SLNC NC Research. Library Support. Talking Books.

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.

Institute of Museum and Library Services

Agenda:

Annual Report

Break

Discussion Activity

Lunch & Governance Vote

Discussion Activity

Annual Report Outline

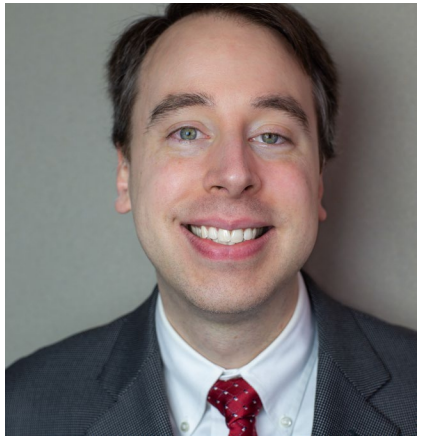
- Annual Statistics
- Resource Sharing
- Student Access Project
- Project Activities
- Committee Work
- Library Migrations
- Staff Survey
- Support Activity
- Projects for the Year Ahead

The Cardinal Team

Courtney Brown
Systems Librarian

Benjamin Murphy
Program Manager

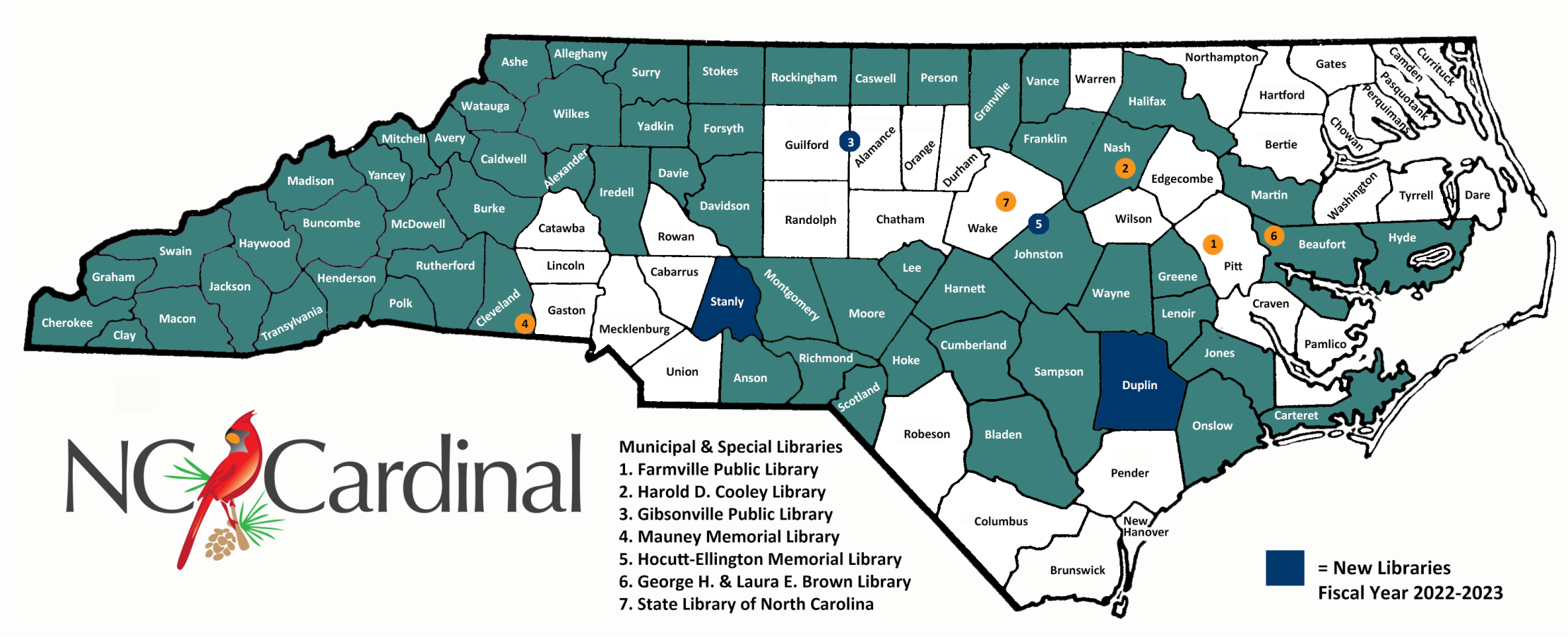
Will Szwagiel
Project Manager



Llewellyn Marshall
Application Administrator / Developer

Samantha O'Connor
Training Specialist

NC Cardinal in 2022-2023

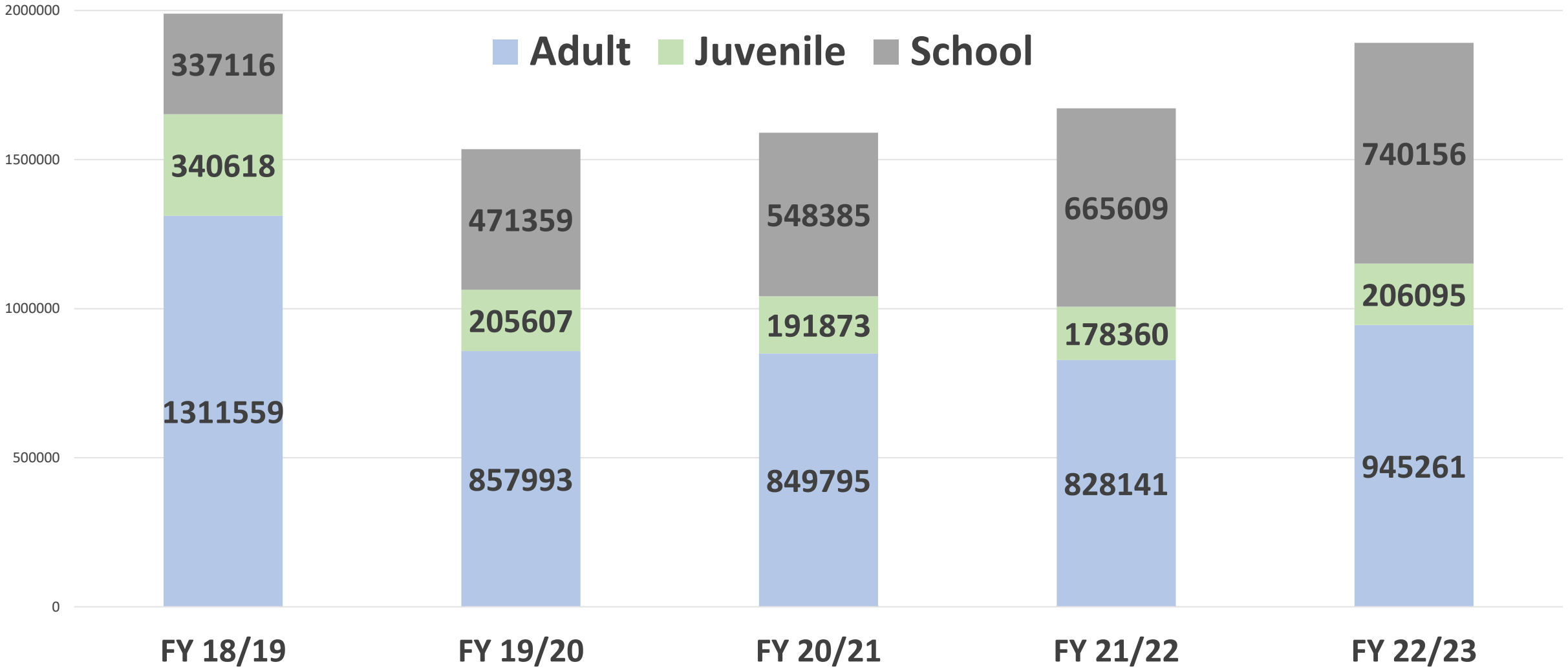


61 counties, 4 municipalities, 7 Special Libraries
210 branches

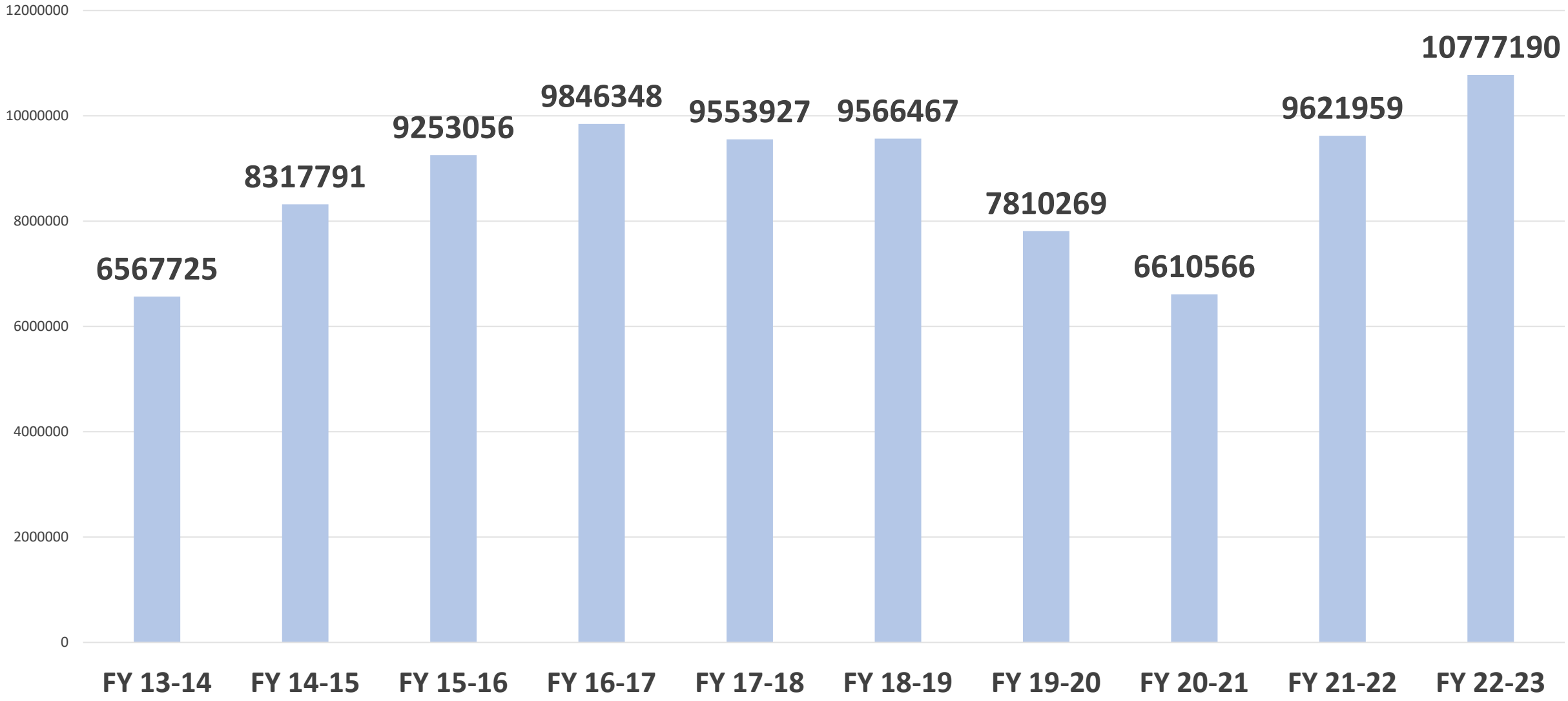
63 counties, 6 municipalities, 7 Special Libraries
223 branches

