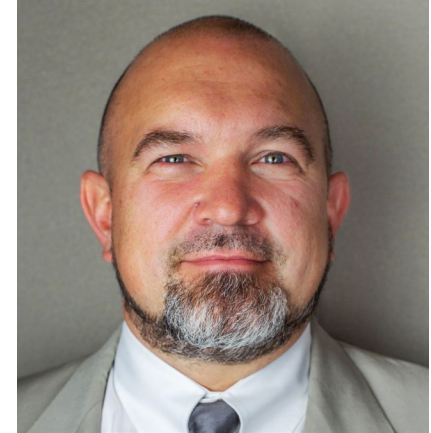
- Annual Statistics
- Resource Sharing
- Student Access Project
- Project Activities
- Committee Work
- Library Migrations
- Staff Survey
- Support Activity
- Projects for the Year Ahead

The Cardinal Team



Courtney Brown
Systems Librarian

Benjamin Murphy
Program Manager



Will Szwagiel
Project Manager

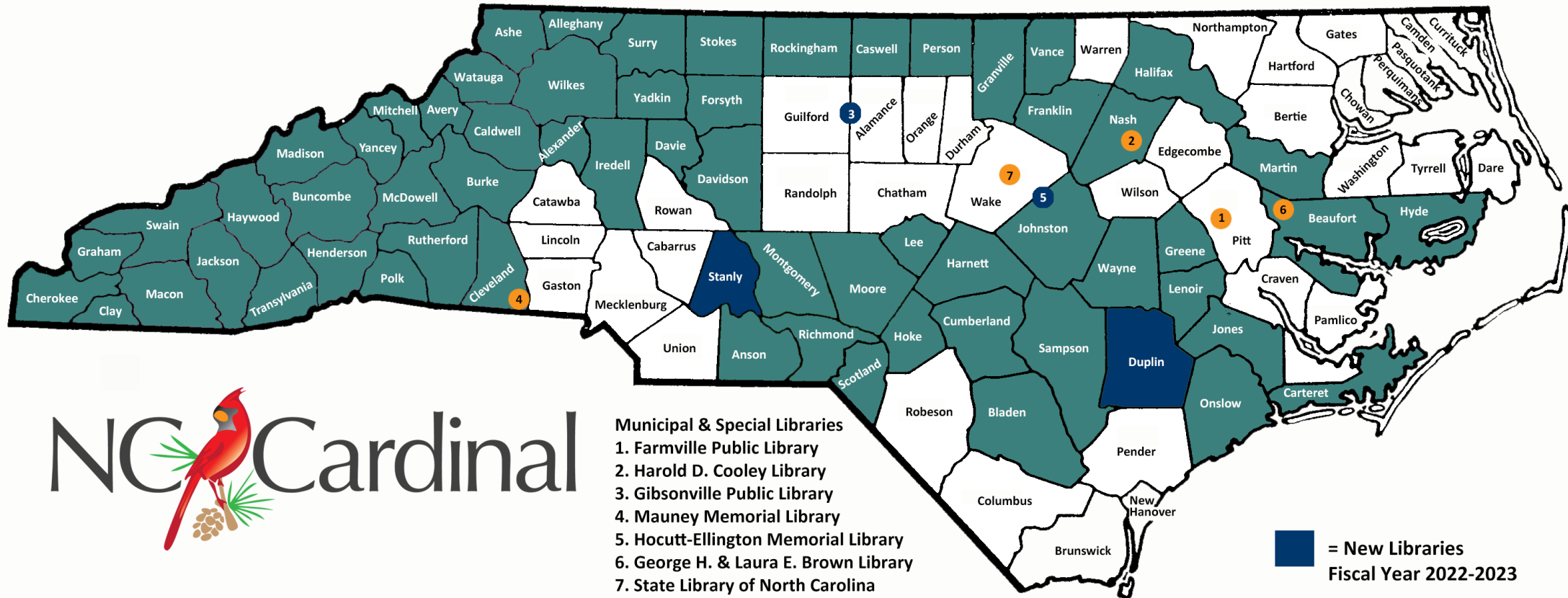


Llewellyn Marshall
Application
Administrator /
Developer

Samantha O'Connor
Training Specialist



NC Cardinal in 2022-2023



61 counties, 4 municipalities, 7 Special Libraries
210 branches

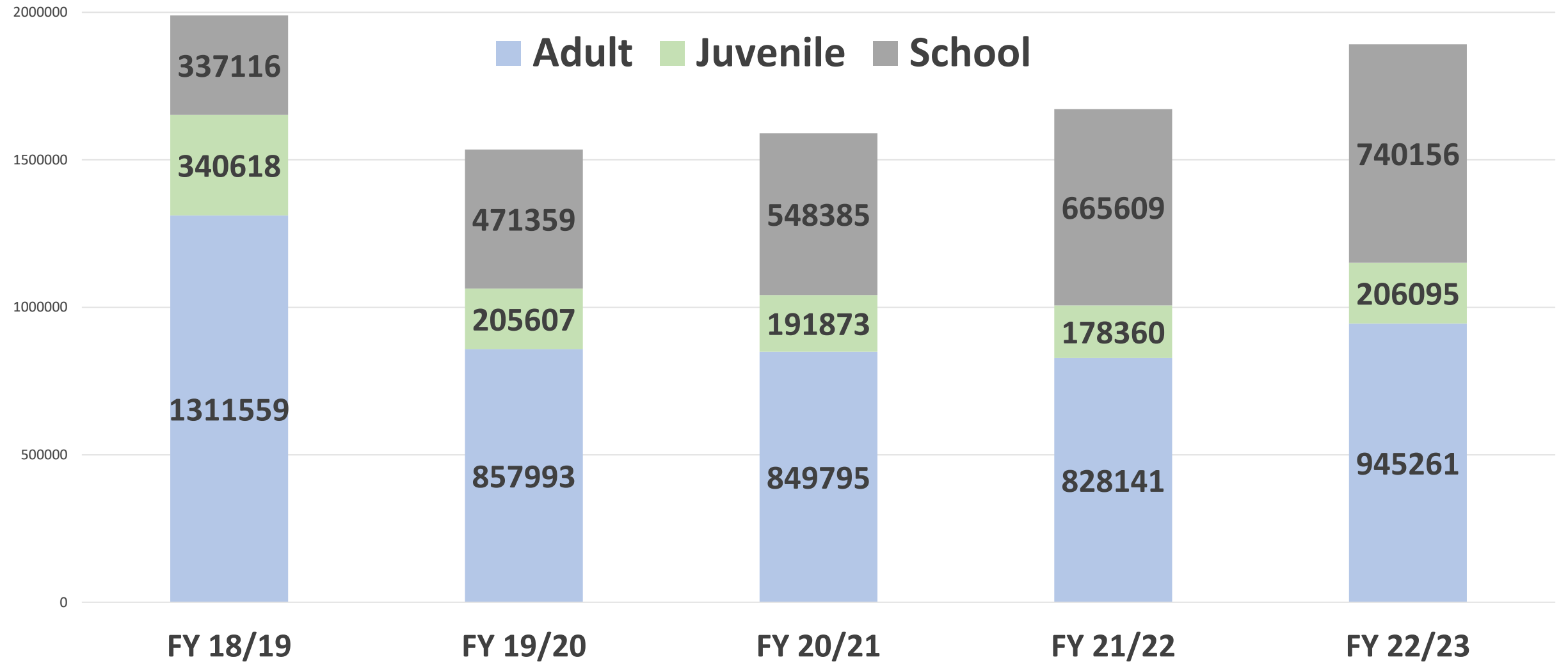


63 counties, 6 municipalities, 7 Special Libraries
223 branches

Annual Statistics

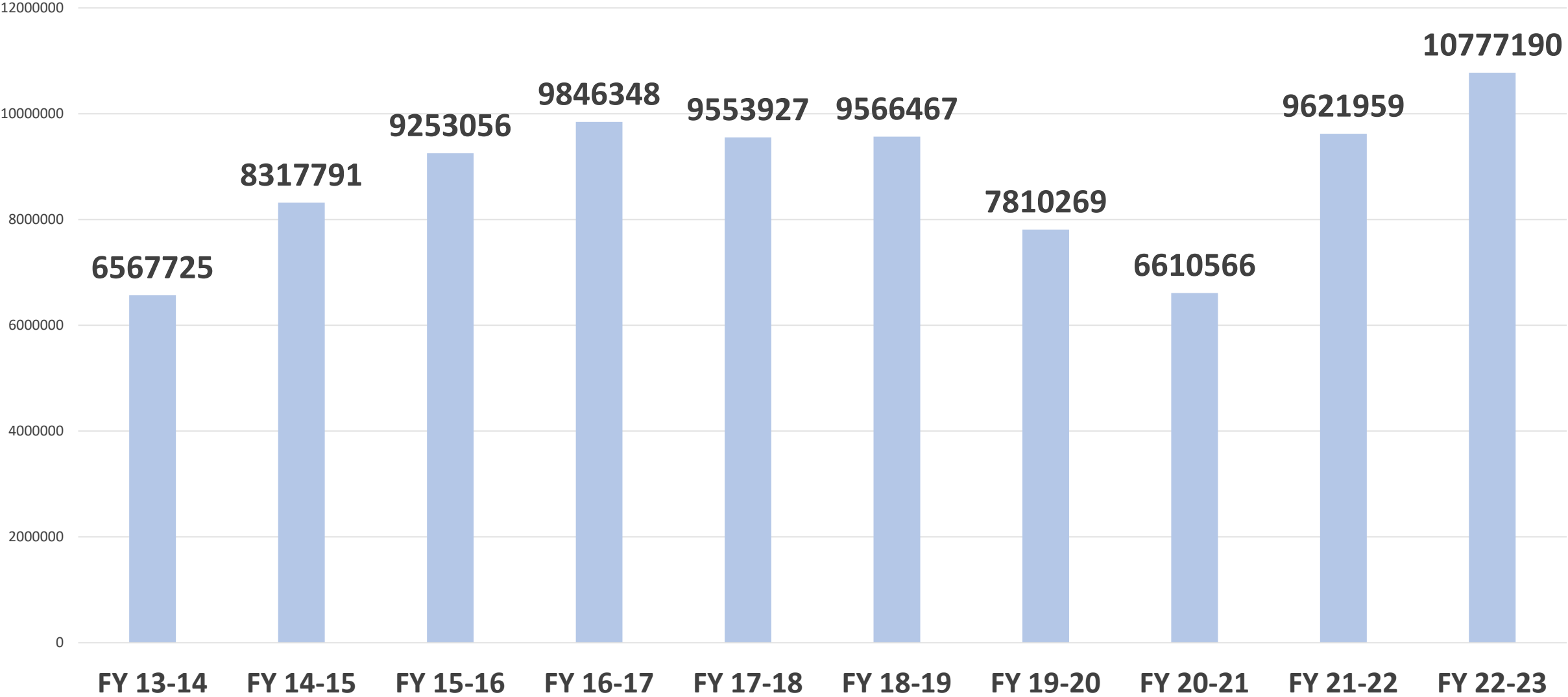


Active User Accounts: Last Five Years

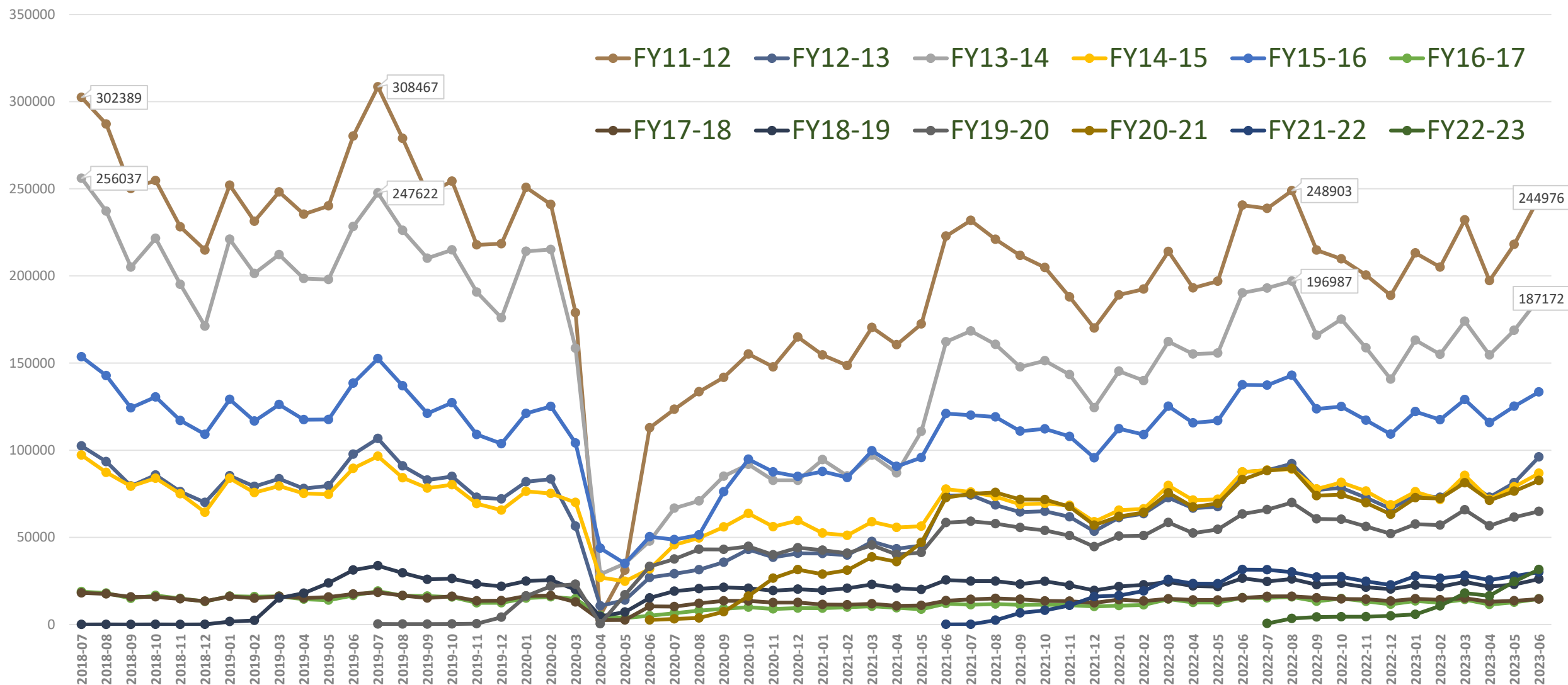




Total Circulations



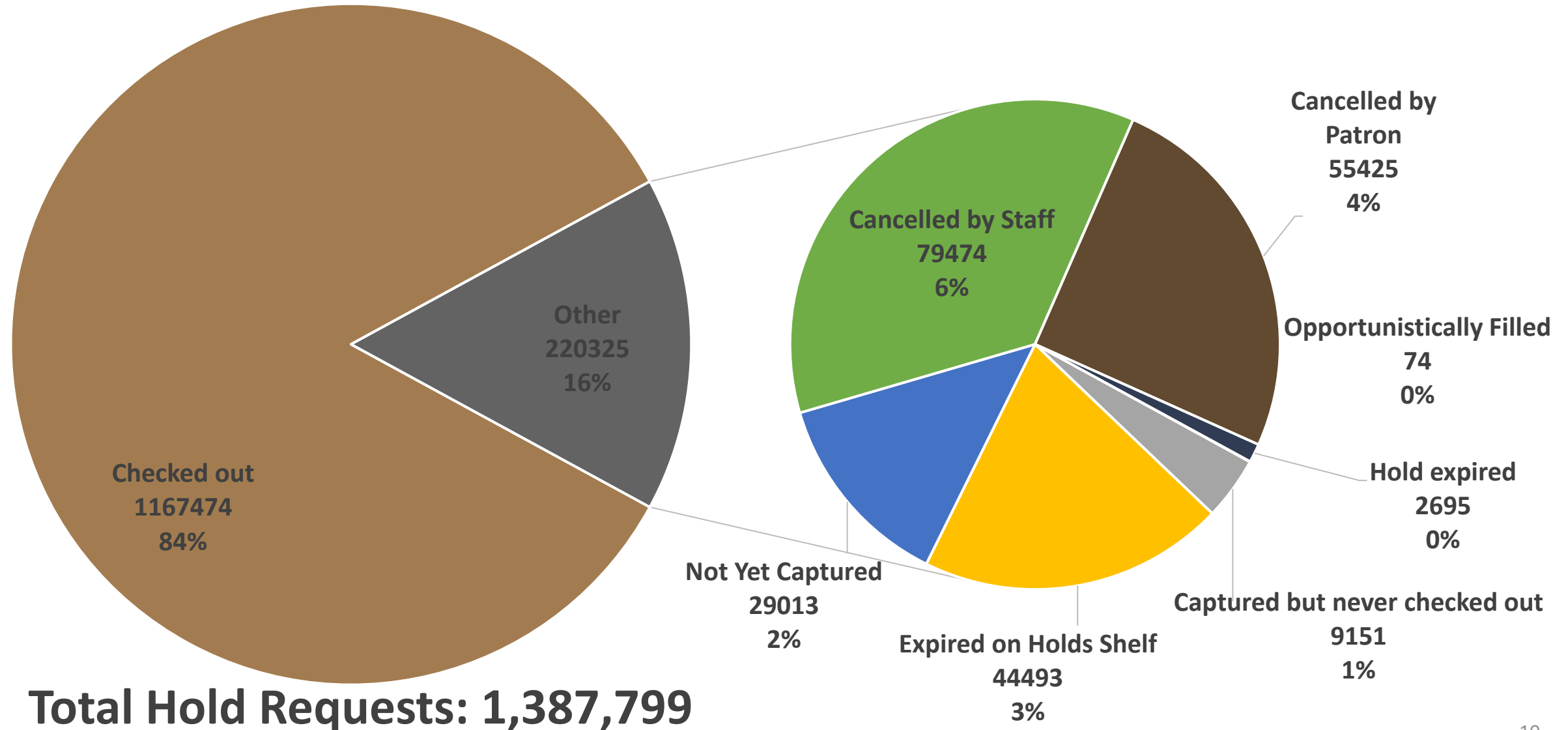
Circulation per Year Joined



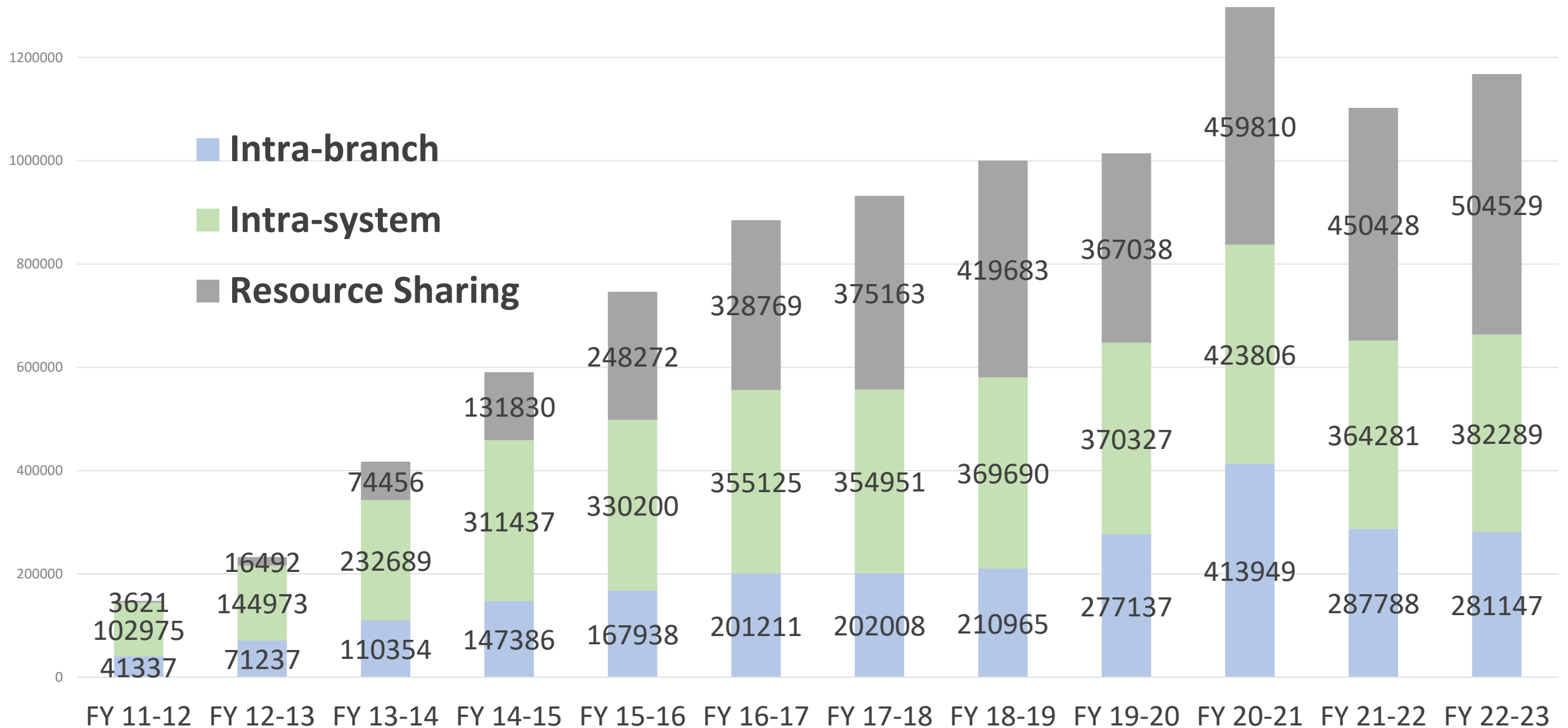
Hold Requests and Resource Sharing



Outcome of Hold Requests

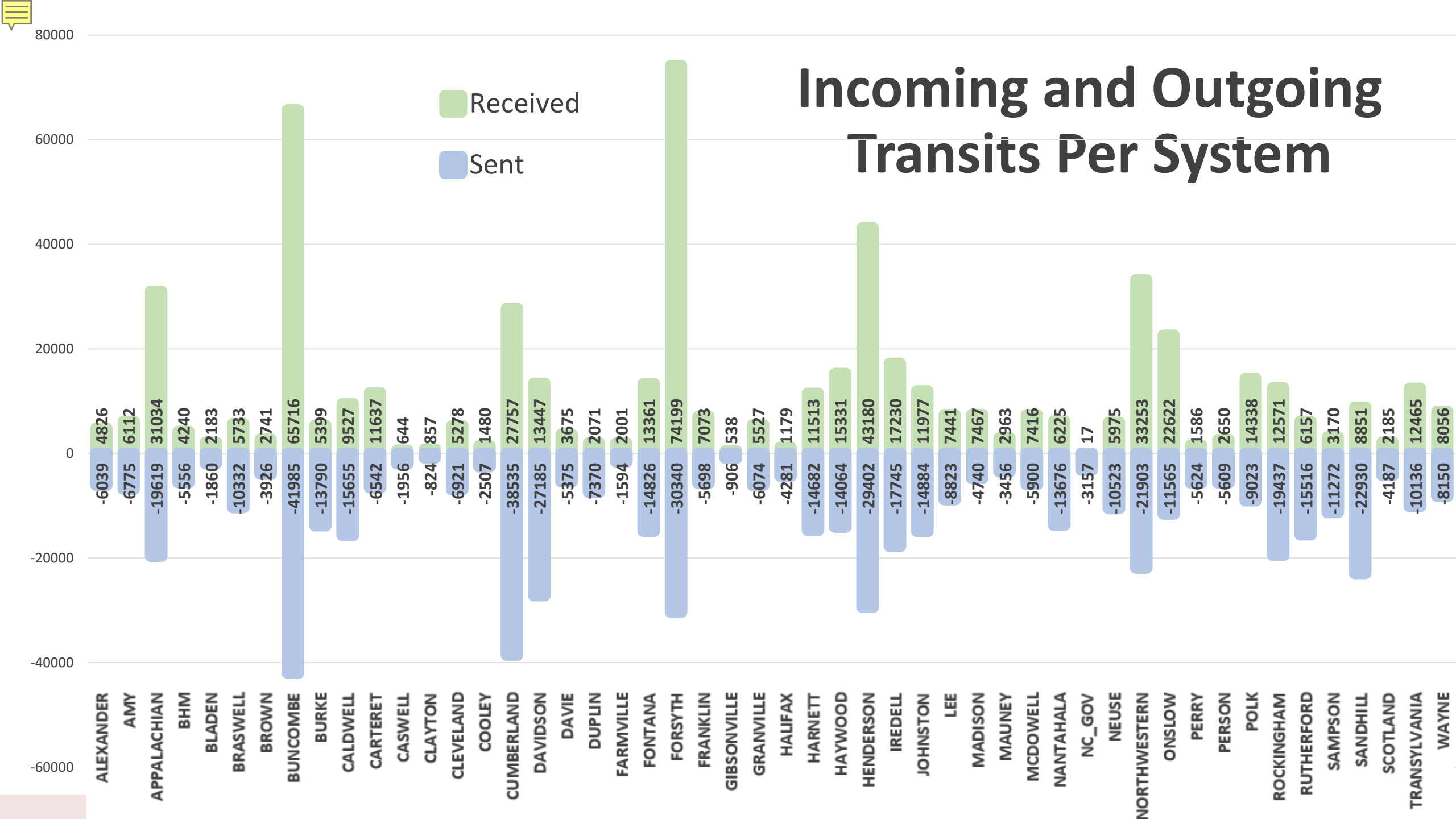


Source of Fulfilled Holds





Incoming and Outgoing Transits Per System



Student Access