Annual Statistics

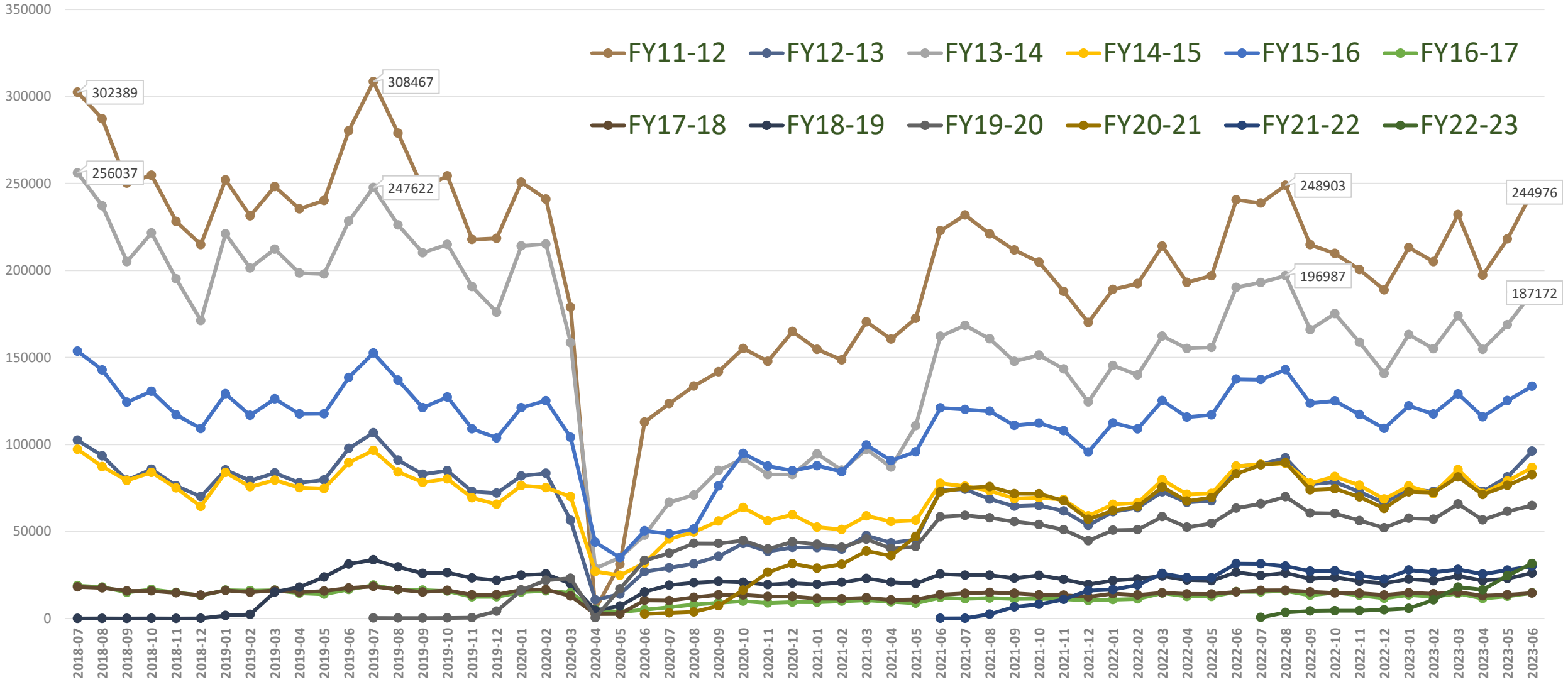
Active User Accounts: Last Five Years



Total Circulations

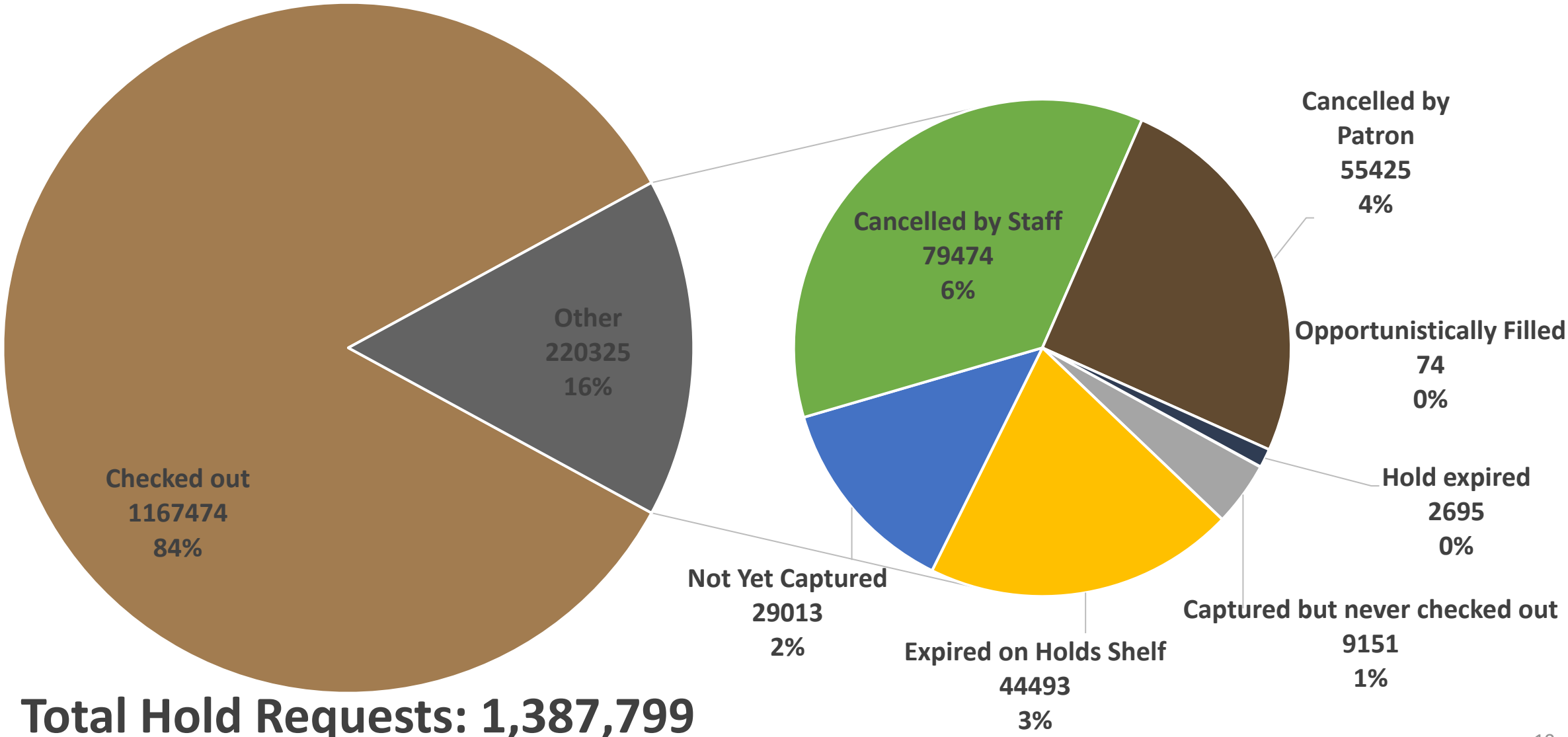


Circulation per Year Joined



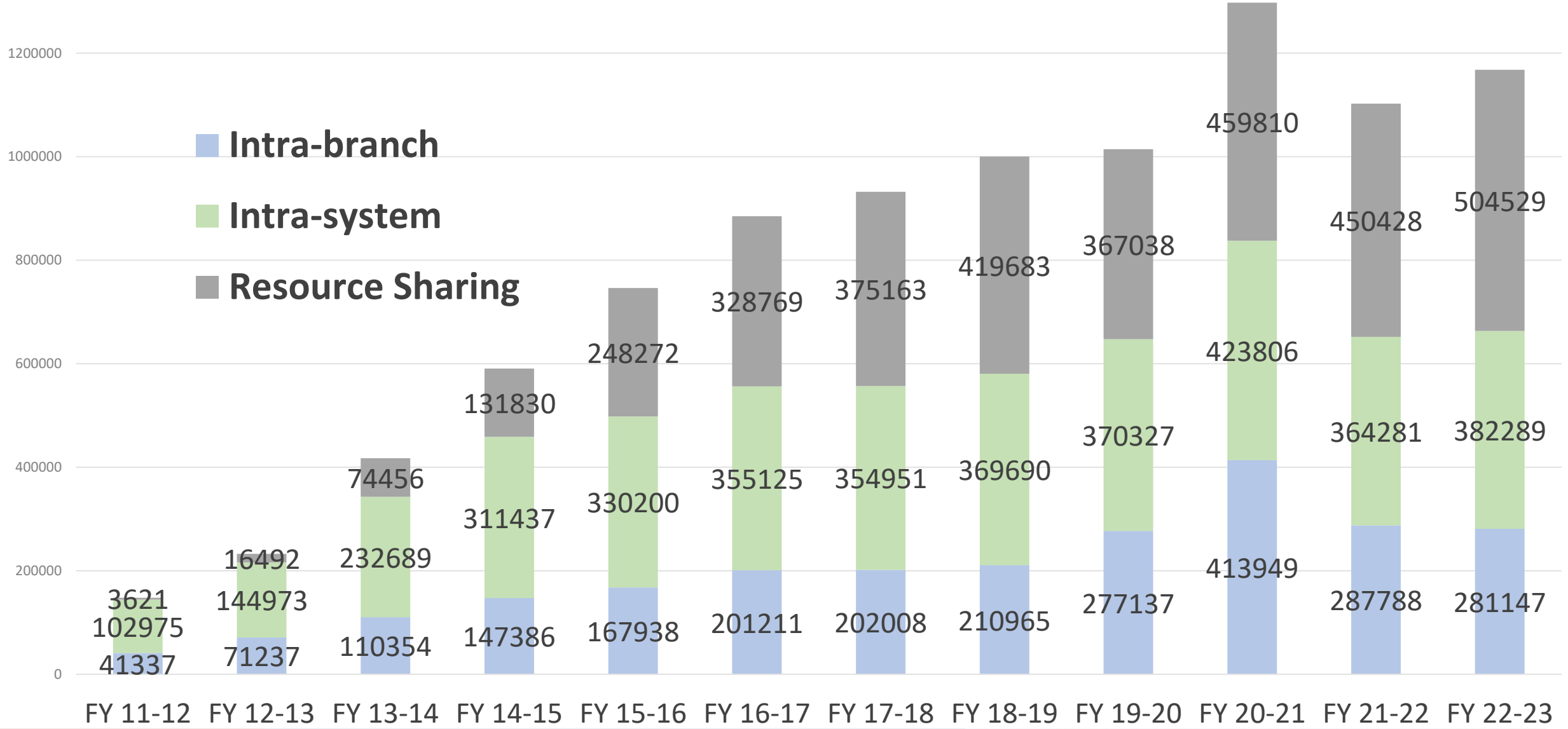
Hold Requests and Resource Sharing

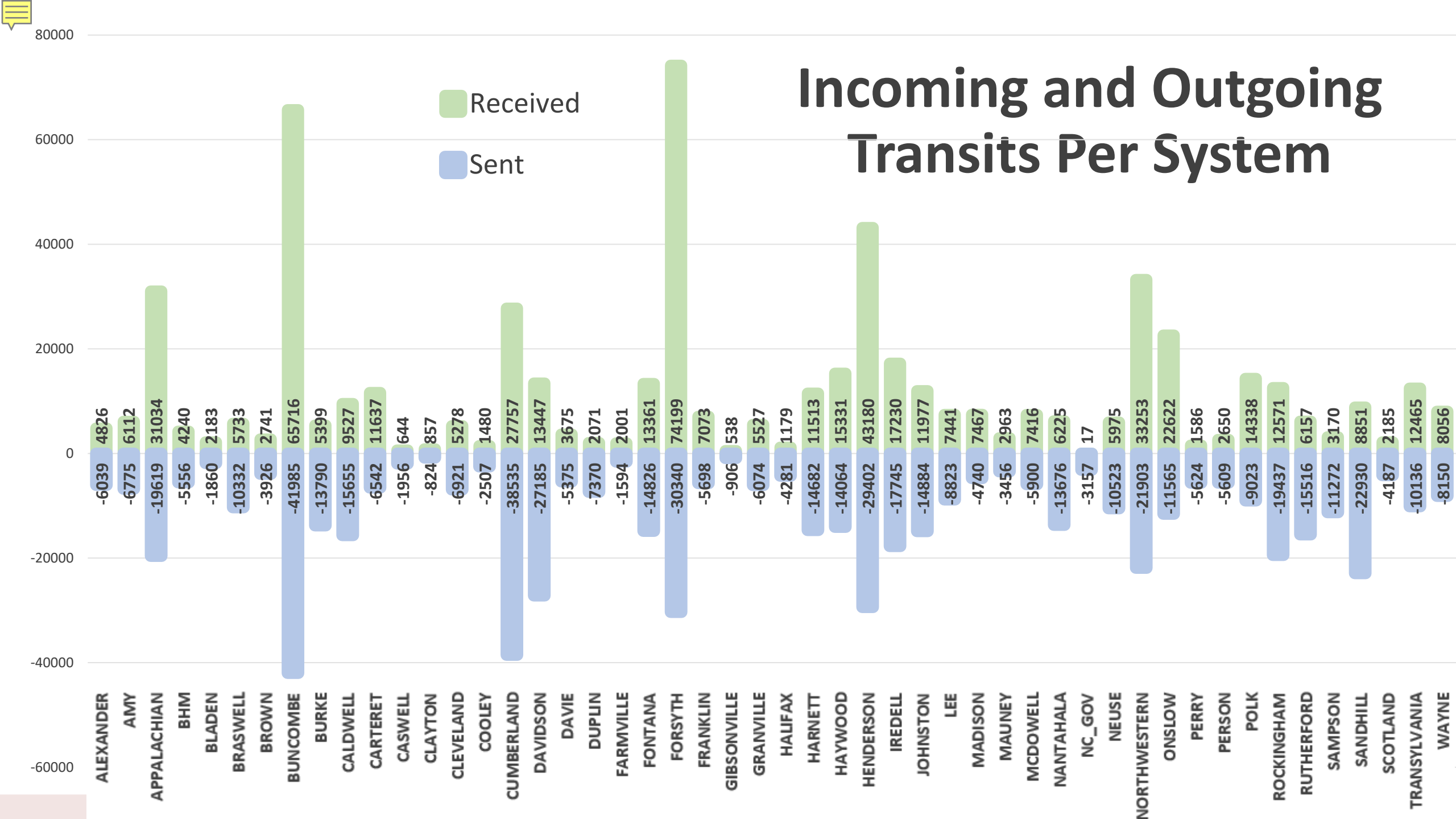
Outcome of Hold Requests



Total Hold Requests: 1,387,799

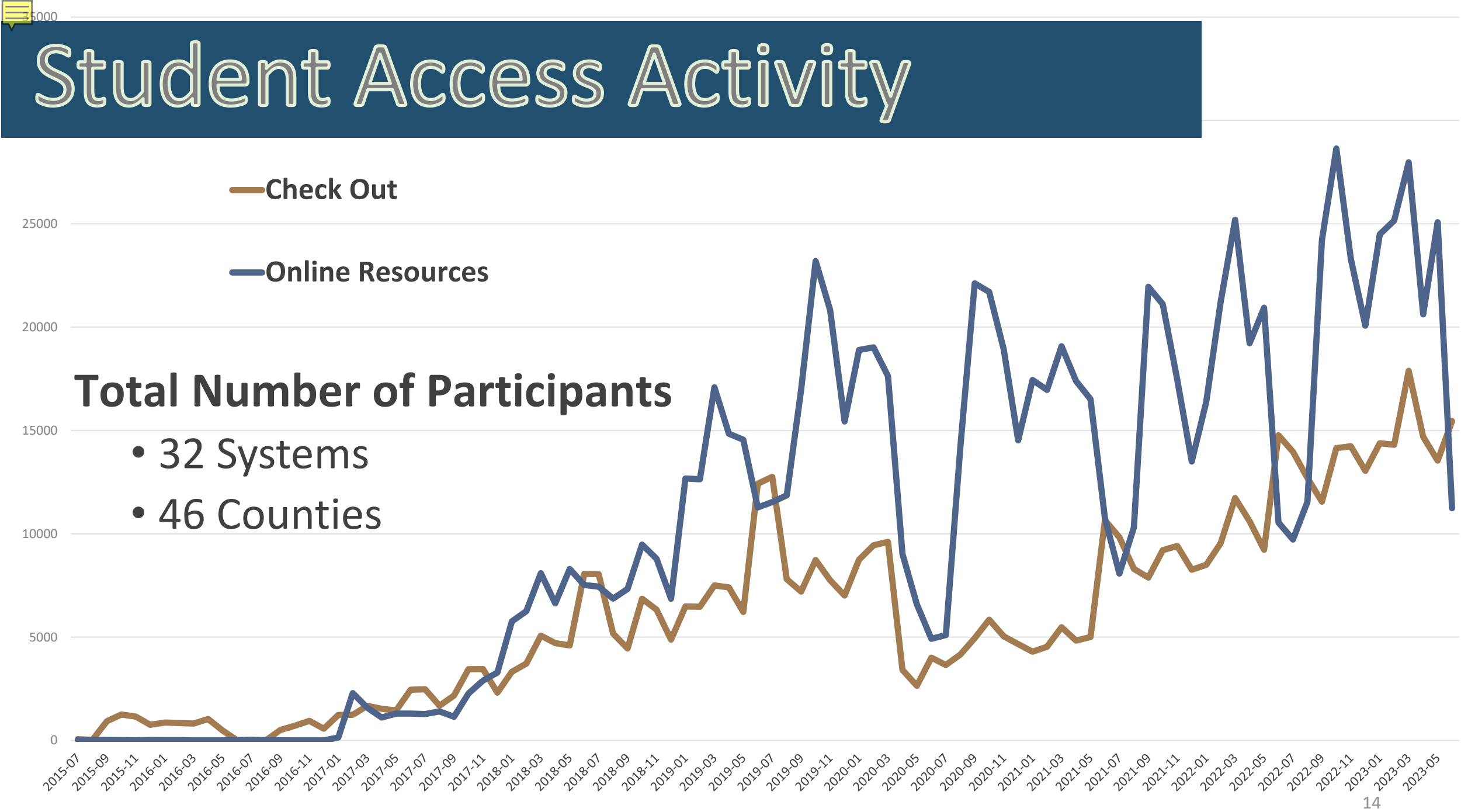
Source of Fulfilled Holds




Incoming and Outgoing Transits Per System
Received
Sent
80000
60000
40000
20000
0
-20000
-40000
-60000
ALEXANDER 4826 -6039
AMY 6112 -6775
APPALACHIAN 31034 -19619
BHM 4240 -5556
BLADEN 2183 -1860
BRASWELL 5733 -10332
BROWN 2741 -3926
BUNCOMBE 65716 -41985
BURKE 5399 -13790
CALDWELL 9527 -15655
CARTERET 11637 -6542
CASWELL 644 -1956
CLAYTON 857 -824
CLEVELAND 5278 -6921
COOLEY 1480 -2507
CUMBERLAND 27757 -38535
DAVIDSON 13447 -27185
DAVIE 3675 -5375
DUPLIN 2071 -7370
FARMVILLE 2001 -1594
FONTANA 13361 -14826
FORSYTH 74199 -30340
FRANKLIN 7073 -5698
GIBSONVILLE 538 -906
GRANVILLE 5527 -6074
HALIFAX 1179 -4281
HARNETT 11513 -14682
HAYWOOD 15331 -14064
HENDERSON 43180 -29402
IREDELL 17230 -17745
JOHNSTON 11977 -14884
LEE 7441 -8823
MADISON 7467 -4740
MAUNEY 2963 -3456
MCDOWELL 7416 -5900
NANTAHALA 6225 -13676
NC_GOV 17 -3157
NEUSE 5975 -10523
NORTHWESTERN 33253 -21903
ONSLOW 22622 -11565
PERRY 1586 -5624
PERSON 2650 -5609
POLK 14338 -9023
ROCKINGHAM 12571 -19437
RUTHERFORD 6157 -15516
SAMPSON 3170 -11272
SANDHILL 8851 -22930
SCOTLAND 2185 -4187
TRANSYLVANIA 12465 -10136
WAYNE 8056 -8150

Student Access

Student Access Activity



Total Number of Participants

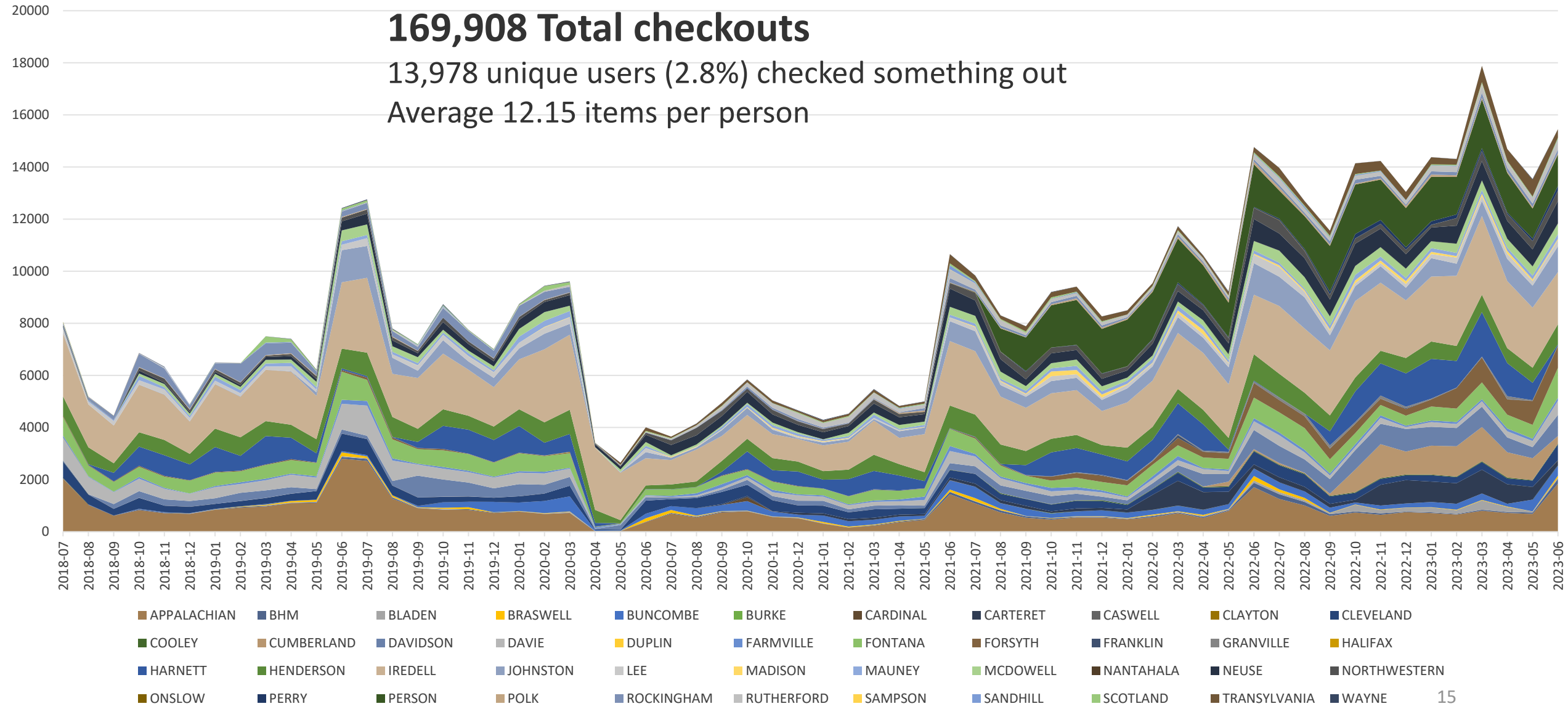
- 32 Systems
- 46 Counties

Student Access Circulations

169,908 Total checkouts

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

Average 12.15 items per person

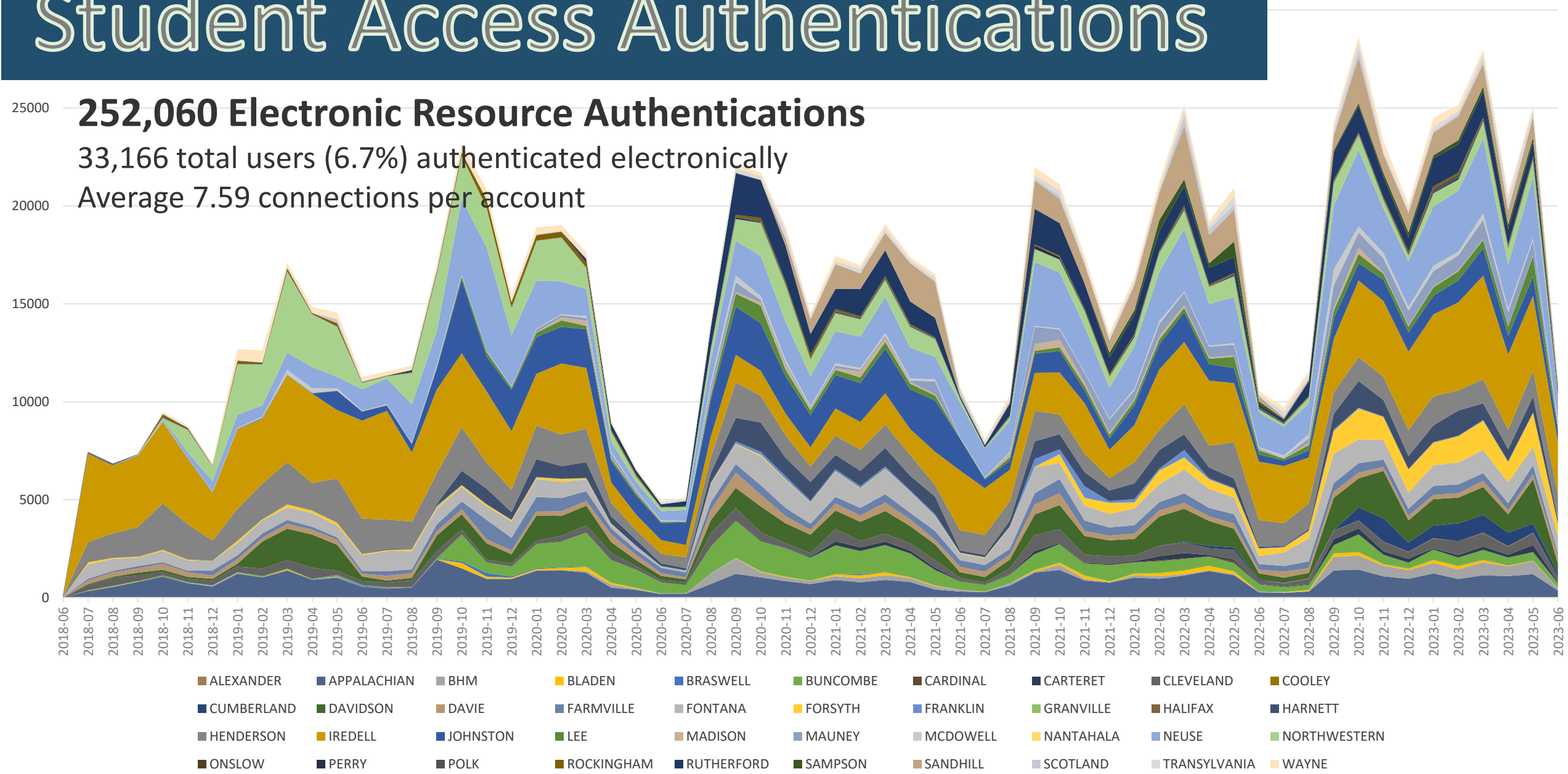


Student Access Authentications

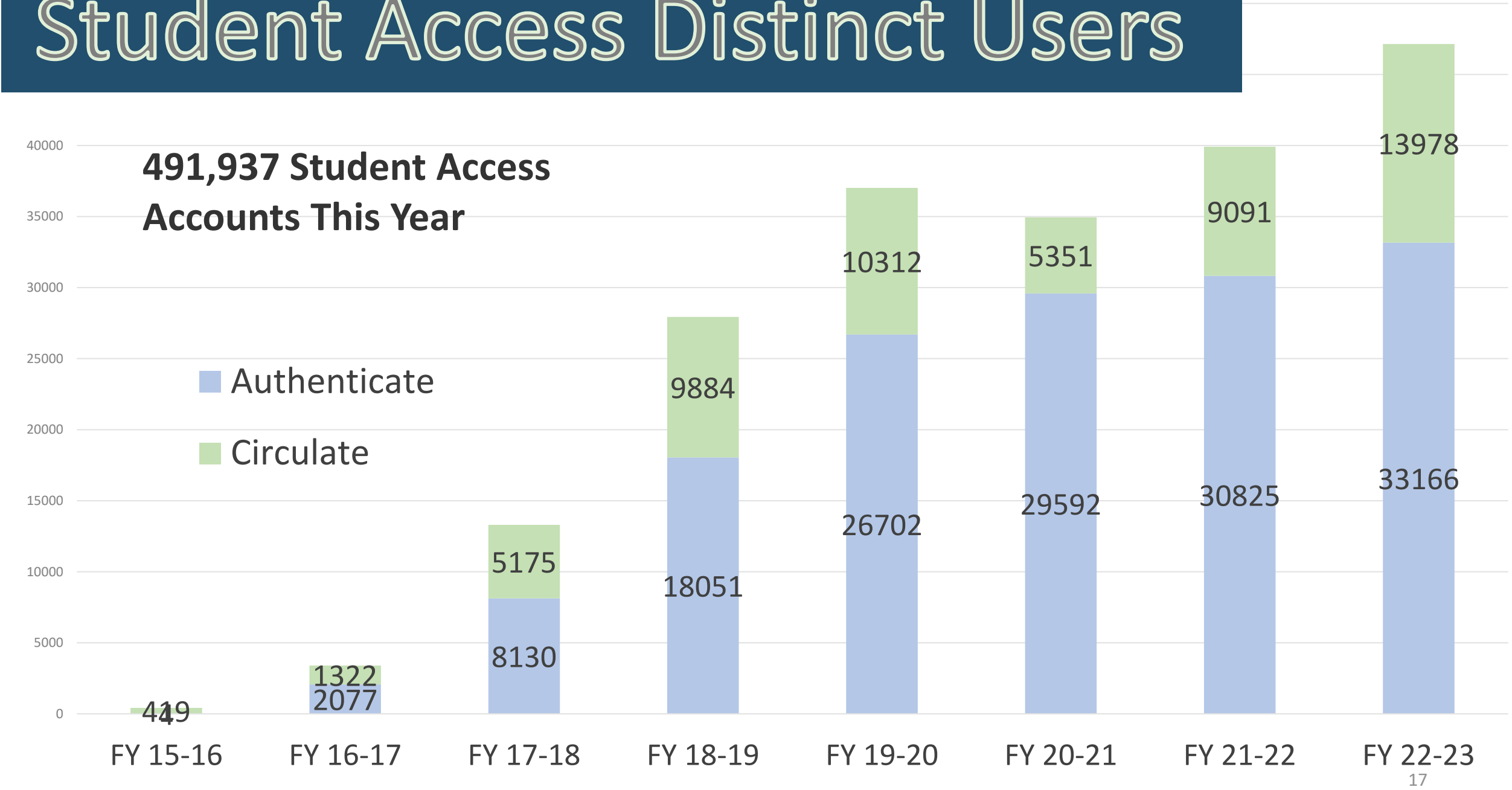
252,060 Electronic Resource Authentications