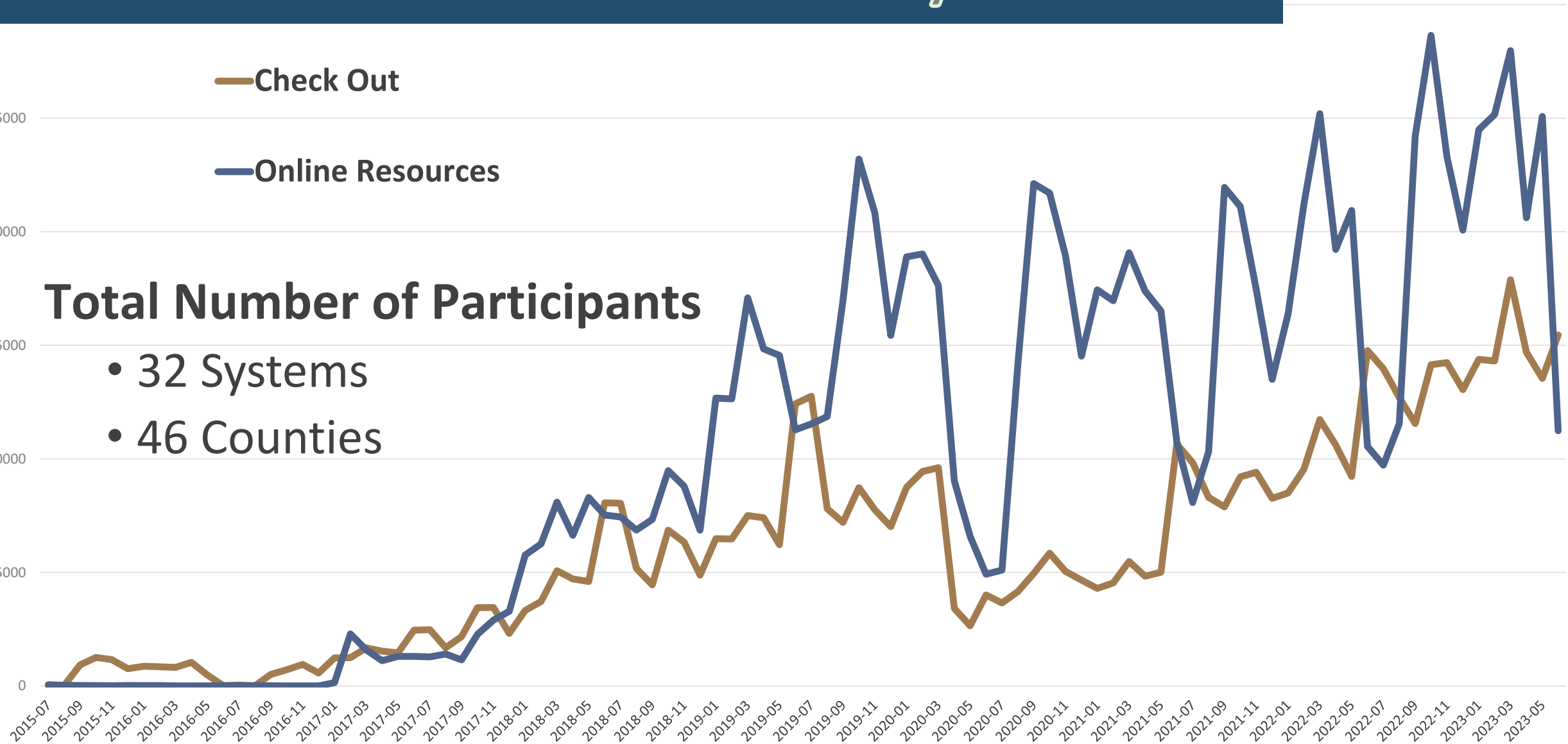
Student Access Activity

— Check Out

— Online Resources

Total Number of Participants

- 32 Systems
- 46 Counties

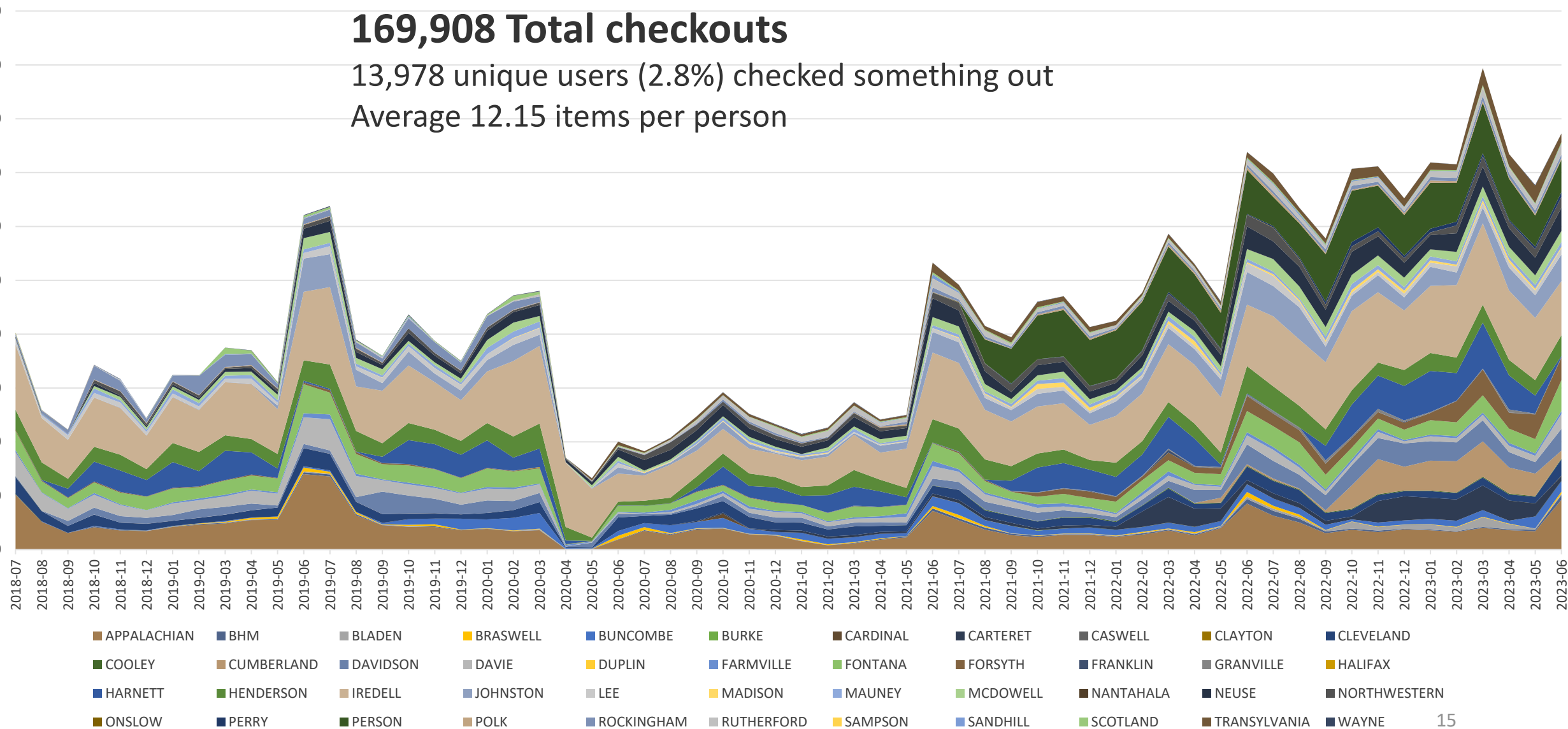


Student Access Circulations

169,908 Total checkouts

13,978 unique users (2.8%) checked something out

Average 12.15 items per person

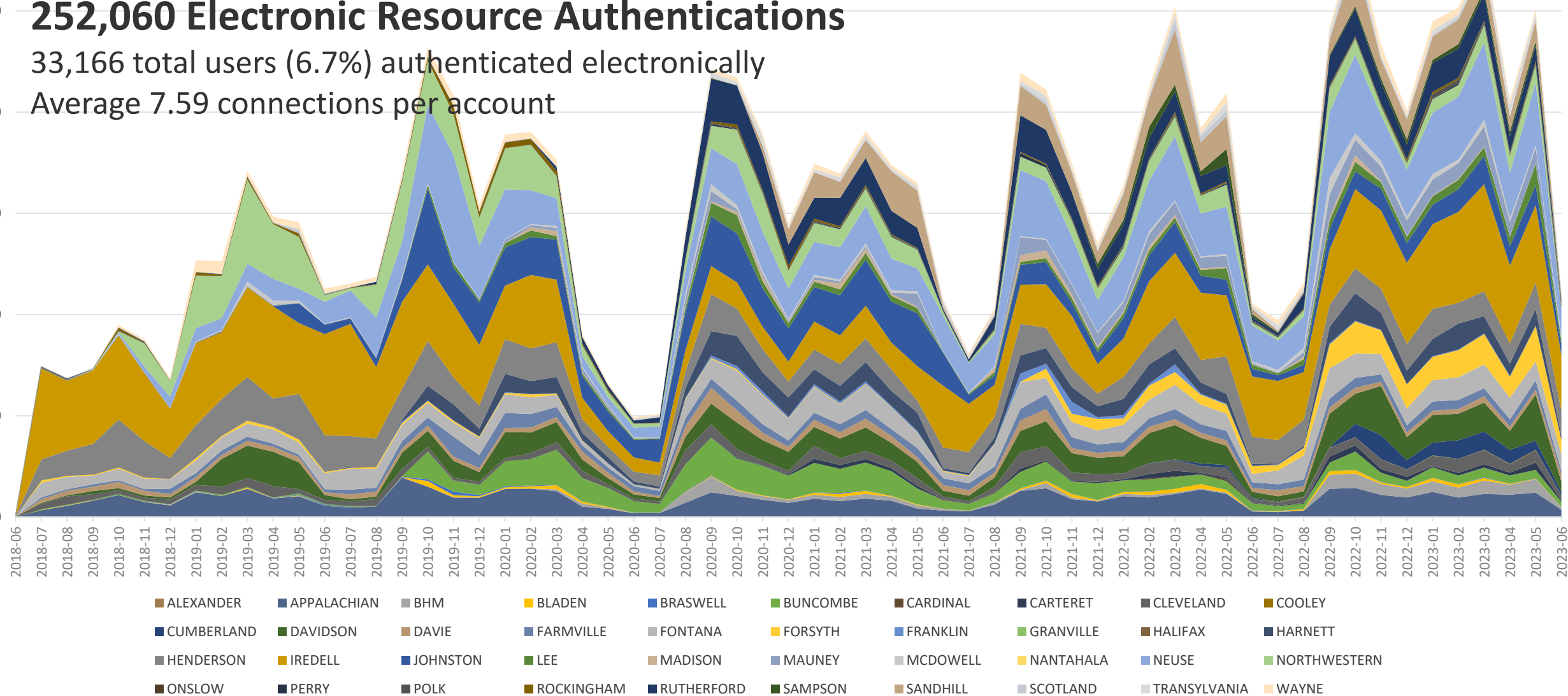


Student Access Authentications

252,060 Electronic Resource Authentications

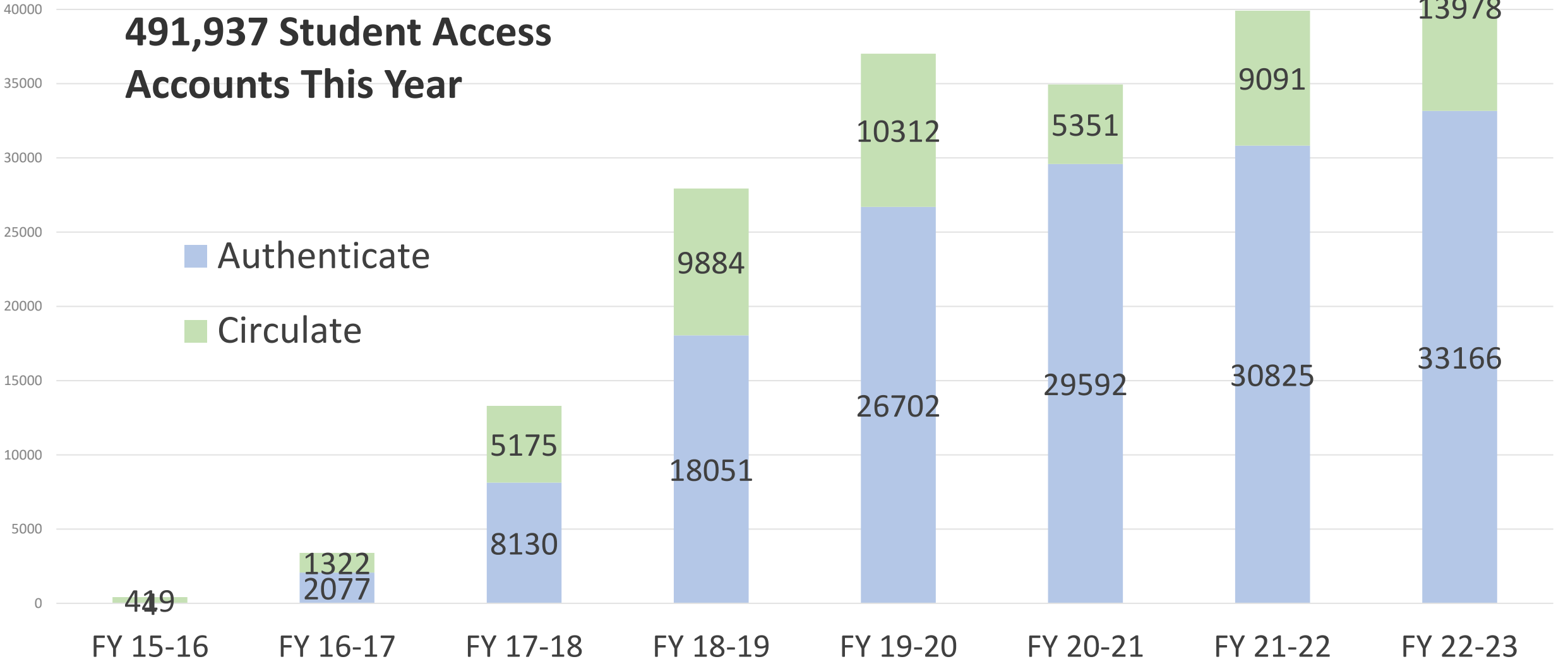
33,166 total users (6.7%) authenticated electronically

Average 7.59 connections per account





Student Access Distinct Users

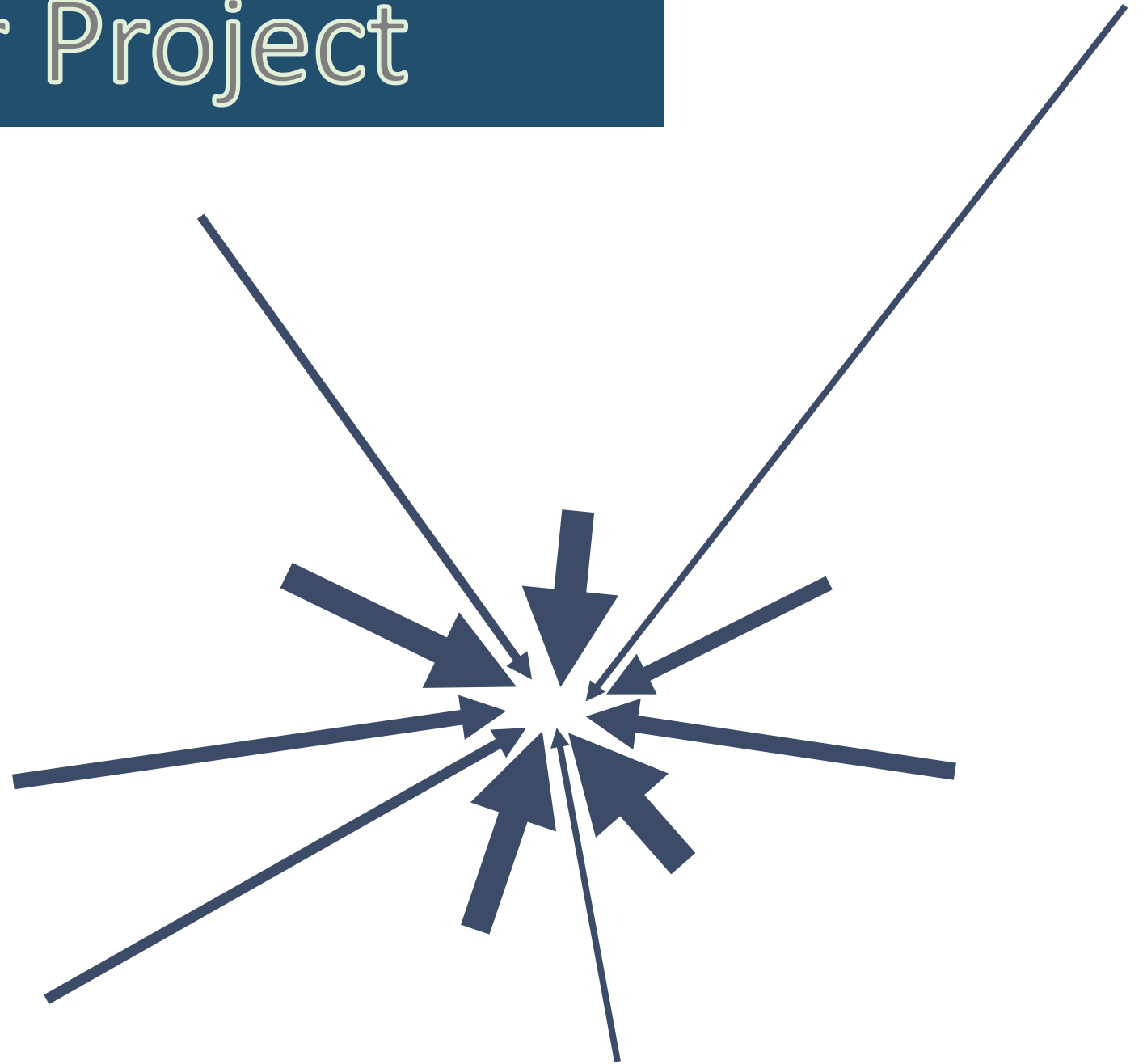




Projects & Activities

Holds Targeter Project

- Proximity adjustments for FedEx Surcharges
- Add Bing to geolocation services
- Use hold reset information in the hold targeter
- Geolocation hold targeter patch ready for production



OPAC Bucket View

bks 2 read

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27
---	---	---	---	---	---	---	---	---	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----



American mermaid : a novel by Langbein, Julia



Android smartphones by DiMarzio, J. F.