33,166 total users (6.7%) authenticated electronically

Average 7.59 connections per account



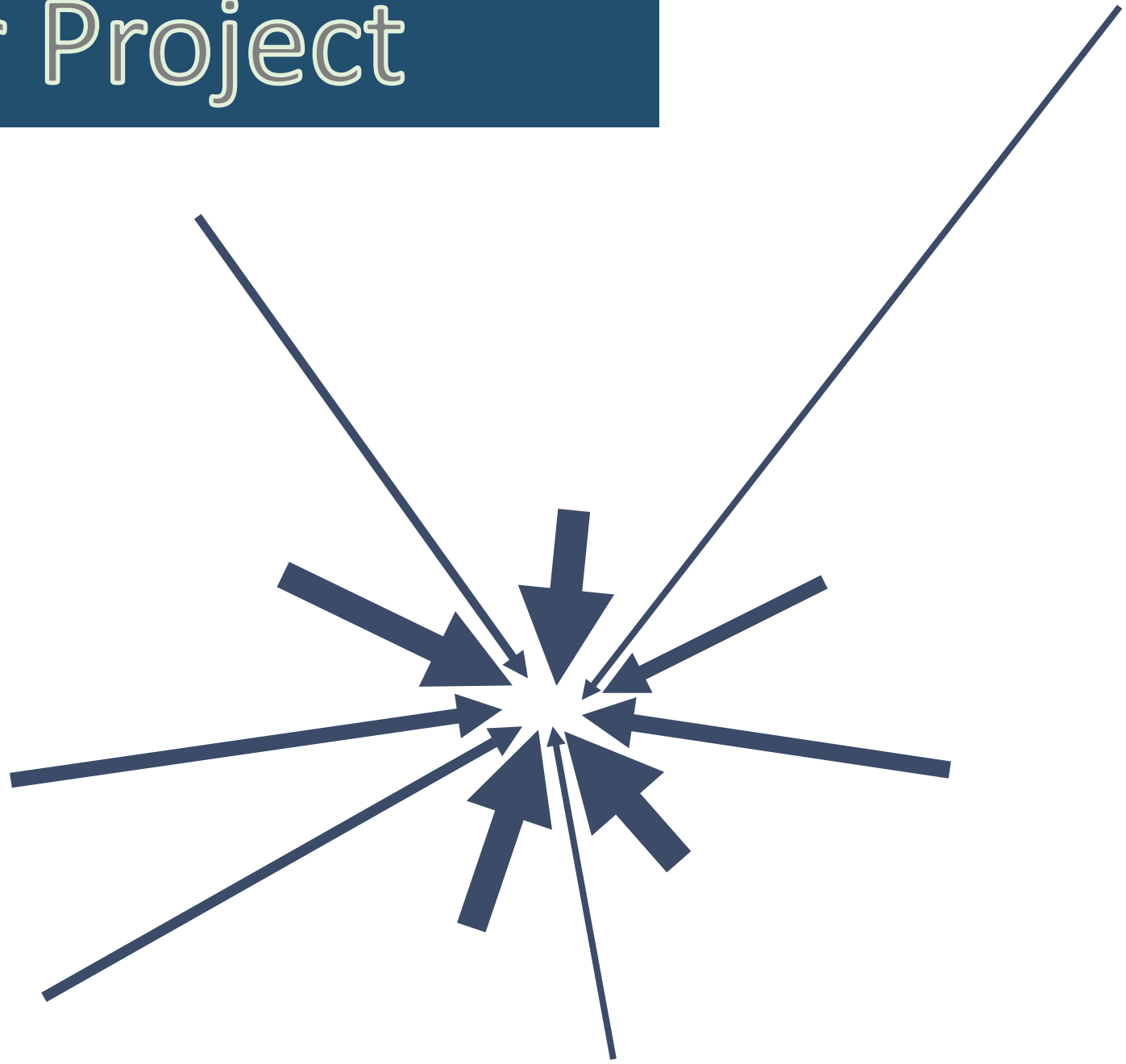
Student Access Distinct Users



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

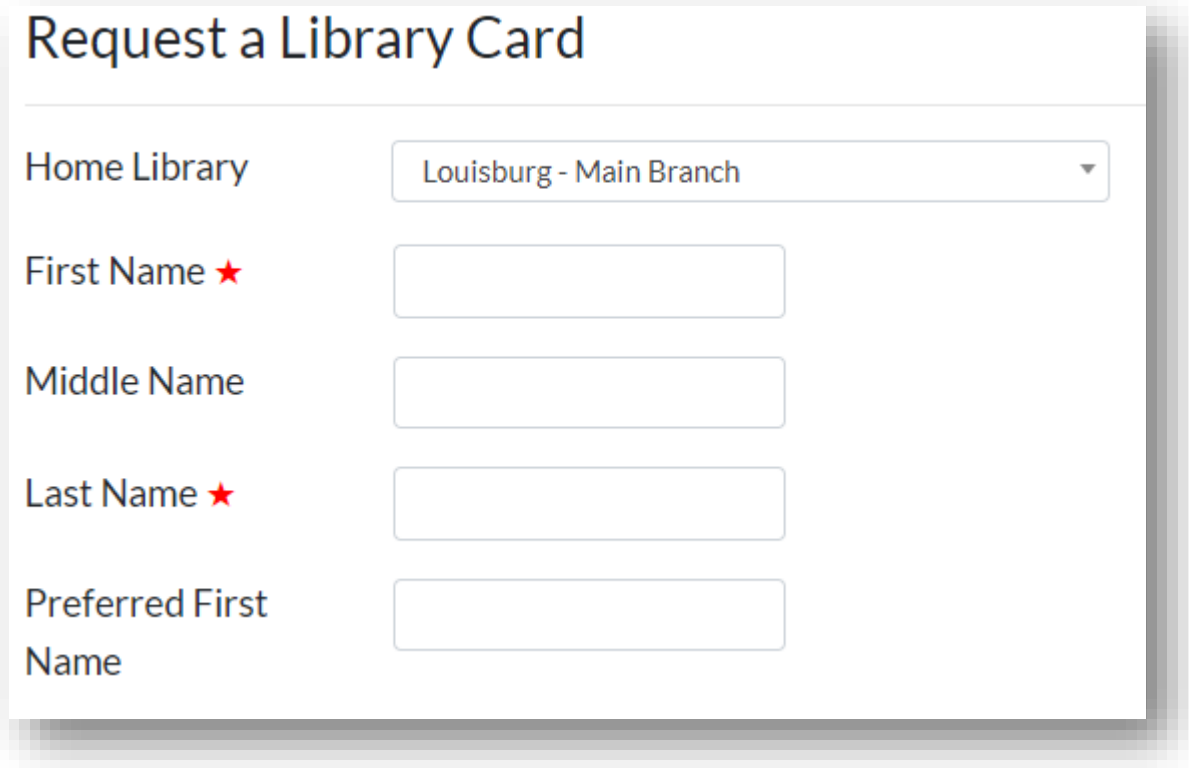


OPAC Bucket View

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



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

☐		Vigil Harbor	Glass, Julia, 1956-	F GLA	06/18/2022	07/02/2022	06/22/2022	0020513255164
☐		Let's not do that again : a novel	Ginder, Grant,	F GIN	06/18/2022	07/02/2022	06/30/2022	0020513243319
☐		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 2017-12-05

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

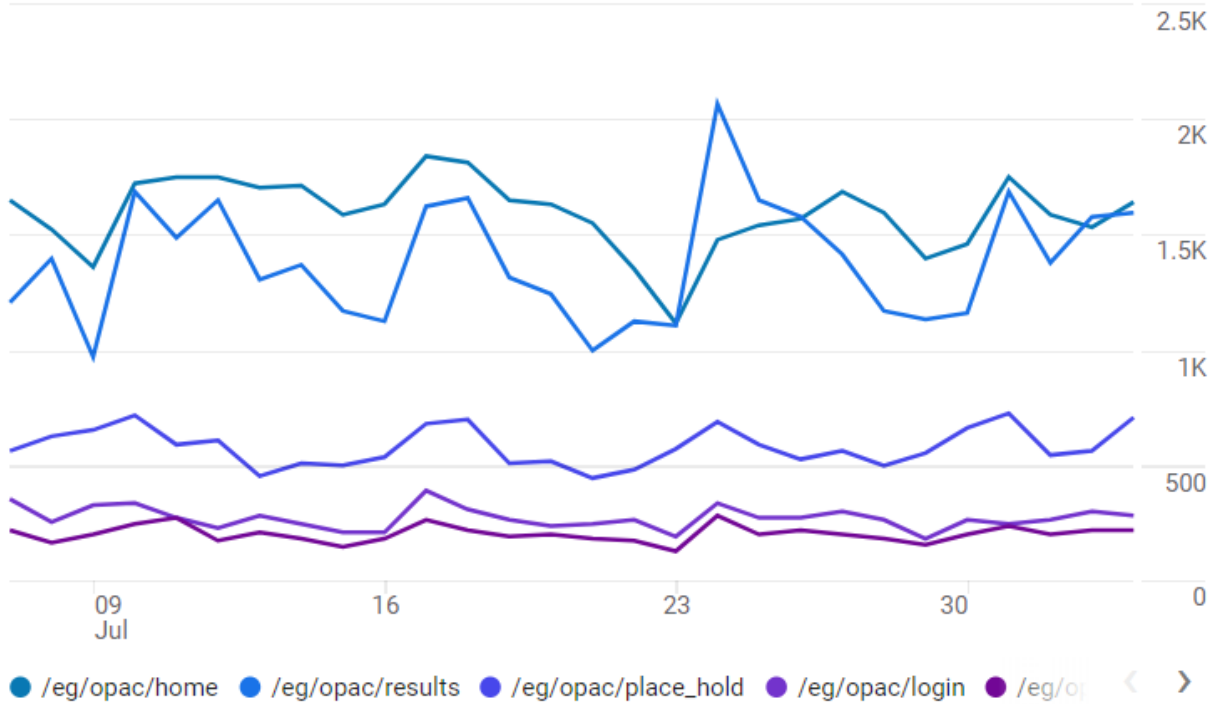
Google Analytics 4

Pages and screens: Page path and screen class

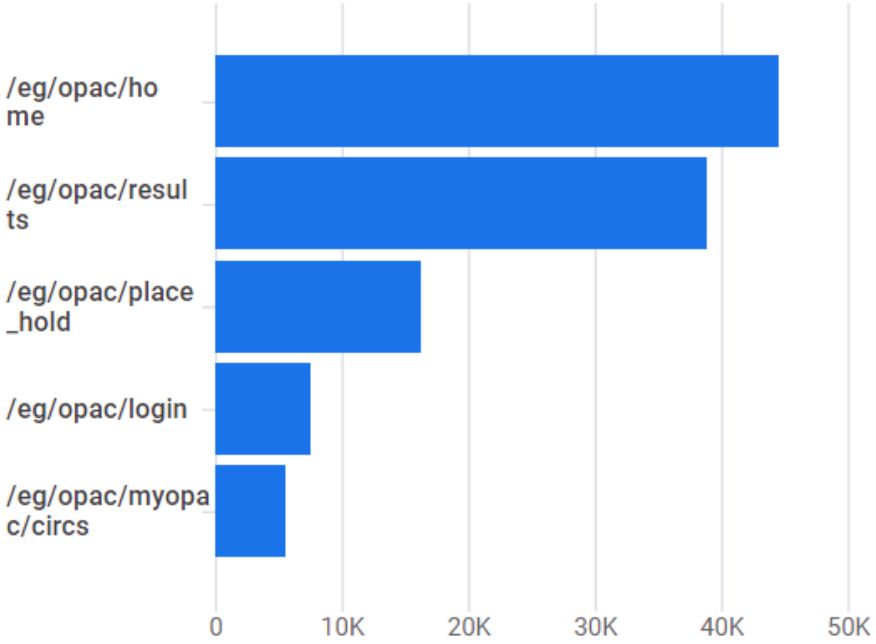
Hostname exactly matches ...