Dementia prevention : using your head to save your brain by Clionsky, Emily



Hang the moon : a novel by Walls, Jeannette



Honey, baby, mine : a mother and daughter talk life, death, love (and banana pudding) by Dern, Laura



How medicine works and when it doesn't : learning who to trust to get and stay healthy by Wilson, F. Perry



More than I imagined : what a Black man discovered about the White mother he never knew by Blake, John K.

Display any publicly visible bib record list/bucket in the OPAC.

Automatically **paginates** the list so it doesn't overwhelm the server.

Default Home OU



Request a Library Card


Home Library	<input type="text" value="Louisburg - Main Branch"/>
First Name ★	<input type="text"/>
Middle Name	<input type="text"/>
Last Name ★	<input type="text"/>
Preferred First Name	<input type="text"/>

The default org unit that's selected on the self-registration form will cause an error when submitted.


Now staff can define a default org unit that will be automatically selected instead.

CSV List Bug

<input type="checkbox"/>		Vigil Harbor	Glass, Julia, 1956-	F GLA	06/18/2022	07/02/2022	06/22/2022	0020513255164
<input type="checkbox"/>		Let's not do that again : a novel	Ginder, Grant,	F GIN	06/18/2022	07/02/2022	06/30/2022	0020513243319
<input type="checkbox"/>		Things they lost : a novel	Oduor, Okwiri,					





 Download CSV

Circulation History CSV download fails with large number of circulations 🐛

Bug #1736565 reported by  Chris Sharp on 2017-12-03

This bug affects 12 people. Does this bug affect you? 🐛

🔥 58

Affects	Status	Importance	Assigned to	Milestone
▶  Evergreen 🐛	Confirmed 🐛	Medium	Unassigned 🐛	
▶  3.10	Confirmed 🐛	Undecided	Unassigned 🐛	
▶  3.11	Confirmed 🐛	Undecided	Unassigned 🐛	
▶  3.9	Won't Fix 🐛	Undecided	Unassigned 🐛	


➕ Also affects project ? ➕ Also affects distribution/package

Bug Description


When a user downloads their circulation history as a CSV file and the number of history items is too large, CSV creation fails and the user is presented with an Internal Server Error. "Too large" in this case is 998 items - not sure where the breakpoint is.

Evergreen 2.12.4
OpenSRF 2.5.2
Ubuntu 14.04 LTS
PostgreSQL 9.5

Google Analytics 4

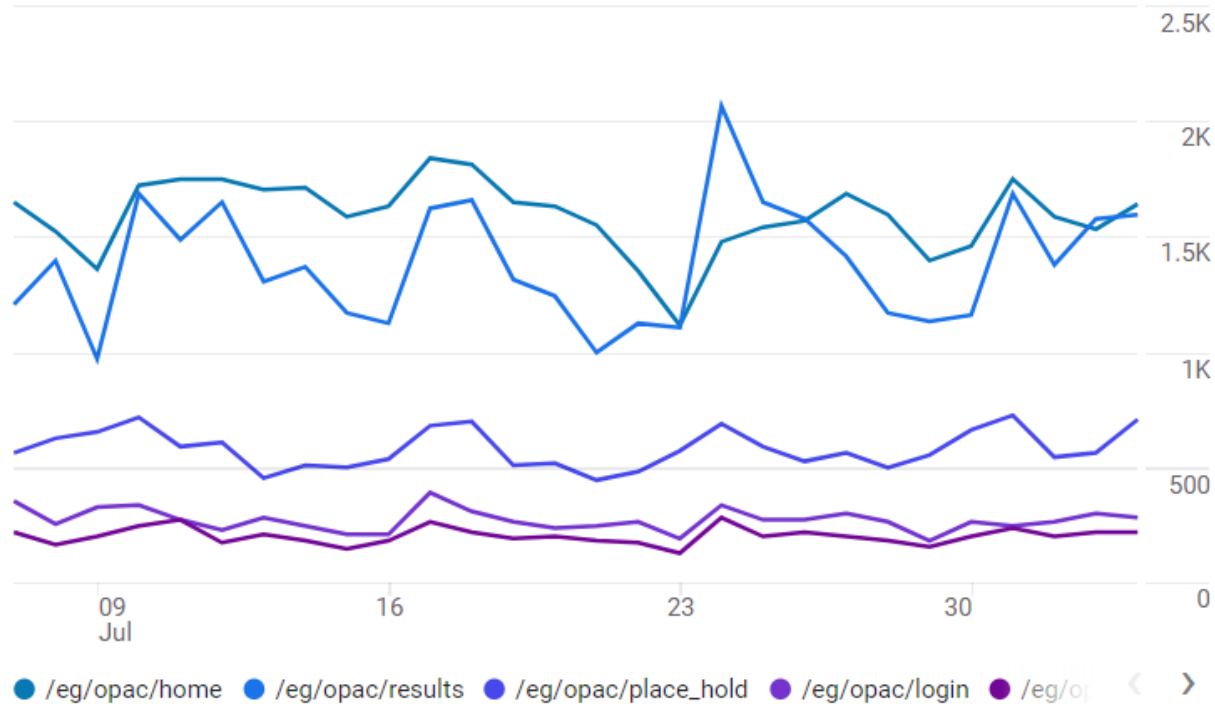
Pages and screens: Page path and screen class 



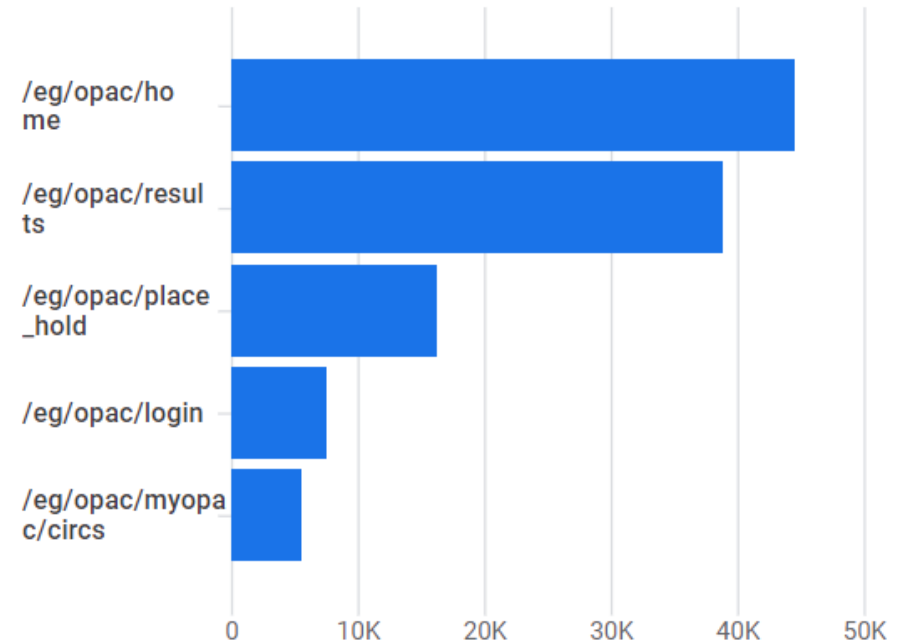
Hostname exactly matches ... 

Hostname exactly matches 'forsyth.nccardinal.org'

Views by Page path and screen class over time



Views by Page path and screen class



Search...