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

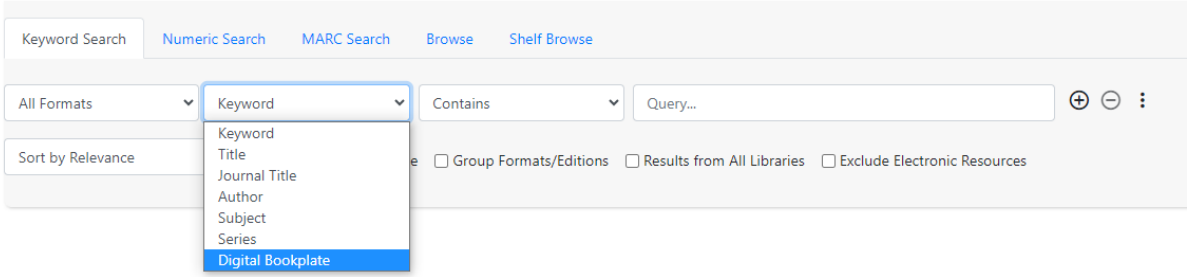
Lead Bib	Sub Bib	Lead Bib Link	Sub Bib Link	Lead Icon	Sub Icon	Lead Bib library w	Sub Bib library wi	Title
3248	9093165	http://nccardinal.org/eg/	http://nccardinal.org/eg/	book	book	BROWN_MAIN,DUNN,M/	SMITHFIELD	On the outside looking in !! C
3264	9089127	http://nccardinal.org/eg/	http://nccardinal.org/eg/	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_I	KENLY,SELMA	Raleigh's Eden !! Raleigh's Ed
4742	485494	http://nccardinal.or						ssissippi
5046	11709929	http://nccardinal.or						
5046	13383529	http://nccardinal.or						
5279	1705565	http://nccardinal.or						Our orie
5290	9055803	http://nccardinal.or						rous aun