Rows per page: 10 Go to: 1 1-10 of 9708



Cataloging Committee Members

- Jessica Efron – NC Govt
- Jennifer Jackson - Henderson
- Cory Ledford - Caldwell
- Kathryn Nesbit – Forsyth
- Tamara Baltazar – 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/					orous 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{subitlep}, $marc{author} ? $marc{author} : '',
    $marc{audioformat}, $marc{videoformat}, $marc{pubyear}, $marc{normalizedisbns}
);
```

Item Tags/Digital Bookplates

Project Details

- Unlike Item Notes, Item Tags are searchable in the catalog
- Created standardized form of Item Tags called Digital Bookplates
- Intended for donations and memorial items so patrons can search for materials in the catalog by the name of the person for whom a particular item was donated
- Libraries request via ticket to have this search functionality turned on

The screenshot shows a library catalog search interface. At the top, there are tabs for 'Keyword Search', 'Numeric Search', 'MARC Search', 'Browse', and 'Shelf Browse'. Below these, there is a search bar with a dropdown menu for 'All Formats' and another dropdown menu for 'Keyword'. The 'Keyword' dropdown is open, showing options: 'Keyword', 'Title', 'Journal Title', 'Author', 'Subject', 'Series', and 'Digital Bookplate'. The 'Digital Bookplate' option is highlighted. To the right of the dropdowns, there is a 'Contains' dropdown and a 'Query...' input field. Below the search bar, there are checkboxes for 'Group Formats/Editions', 'Results from All Libraries', and 'Exclude Electronic Resources'. The 'Sort by Relevance' button is also visible.

Call Number / Copy Notes	Barcode
F Tolkien (Text)	12345678910
Digital Bookplate: Donated by John Doe in Memory of Jane Doe.	



Homosaurus Thesaurus

Project Details

- In an effort to provide a more inclusive experience for library users and staff, the Cataloging Committee investigated the creation of new, more inclusive cataloging guidelines
- To that end, it was decided to implement Marcive's new Homosaurus Thesaurus service
- Homosaurus Thesaurus offers a list of inclusive, less problematic subject and genre headings related to the LGBTQ+ community
- Through an automated process, Marcive will update older, outdated, and problematic subject and genre headings with these new headings
- The cataloging guidelines in the Knowledge Books were updated to take these new subject and genre headings into consideration



User Experience Committee 22-23

Projects for this Past Year

- Fall 2022 Upgrade to 3.9.1
- Hold Targeter testing
- Staff survey improvements
- OPAC accessibility
- Multi-Card Policy