5298	5038667	http://nccardinal.or						e 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 !! Workir
6301	10423381	http://nccardinal.org/eg/	http://nccardinal.org/eg/	book	book	BROWN_MAIN,LEATH,M/	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 heart
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}
 );
```

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



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

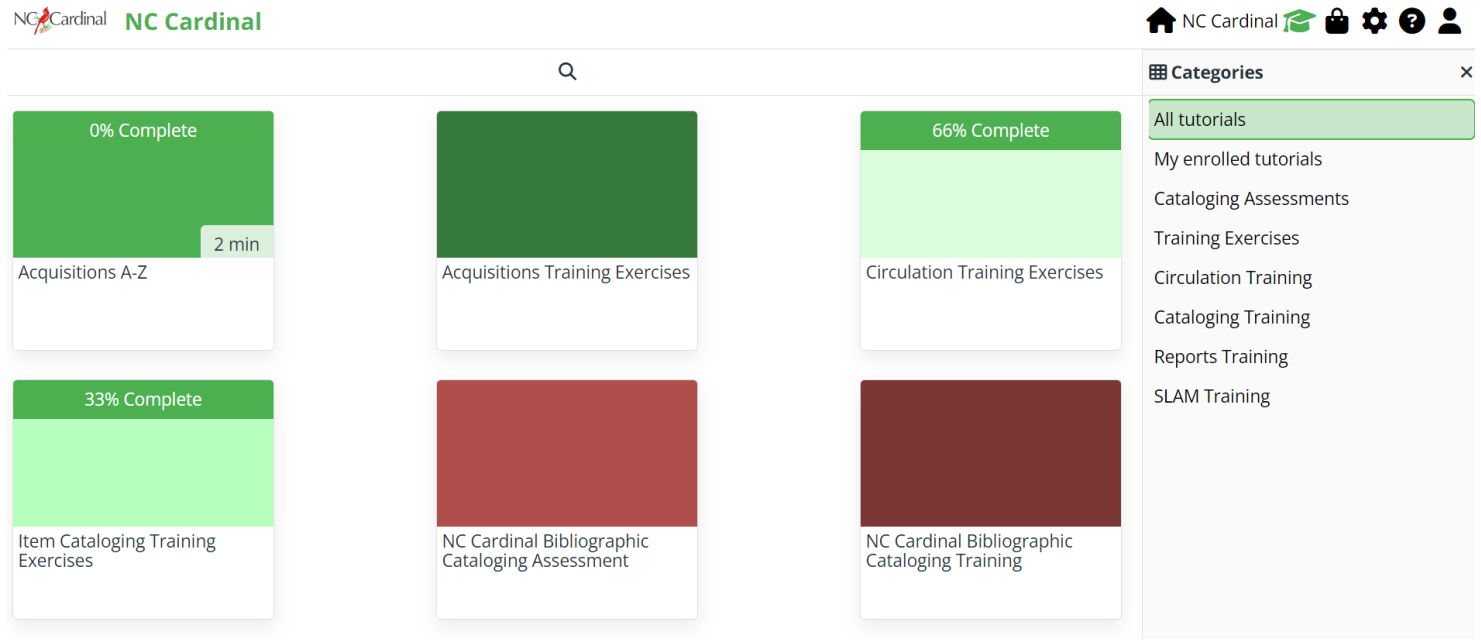
- Fall 2022 Upgrade to 3.9.1
- Hold Targeter testing
- Staff survey improvements
- OPAC accessibility
- Multi-Card Policy
- Regional Training

- 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

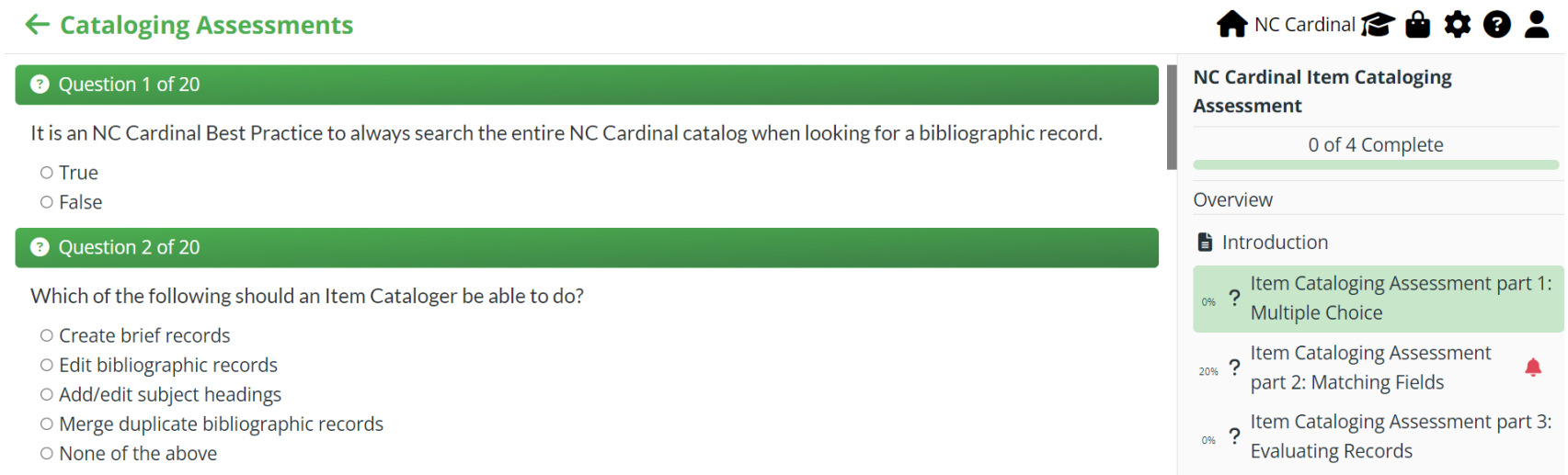
- 9 new learning modules available in NC Cardinal's Niche Academy.
- Long form tutorials include:
  - Bibliographic Cataloging
  - Acquisitions A-Z
  - SLAM training
- Short training exercises include:
  - Acquisitions
  - Circulation
  - Item Cataloging
  - Simple Reporter



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



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

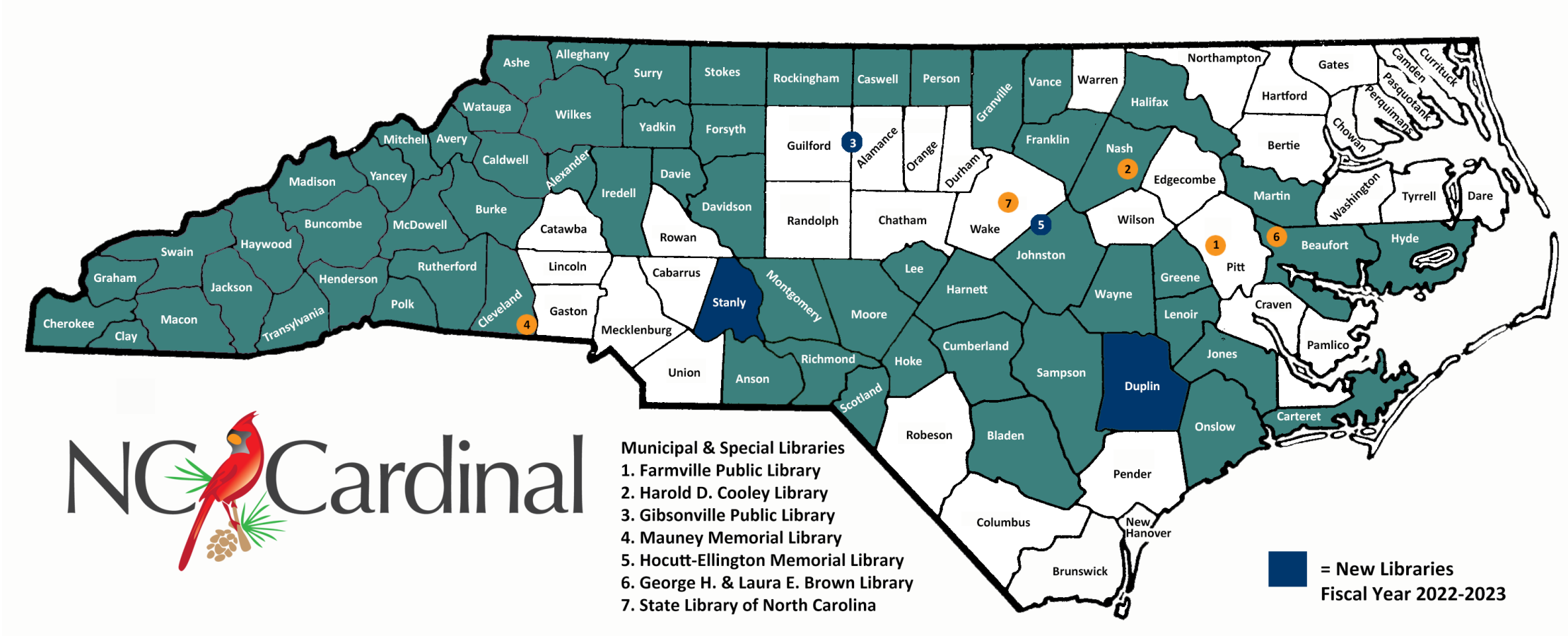
Library Settings Categories

Large number of settings, broken down into categories

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

New Cardinal Libraries

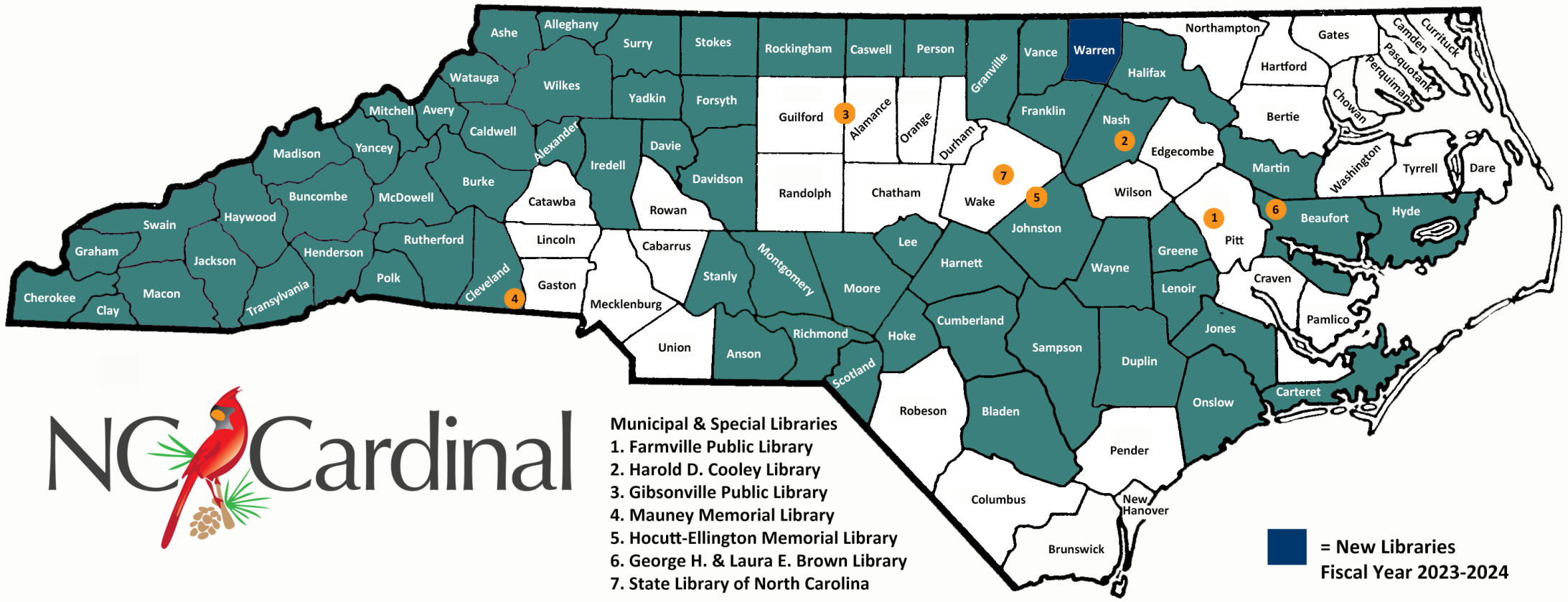
Library Migration in 22-23



63 counties, 6 municipalities, 7 Special Libraries
224 branches

Warren County Memorial Library

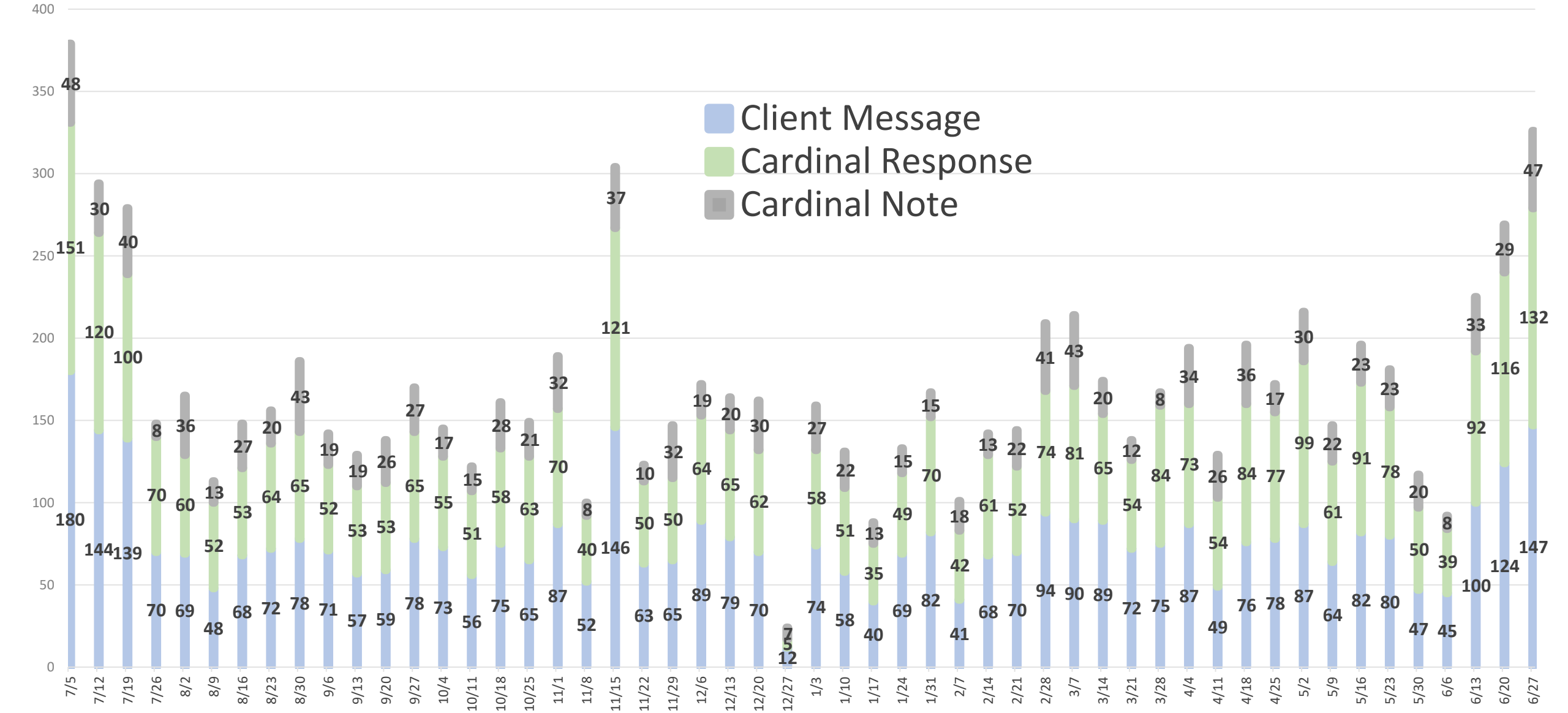