- Regional Training
- Kenneth Odom - Rutherford (2023-2025)
- Joy Cecil-Dyrkacz - Davidson (2023-2025)
- Lisa Donaldson - Henderson County Public Library (2023-2025)
- Deborah Wadleigh - Onslow (2023-2025)
- Cheryl Middleton - Buncombe (2022-2024)
- Nastassia Debnam - Perry (2022-2024)
- Jamie Stroble - Forsyth (2022-2024)



Niche Academy Updates

Project Details

- 9 new learning modules available in NC Cardinal's Niche Academy.
- Long form tutorials include:
 - Bibliographic Cataloging
 - Acquisitions A-Z
 - SLAM training
- Short training exercises include:
 - Acquisitions
 - Circulation
 - Item Cataloging
 - Simple Reporter

The screenshot displays the NC Cardinal Niche Academy interface. At the top, the logo "NC Cardinal" is visible. Below the logo is a search bar. The main content area features a grid of six training modules, each represented by a colored square with a completion percentage and a title. The modules are:

- Acquisitions A-Z (0% Complete, 2 min)
- Acquisitions Training Exercises
- Circulation Training Exercises (66% Complete)
- Item Cataloging Training Exercises (33% Complete)
- NC Cardinal Bibliographic Cataloging Assessment
- NC Cardinal Bibliographic Cataloging Training

On the right side, there is a sidebar menu titled "Categories" with a close button (X). The menu lists the following categories:

- All tutorials
- My enrolled tutorials
- Cataloging Assessments
- Training Exercises
- Circulation Training
- Cataloging Training
- Reports Training
- SLAM Training

Cataloging Assessment Updates

Project Details

- Catalogers must pass assessments before being granted cataloging permissions.
- This year, the assessments were updated and re-formatted. They were also migrated to Niche Academy.
- 44 new Item catalogers
- 37 new Bibliographic catalogers

The screenshot displays the 'Cataloging Assessments' section of the Niche Academy interface. At the top, a green header bar contains a left-pointing arrow and the text 'Cataloging Assessments'. Below this, the main content area is divided into two columns. The left column shows two questions. The first question, 'Question 1 of 20', asks if it is an NC Cardinal Best Practice to always search the entire NC Cardinal catalog when looking for a bibliographic record, with radio button options for 'True' and 'False'. The second question, 'Question 2 of 20', asks which of the following an Item Cataloger should be able to do, with radio button options: 'Create brief records', 'Edit bibliographic records', 'Add/edit subject headings', 'Merge duplicate bibliographic records', and 'None of the above'. The right column features a sidebar with the title 'NC Cardinal Item Cataloging Assessment' and a progress indicator showing '0 of 4 Complete' with a green progress bar. Below the progress bar is an 'Overview' section with a list of assessment parts: 'Introduction', 'Item Cataloging Assessment part 1: Multiple Choice' (0% complete), 'Item Cataloging Assessment part 2: Matching Fields' (20% complete with a red notification bell), and 'Item Cataloging Assessment part 3: Evaluating Records' (0% complete). The top right of the interface includes a navigation bar with icons for home, NC Cardinal, a graduation cap, a lock, settings, help, and a user profile.

← Cataloging Assessments

NC Cardinal

NC Cardinal Item Cataloging Assessment

0 of 4 Complete

Overview

Introduction

Item Cataloging Assessment part 1: Multiple Choice

Item Cataloging Assessment part 2: Matching Fields

Item Cataloging Assessment part 3: Evaluating Records



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

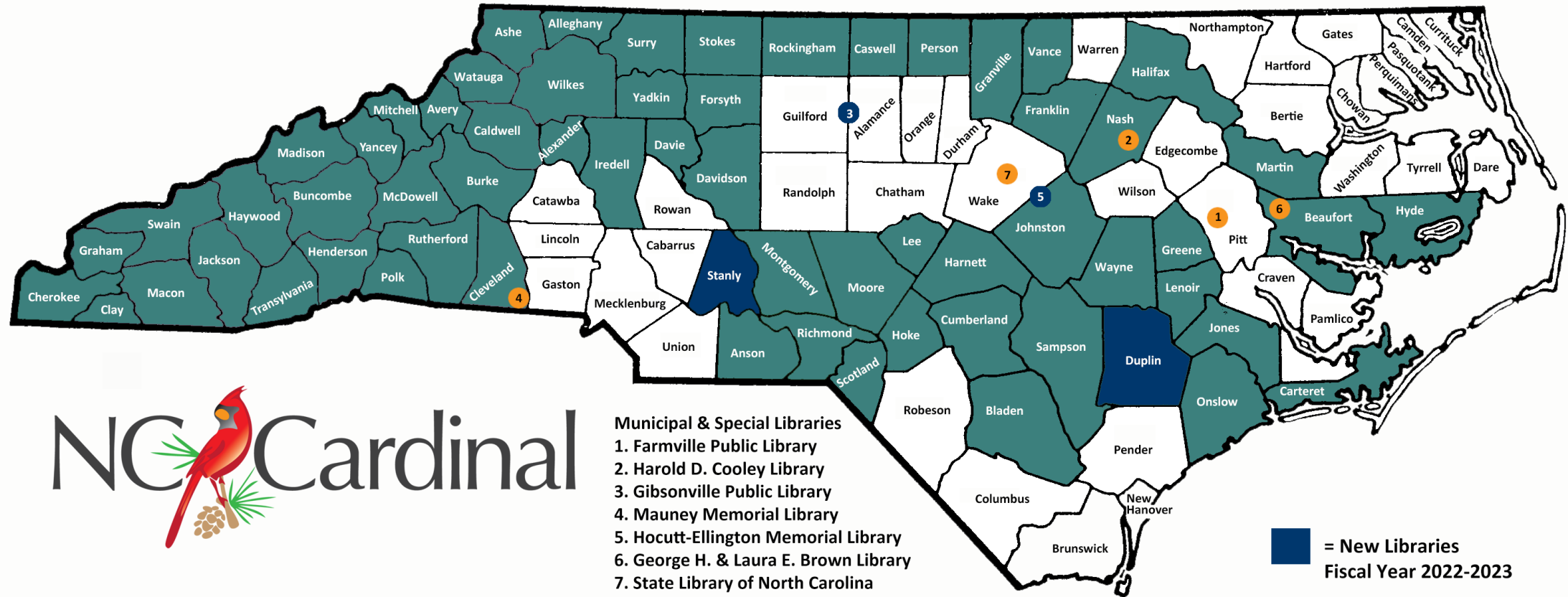
Large number of settings,
broken down into categories

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



New Cardinal Libraries

Library Migration in 22-23

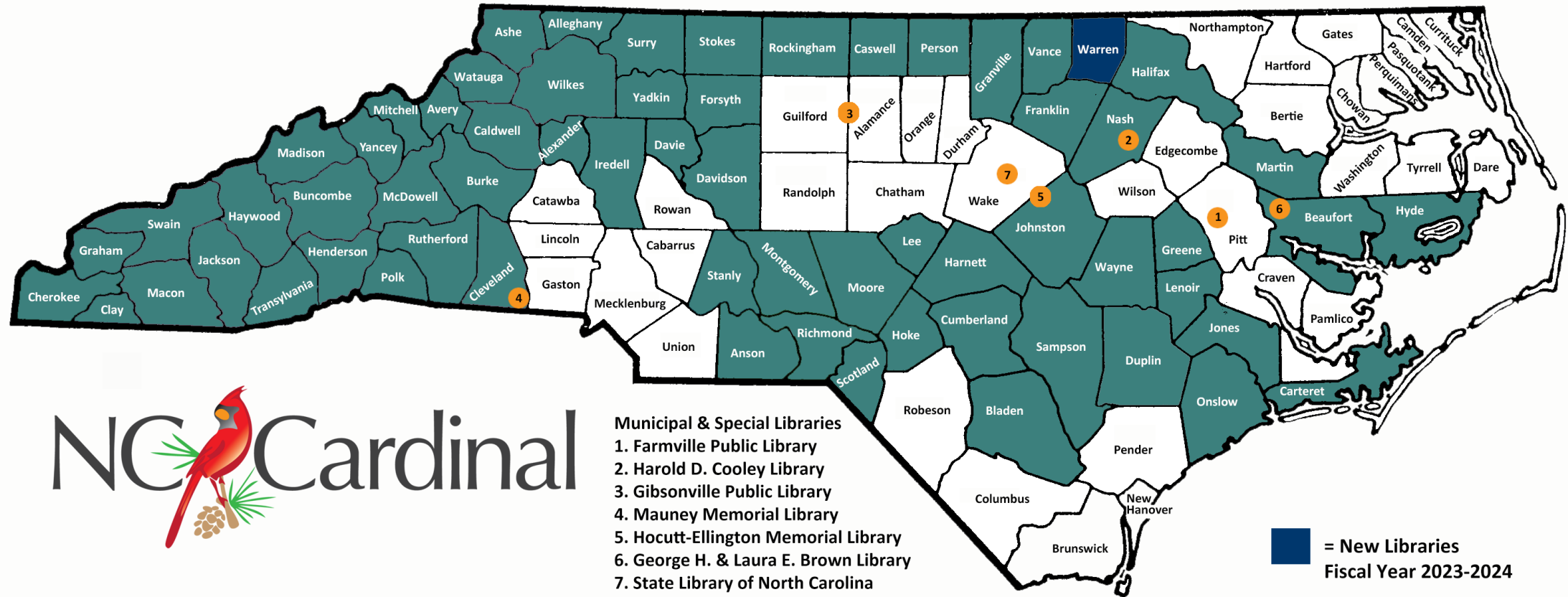


63 counties, 6 municipalities, 7 Special Libraries
224 branches

Warren County Memorial Library



Library Migration in 23-24



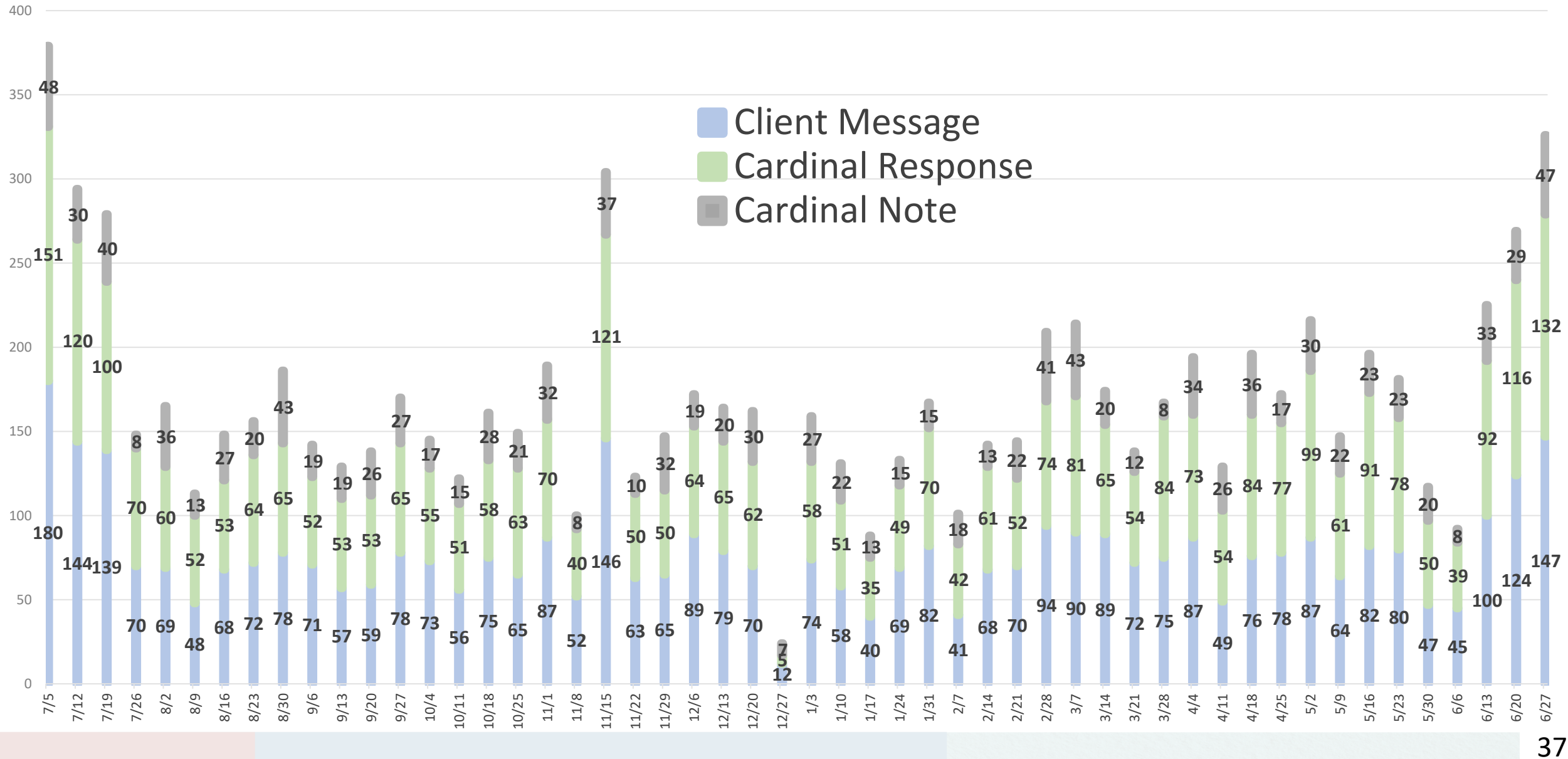
64 counties, 6 municipalities, 7 Special Libraries
225 branches



Cardinal Support Activity

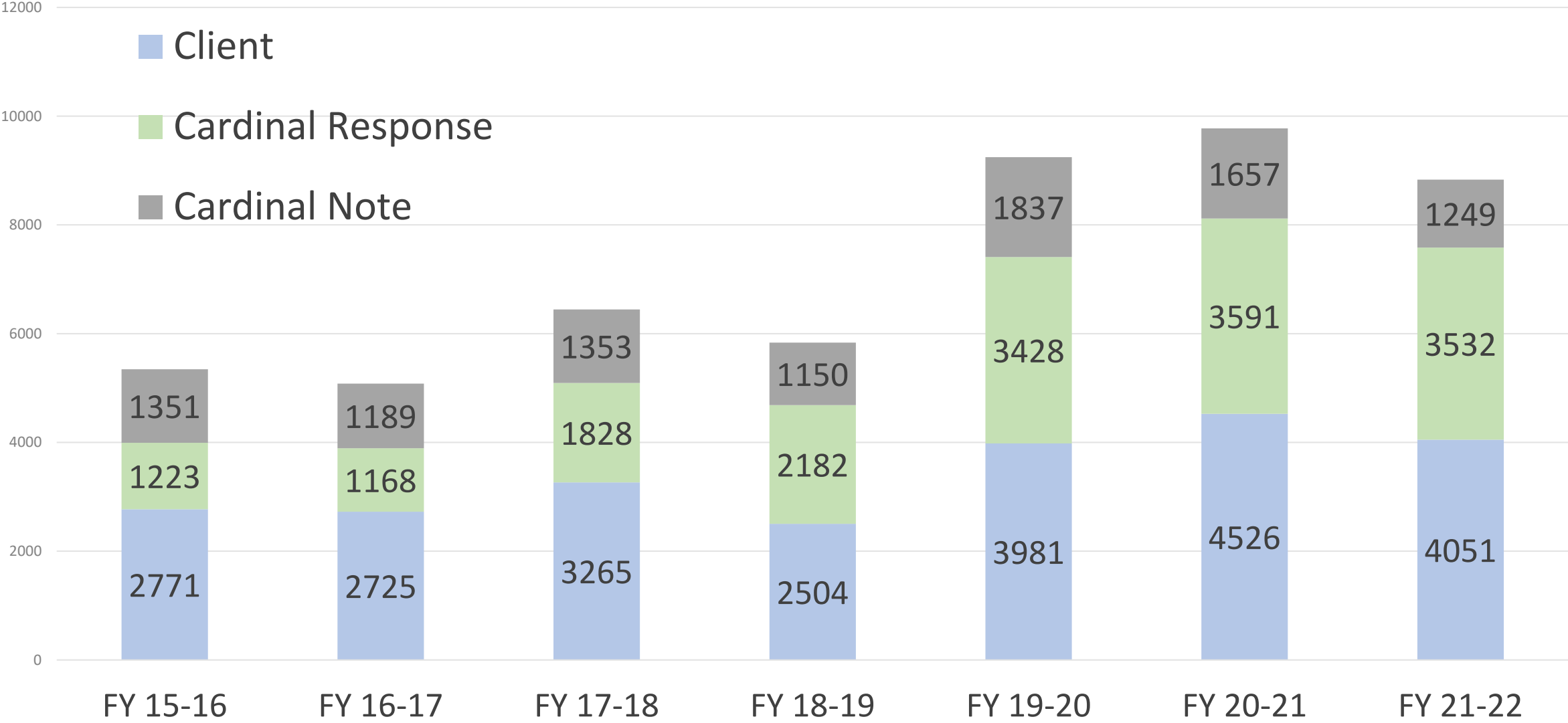


Cardinal Support Activity 21-22





Cardinal Support Traffic

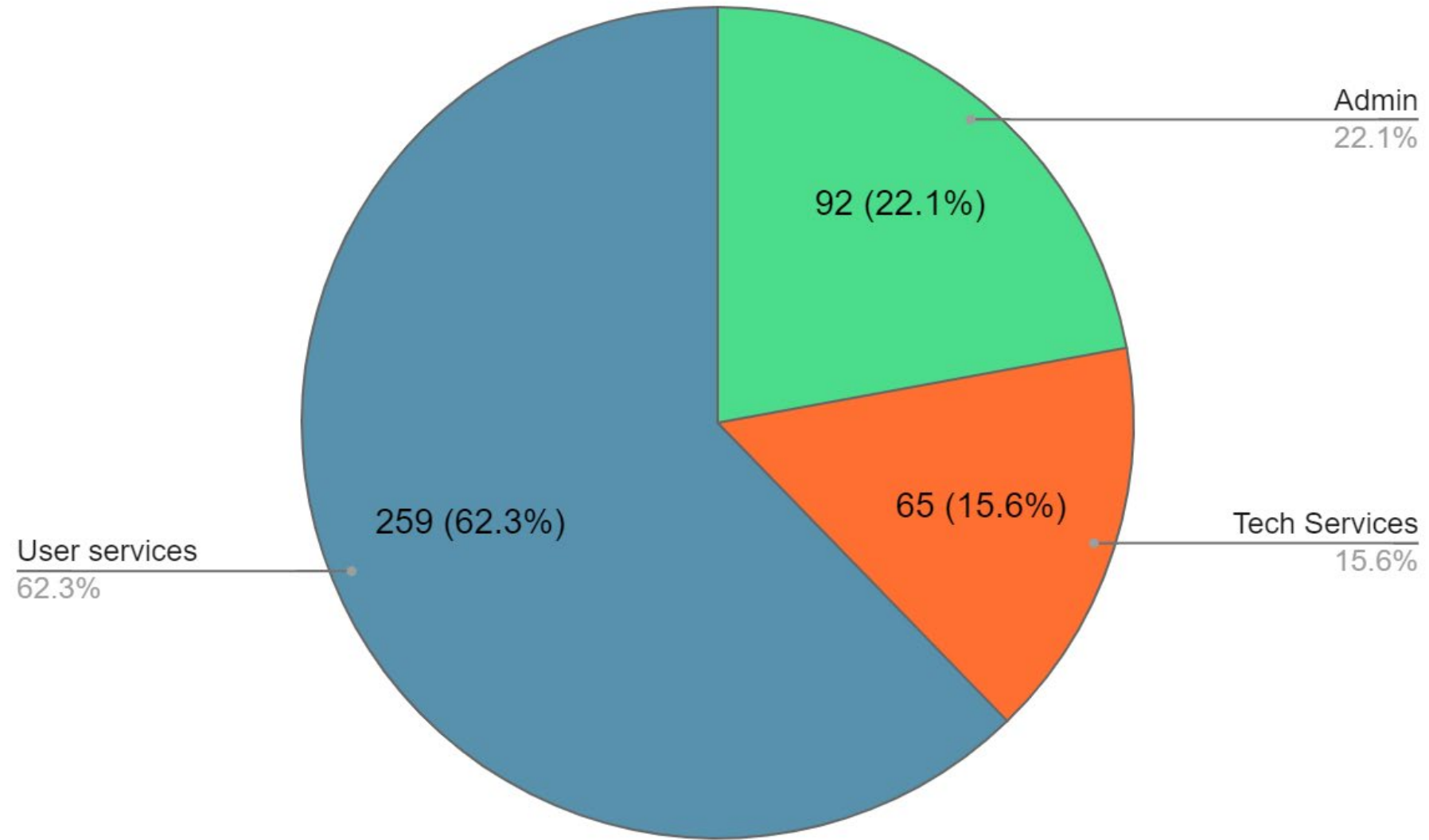


Staff Survey





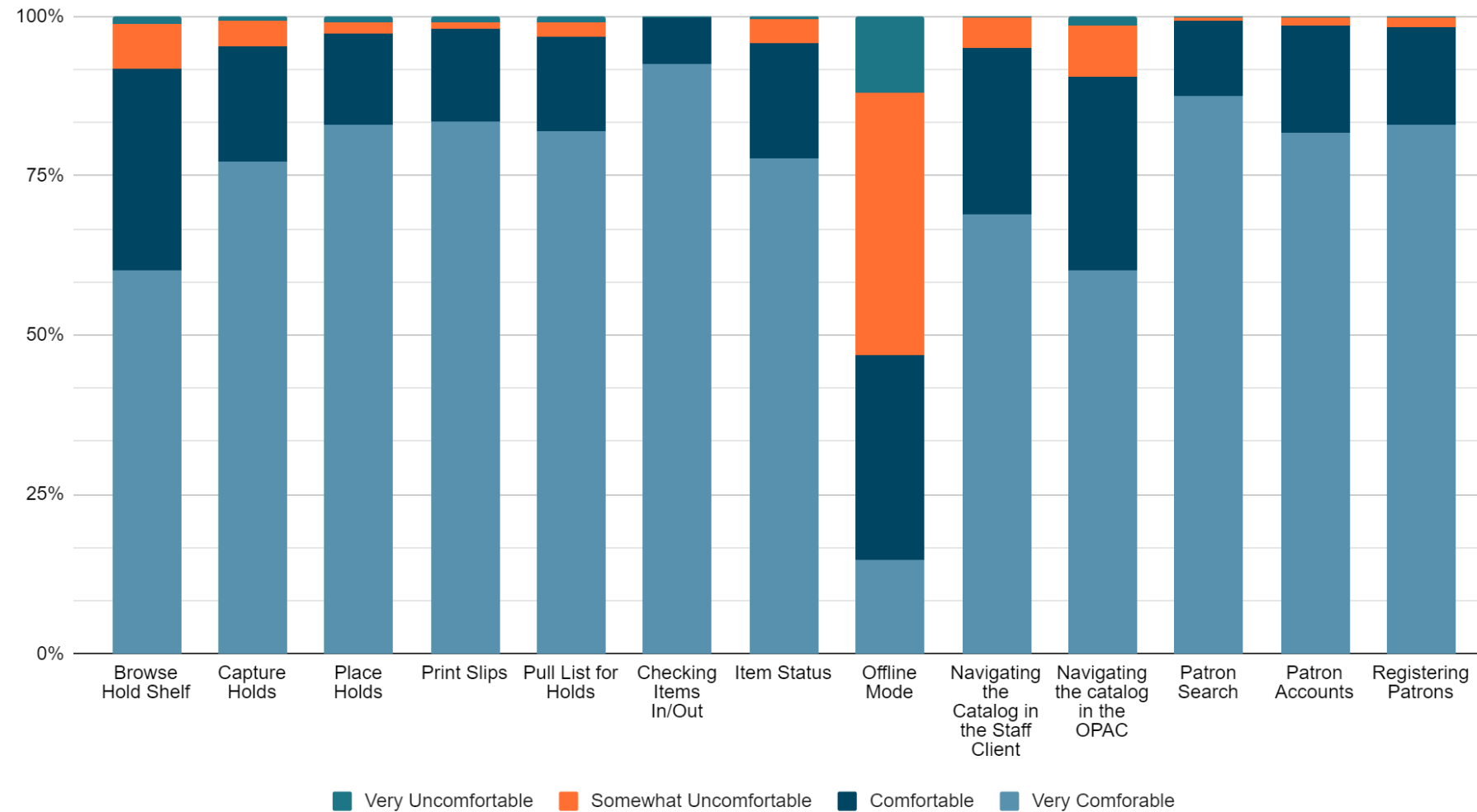
Staff Survey





Staff Survey

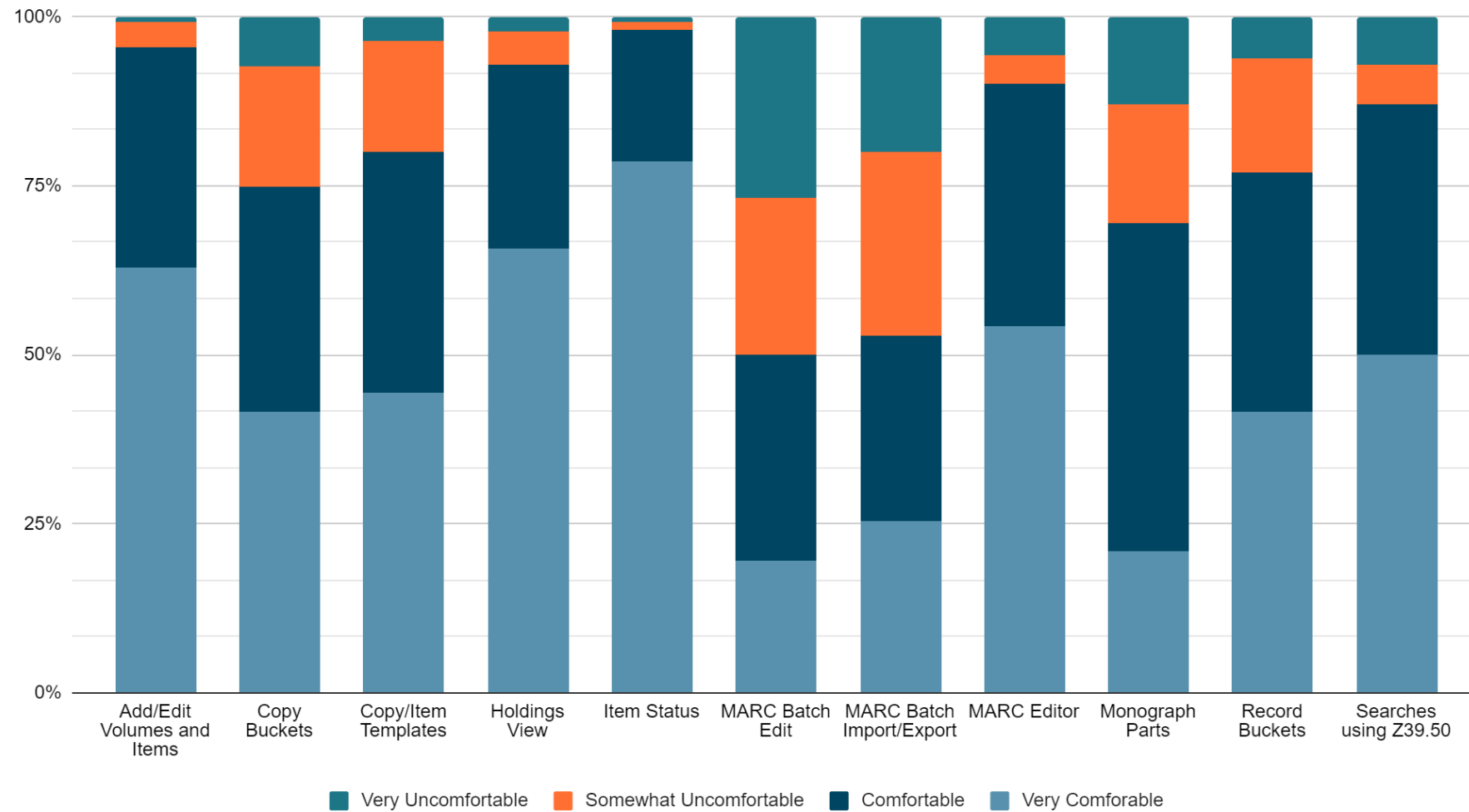
Circulation Functions and Hold Management (FY 2022-23)





Staff Survey

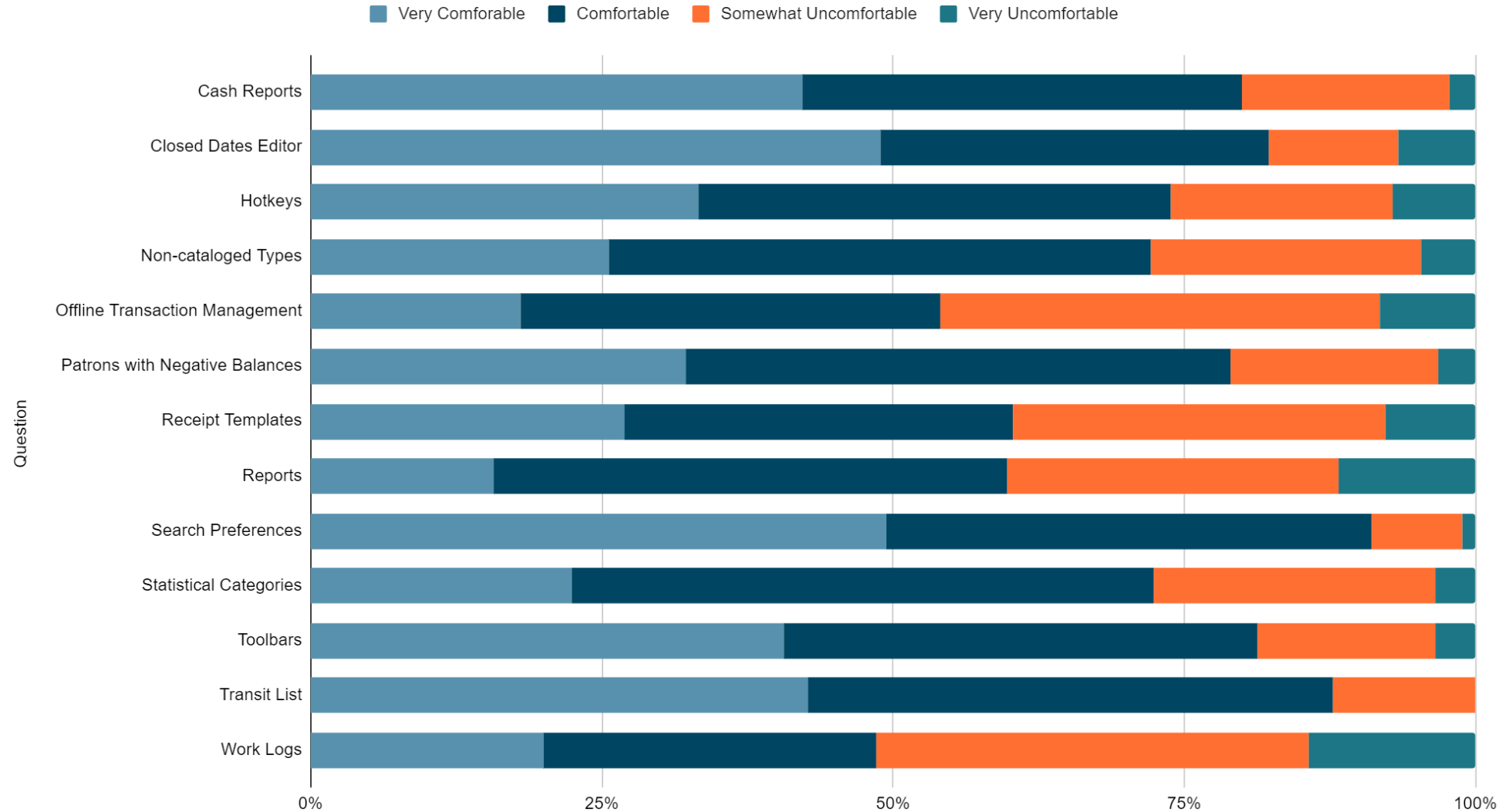
Cataloging Functions: Item and Bibliographic (FY 2022-23)





Staff Survey

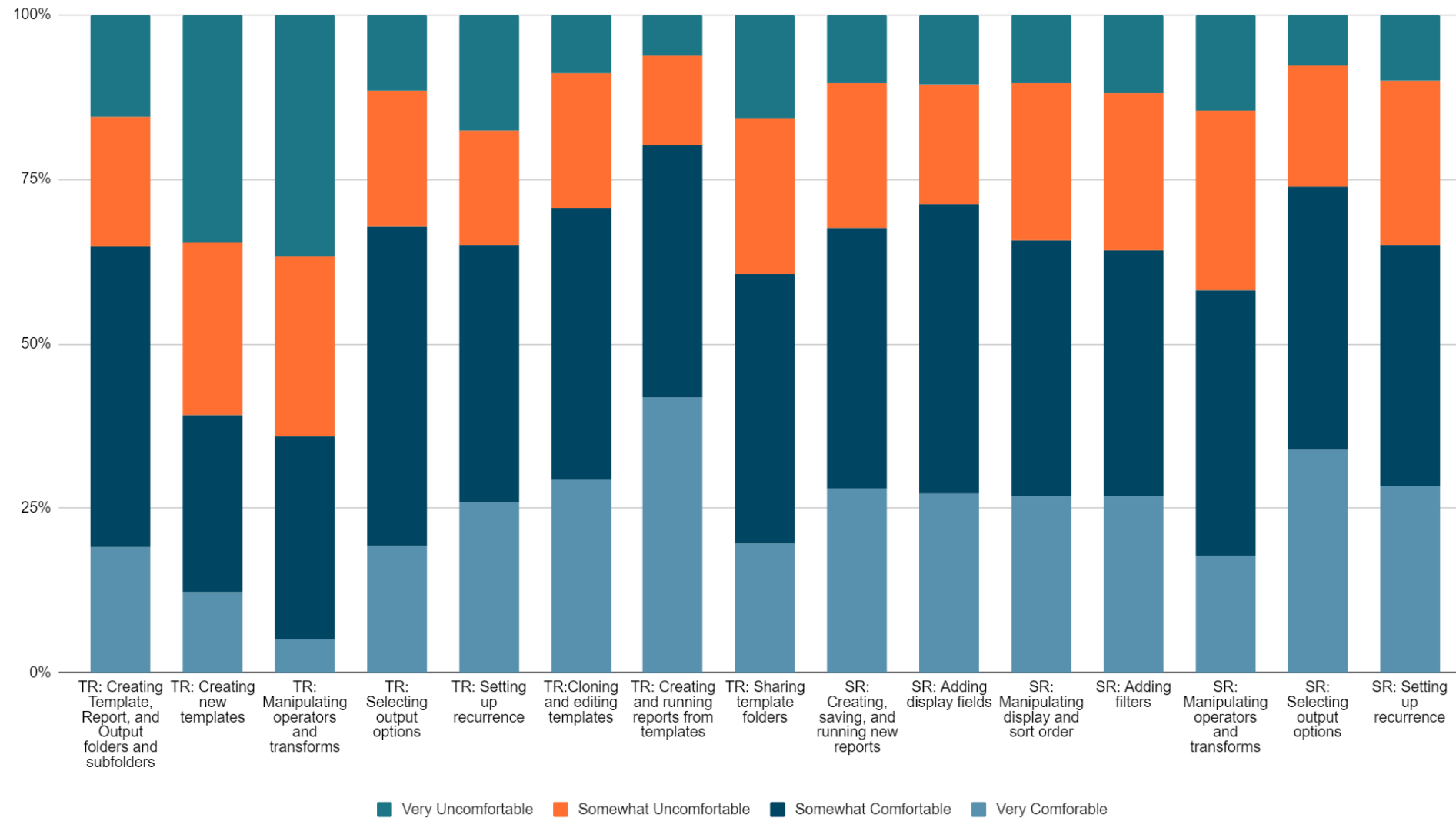
Comfort Level with Administrative Functions (FY 2022-23)





Staff Survey

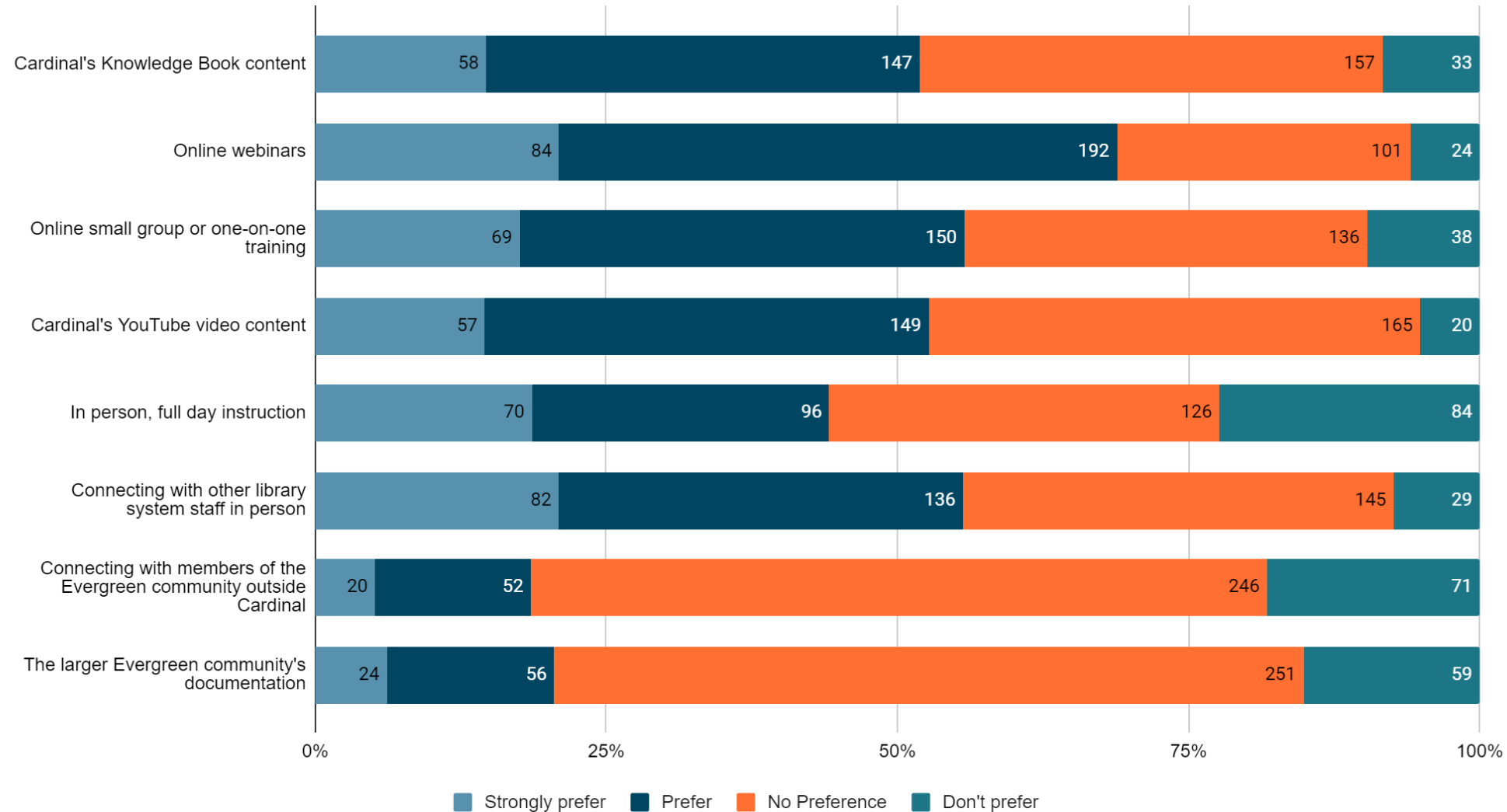
Comfort Level with Reports (FY 2022-23)





Staff Survey

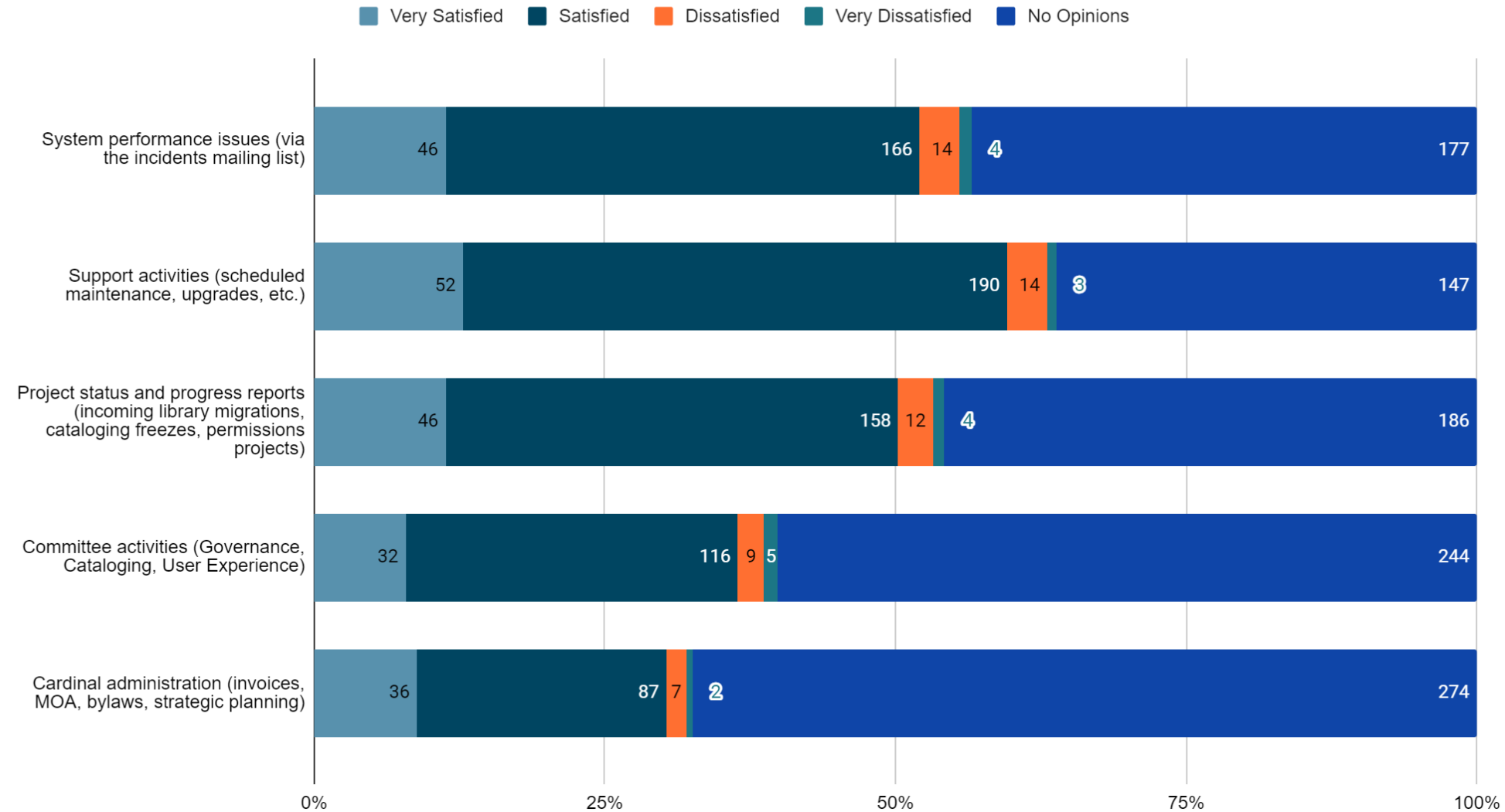
Training Methods and Materials Preferences (FY 2022-23)





Staff Survey

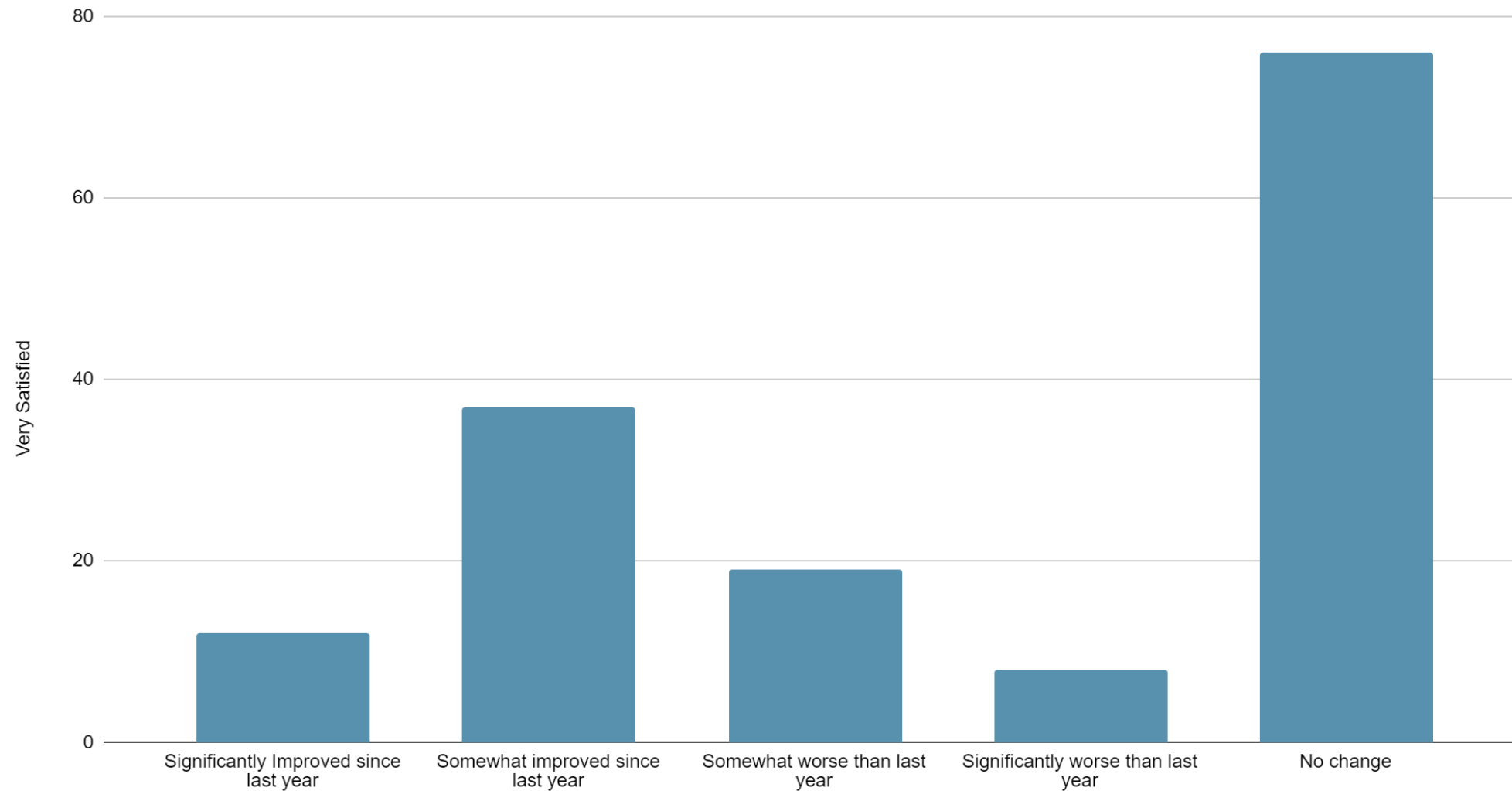
Training Methods and Materials Preferences (FY 2022-23)





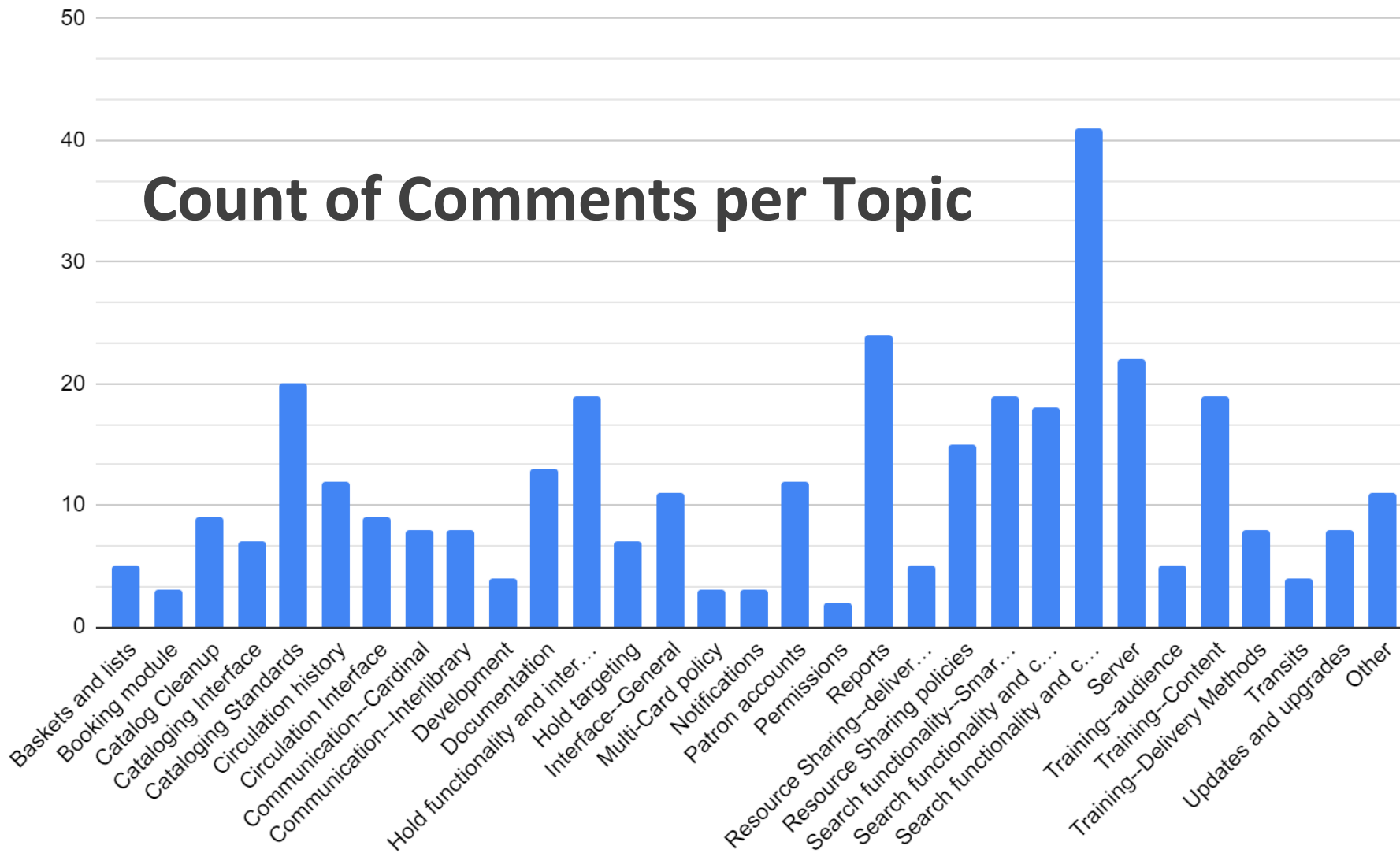
Staff Survey

Resource Sharing: FedEx improvement





Staff Survey





Projects for the Year Ahead

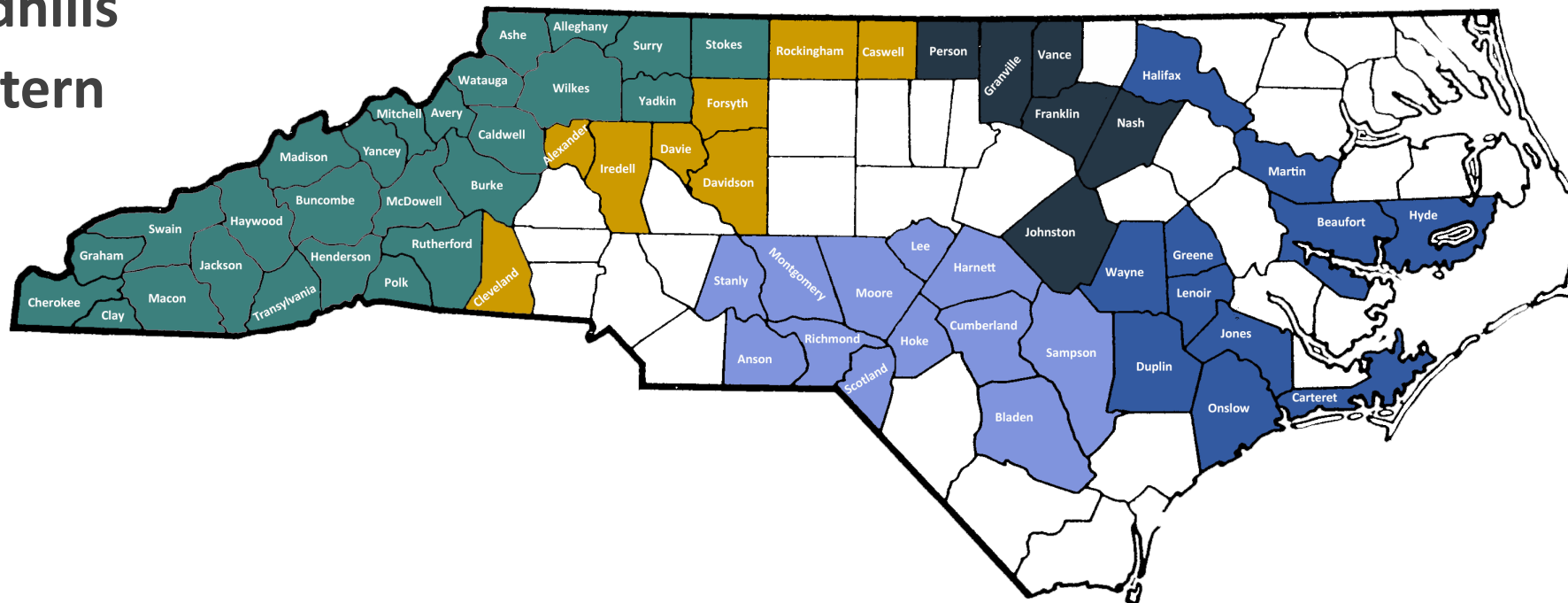
Regional Training Sessions

- **5 regions:**

- Eastern
- North Central
- Piedmont/Triad
- Sandhills
- Western

Each region will host a live, in-person training session this year

- Piedmont/Triad in September
- North Central in February
- Eastern in March
- Western in April
- Sandhills in May



Custom OPAC Colors

The screenshot displays the Gibsonville Public Library System OPAC interface. The main header includes the library logo, navigation links (Home, NC LIVE, NC Kids Digital), and user options (Sign Up, My Account). The search bar is set to 'Basic' search mode. The search results page shows a list of books under the heading 'Newly added items'. The search criteria are 'author:tom clancy', 'Format: All Formats', and 'Type: Author'. The results are sorted by 'Sort by Relevance'. The first result is 'Clancy, Tom 1947-2013 (14)', which is highlighted. The details for this result are shown on the right, including the title 'Clancy, Tom', the publisher 'Grand Haven, MI : Brilliance Audio, p2011', the ISBN '9781455865796', the edition 'Unabridged sound recording', and the physical description '15 sound discs (17 hr., 34 min.) : digital ; 4 3/4 in.'.

Gibsonville Public Library System

Home NC LIVE NC Kids Digital

Search The Catalog

Basic Advanced Browse

Search: Format: All Formats Type: Keyword Library: Gibsonville Public Library System

0x Basket Actions -- Go

Newly added items

Baby builders : bebés constructores Fallout Robert B. Parker's Bad Influence Clive Cussler Fire Strike The survivor Cross down Witch king Avata way of

Basic Advanced Browse

Search: author:tom clancy Format: All Formats

Type: Author Library: Gibsonville Public Library System Search Refine Search Disable Highlighting ☐

Another Search Advanced Search Sort by Sort by Relevance Show Fewer Details ☐ Limit to Available Items

☐ Group Formats and Editions ☐ Show Results from All Libraries ☐ Exclude Electronic Resources

Search Results Results 1 - 10 of 22 (page 1 of 3)

1 2 3 »

☐ Select 1 - 10 0 selected titles

Personal Author

Clancy, Tom 1947-2013 (14)

Brown, Clancy (6)

Bumpass, Rodger (5)

Cameron, Marc (5)

Fagerbakke, Bill 1957- (5)

More

Corporate Author

☐ Locked on

Clancy, Tom

2 of 2 copies available at NC Cardinal.
1 of 1 copy available at Gibsonville Public Library System.

Publisher: Grand Haven, MI : Brilliance Audio, p2011.

ISBN: 9781455865796

Edition: Unabridged sound recording

Phys. Desc.: 15 sound discs (17 hr., 34 min.) : digital ; 4 3/4 in.

☒ Place Hold ☐ Add to basket

<https://webaim.org/resources/contrastchecker/>

Alternate Templates

Record Editor: Alternate Action Trigger Templates

Enabled ☒

Template Locale Spanish

Template

```
[%- USE date -%]  
[%- user = target.0.usr -%]  
To: [%- params.recipient_email || user.email %]  
From: [%- circ.circ_lib.name %] <[% helpers.get_org_setting(target.0.circ_lib.id,  
'org.bounced_emails') || lib.email || params.sender_email || default_sender %]>  
Subject: Aviso de Retraso [NO RESPONDA]  
  
Estimado(a) [% user.first_given_name %] [% user.family_name %],  
  
La biblioteca desea llamar su atención sobre el(los) siguiente(s) artículo(s)  
atrasado(s). Por favor devuelva el(los) artículo(s) lo más pronto posible para  
evitar que le cobren costo(s) de reemplazo. Gracias.  
  
[% FOR circ IN target %]  
[%- copy_details = helpers.get_copy_bib_basics(circ.target_copy.id) -%]  
Título: [% helpers.escape_xml(copy_details.title) %]  
Fecha de vencimiento: [% date.format(helpers.format_date(circ.due_date),  
'%Y-%m-%d') %]  
Call #: [% circ.target_copy.call_number.label %]  
Codigo de barras: [% circ.target_copy.barcode %]  
[% END %]  
  
Para saber sobre nuestras sucursales y los horarios disponibles, visite  
https://www.hendersoncountync.gov/library/page/locations-and-hours.  
  
Si tiene alguna pregunta o necesita ayuda, llámenos al 828-697-4725 y  
estaremos contentos con proveerle asistencia.
```

You can now create notices for non-English users. They are attached to the standard notices and an “alternative template” replaces the English text.

We can create them for Email, SMS, and Print.

Alternative templates can exist for the following locales:

- Spanish
- French
- Czech
- Arabic
- Russian
- *Canadian*

Other Projects

- Video Record Clean Up Project
- Implement Marcive Homosaurus Thesaurus service integration
- Annual Spring De-duplication Project
- Consultations for Circulation and Hold Policy Reviews
- Providing new card request emails and patron sign up emails



Thoughts or Questions?