Library Migration in 23-24



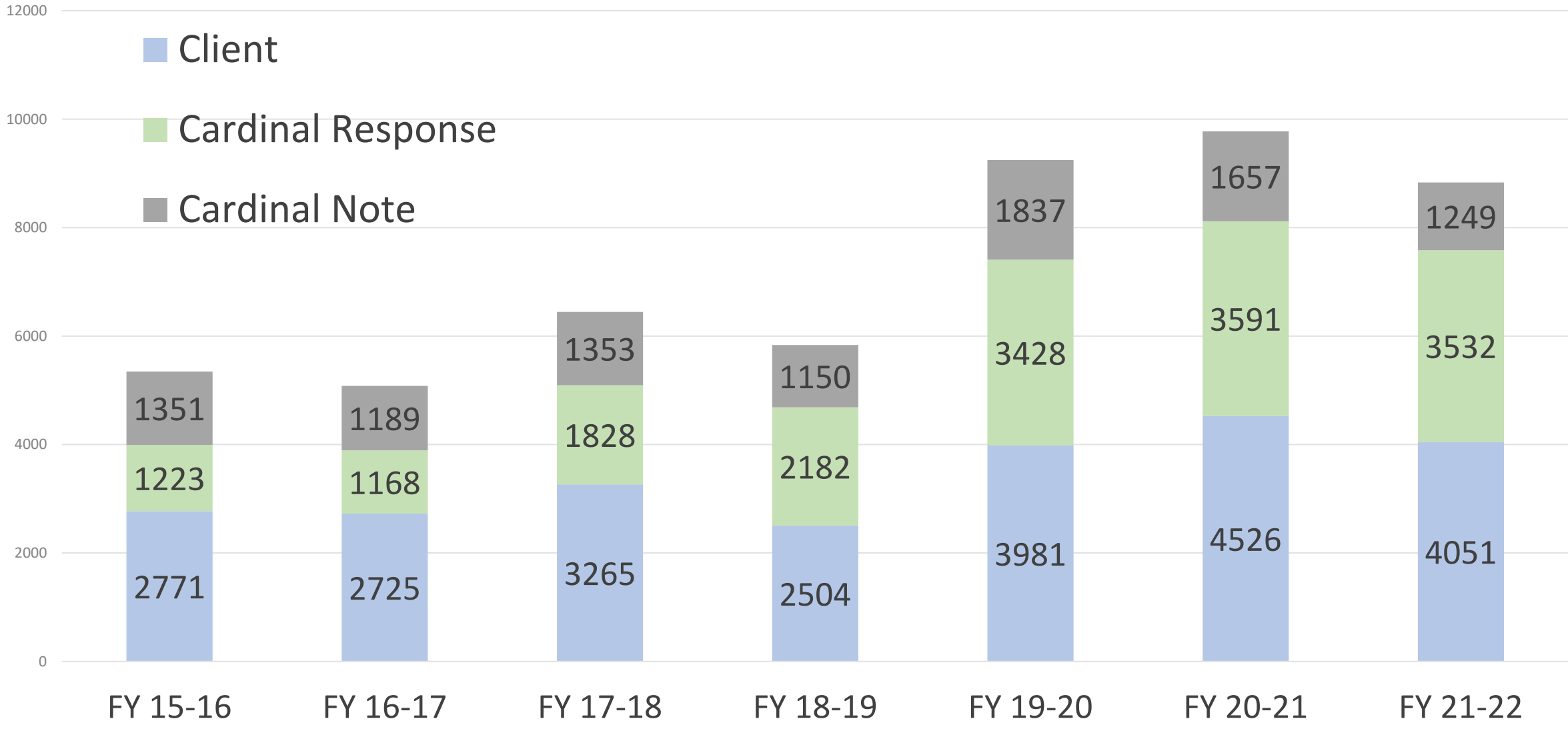
64 counties, 6 municipalities, 7 Special Libraries
225 branches

Cardinal Support Activity

Cardinal Support Activity 21-22

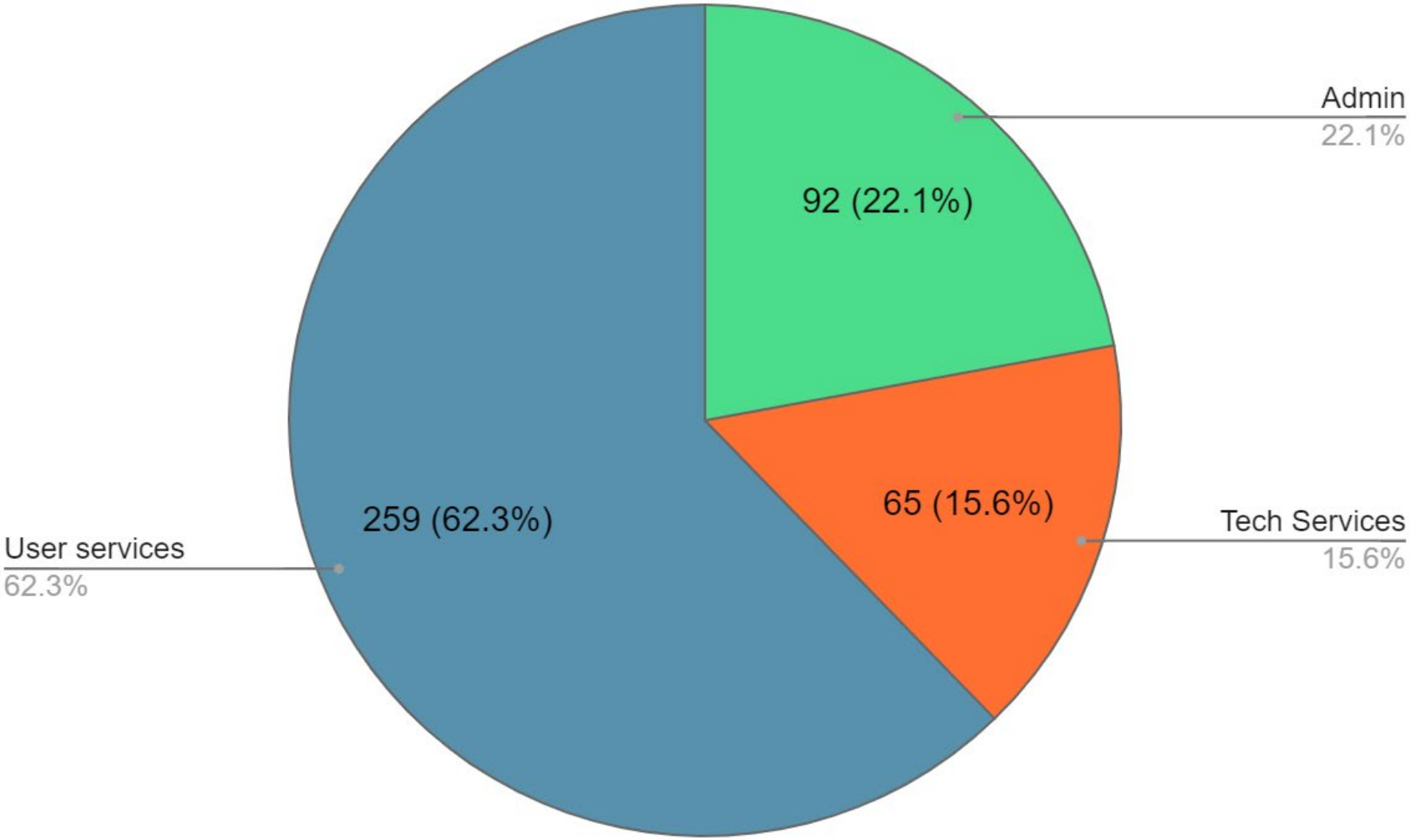


Cardinal Support Traffic

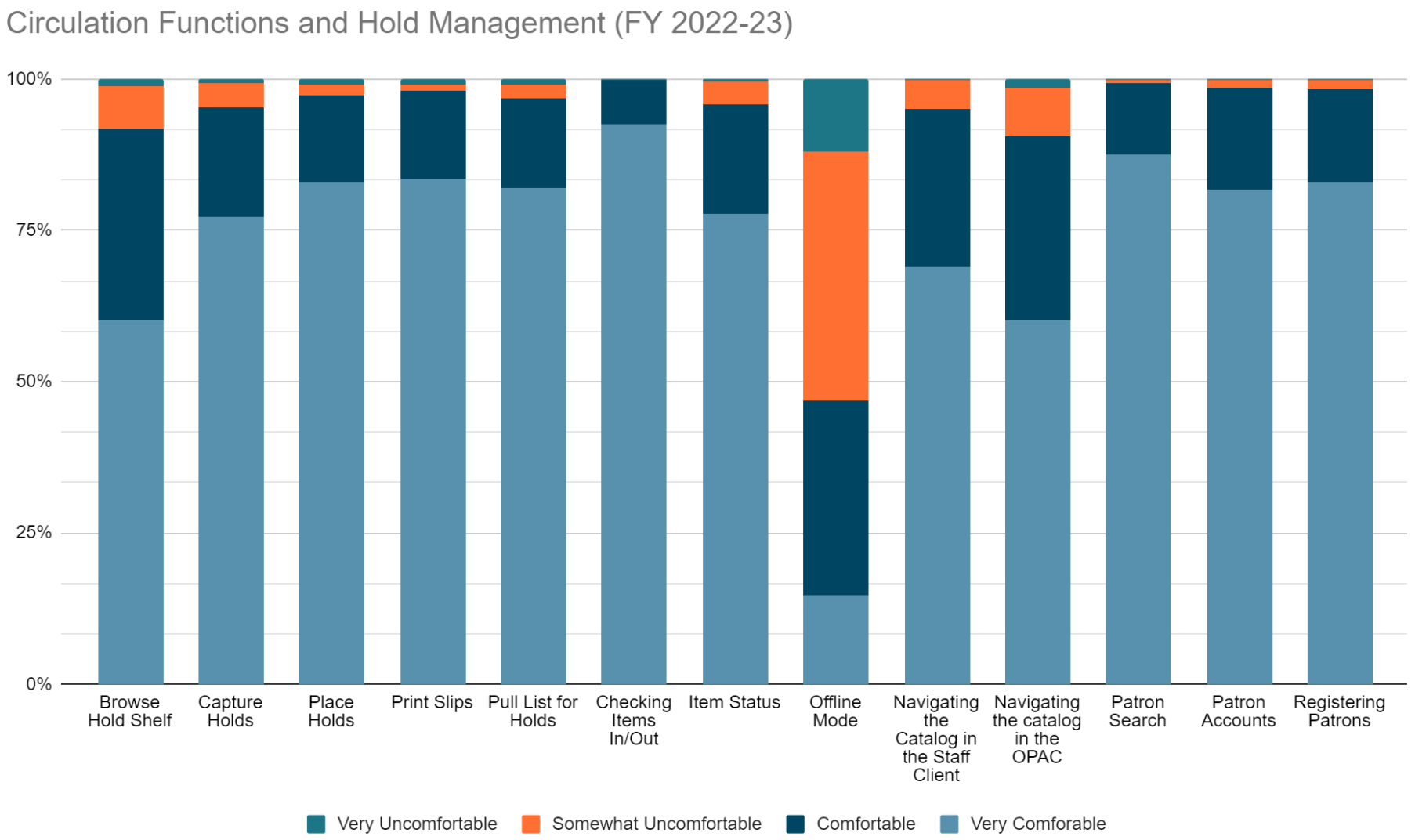


Staff Survey

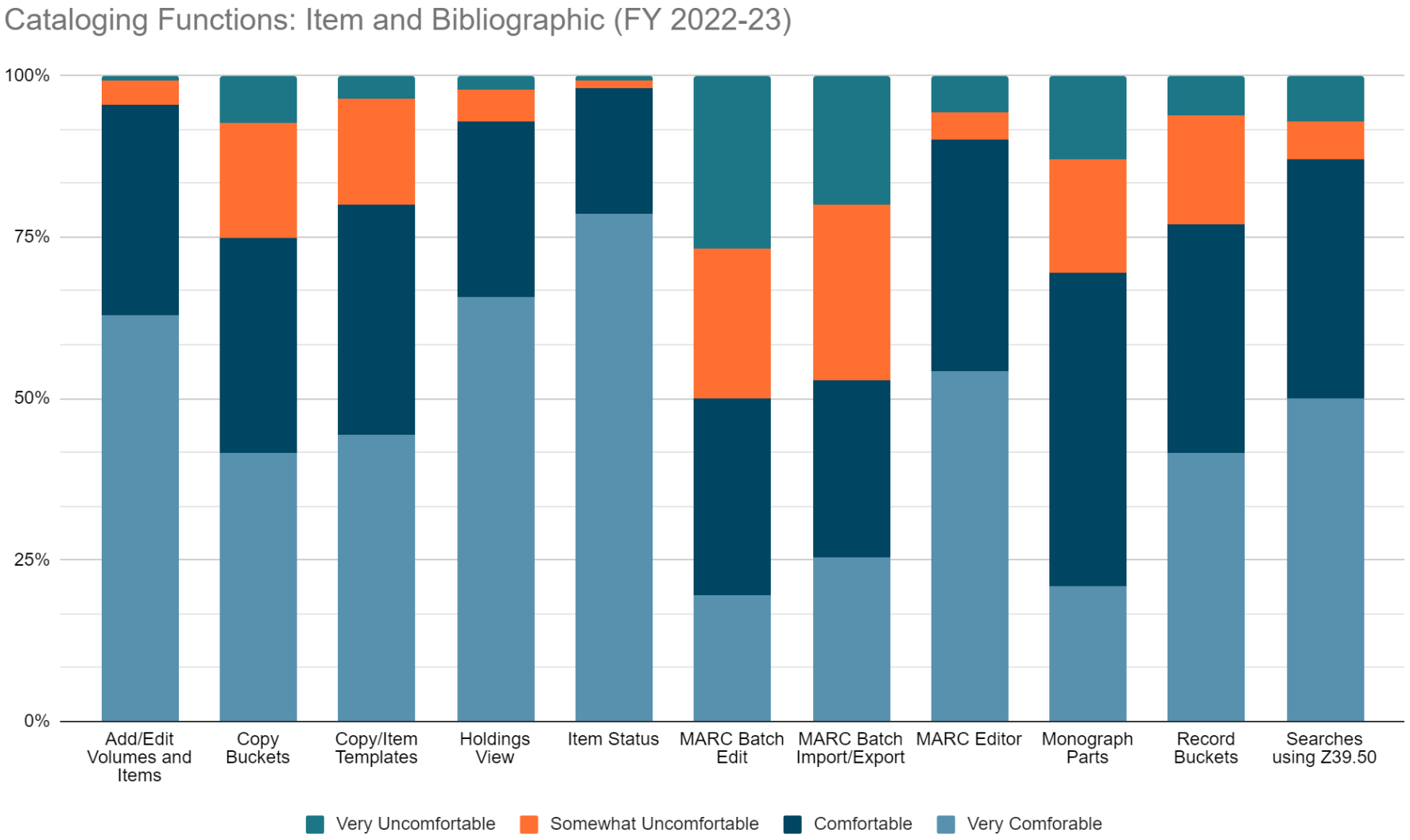
Staff Survey



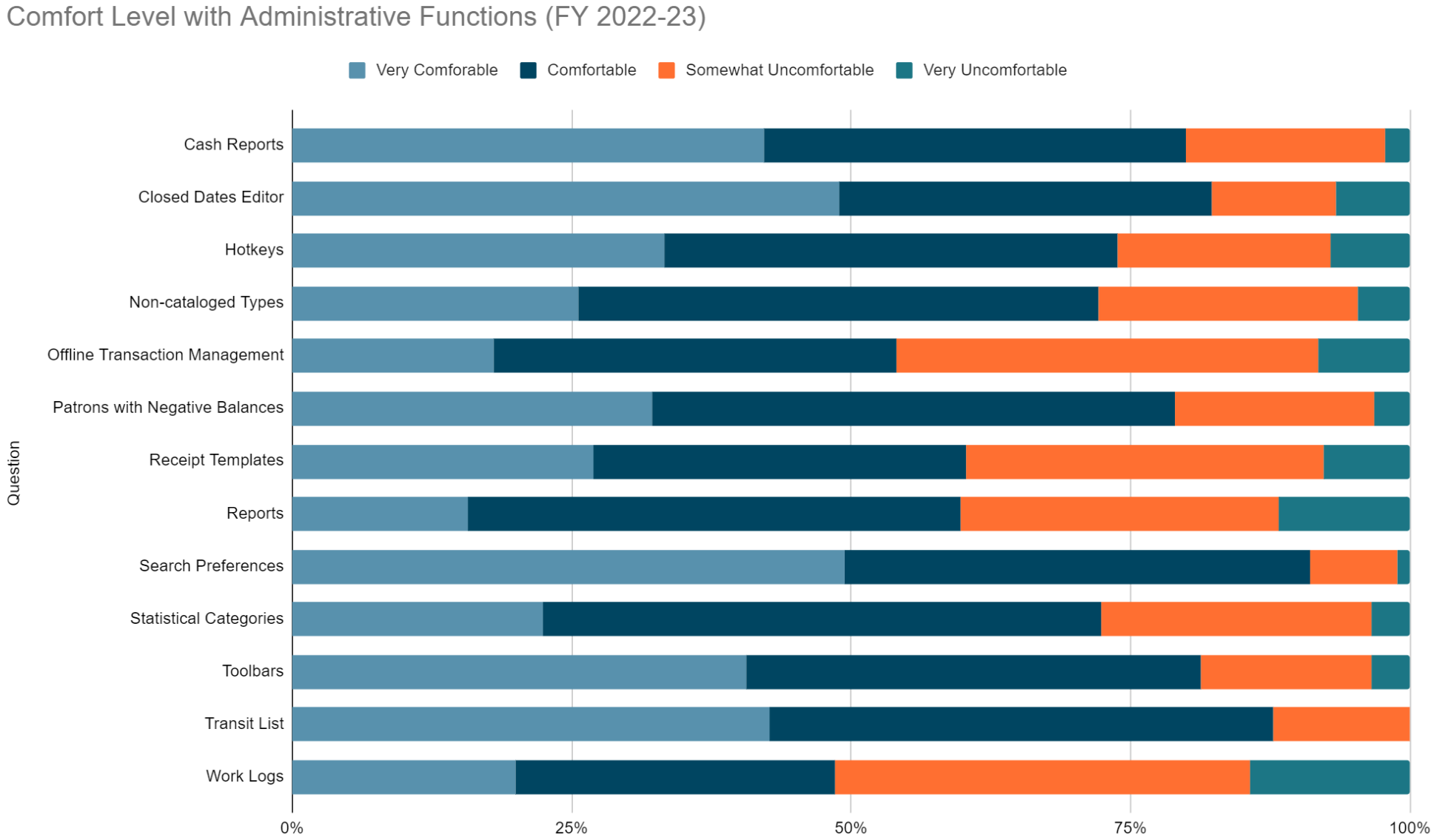
Staff Survey



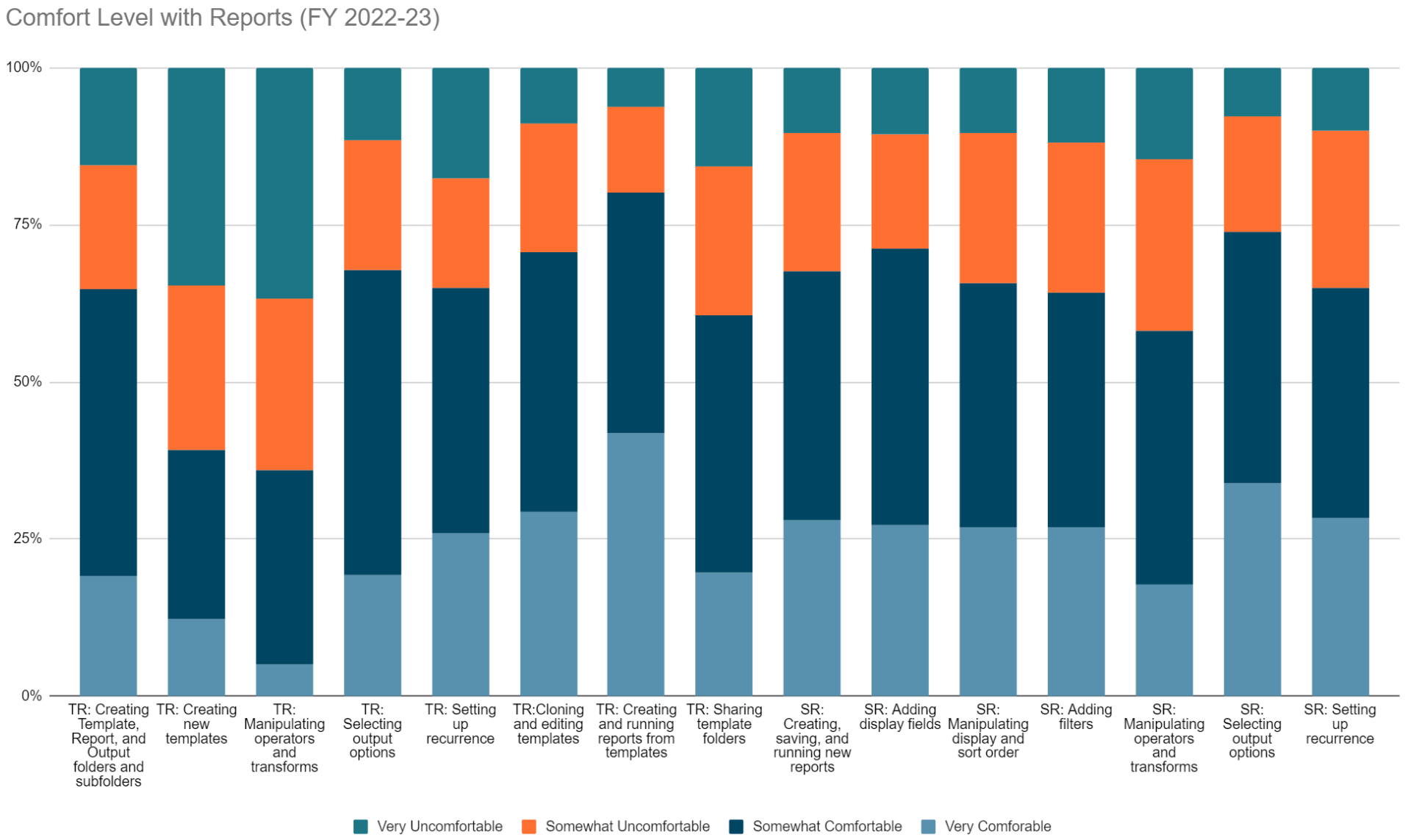
Staff Survey



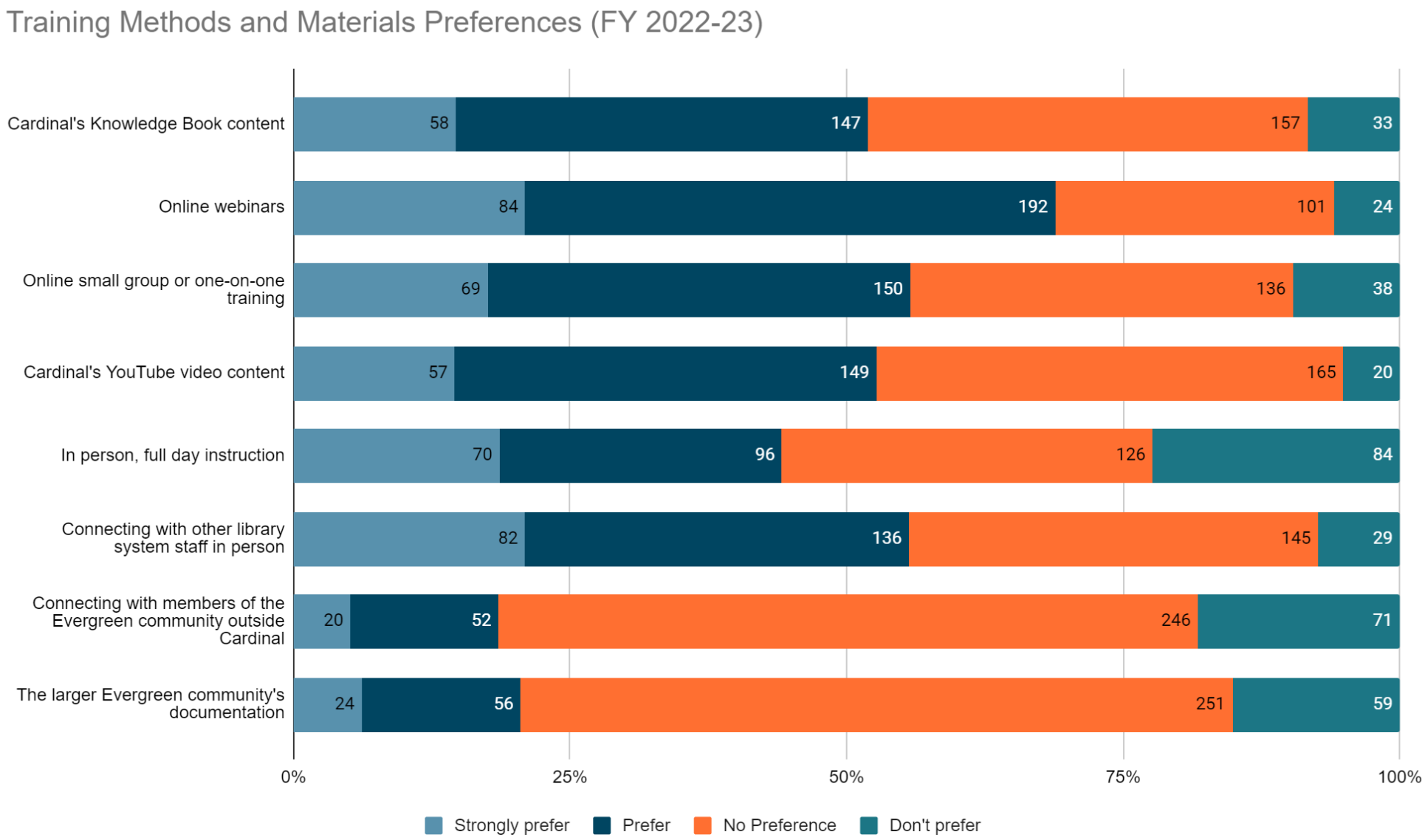
Staff Survey



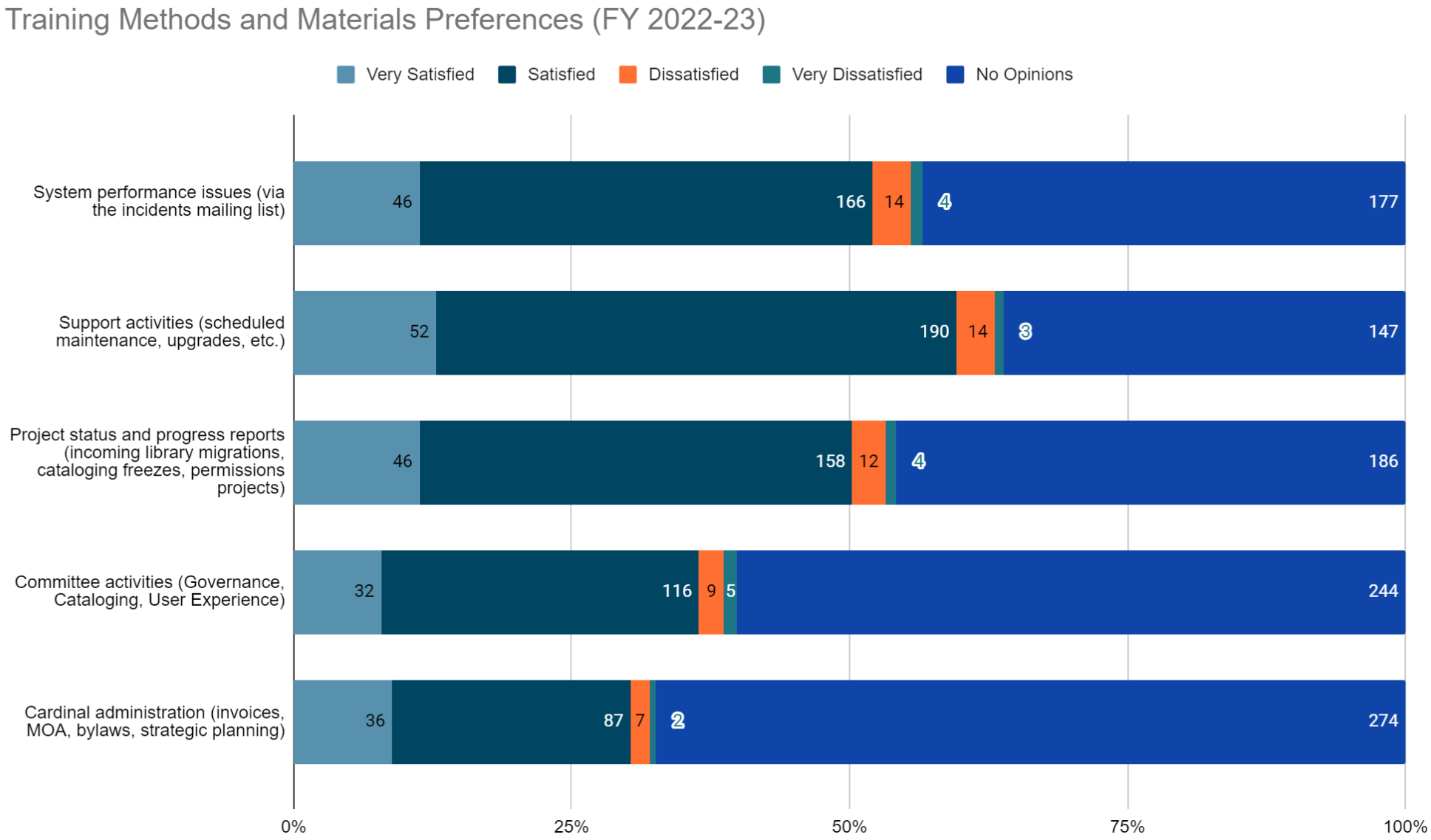
Staff Survey



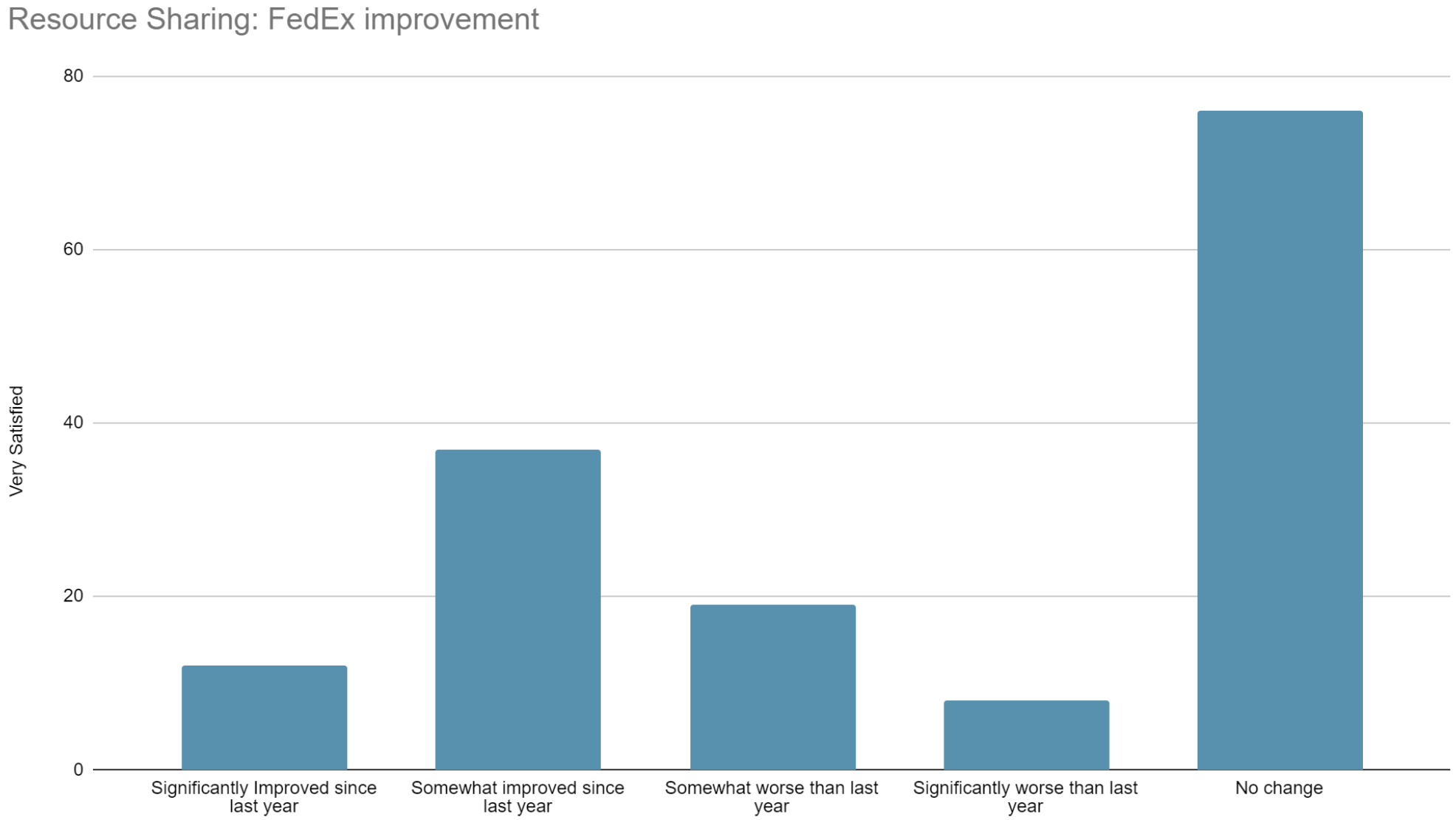
Staff Survey



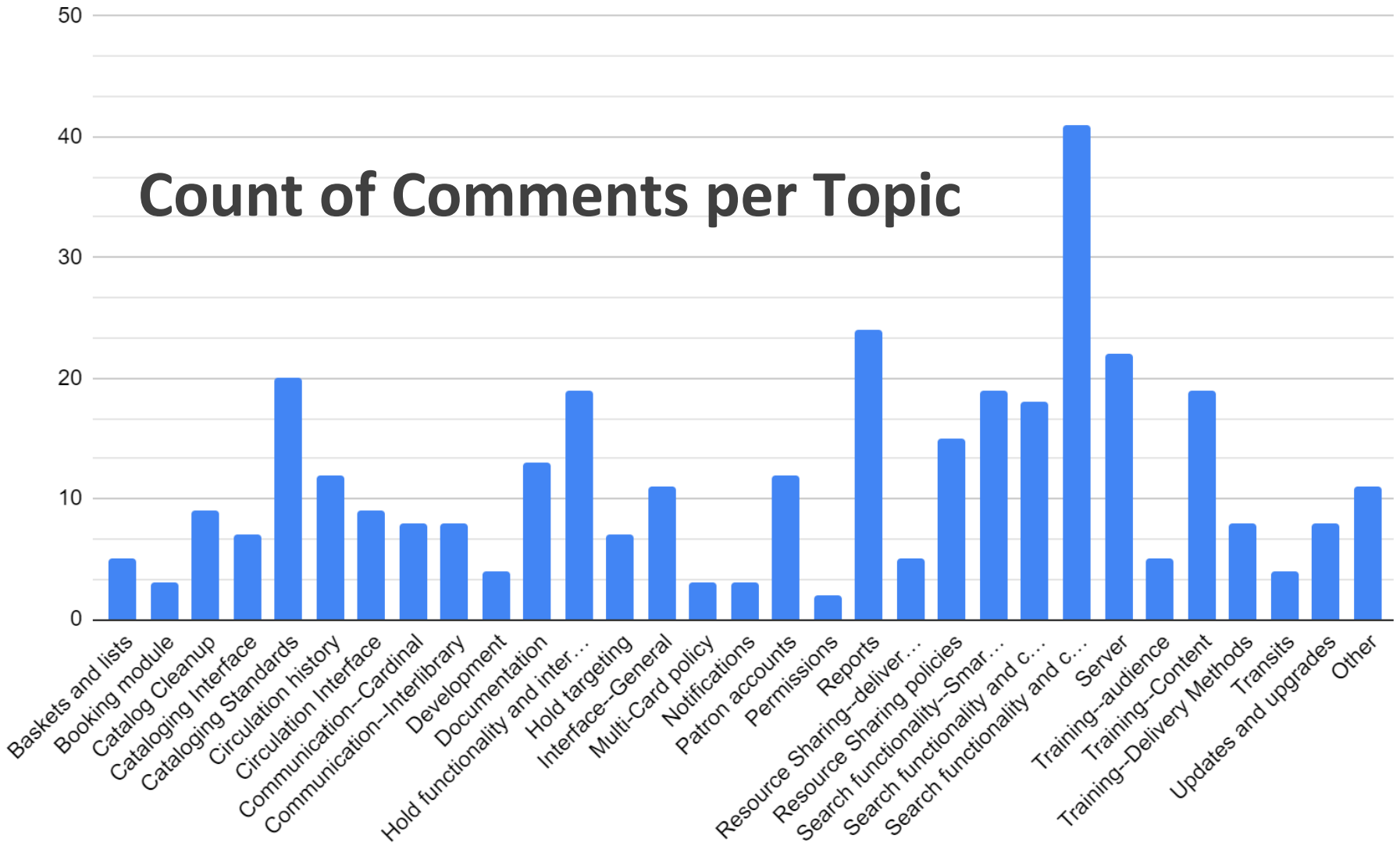
Staff Survey



Staff Survey



Staff Survey



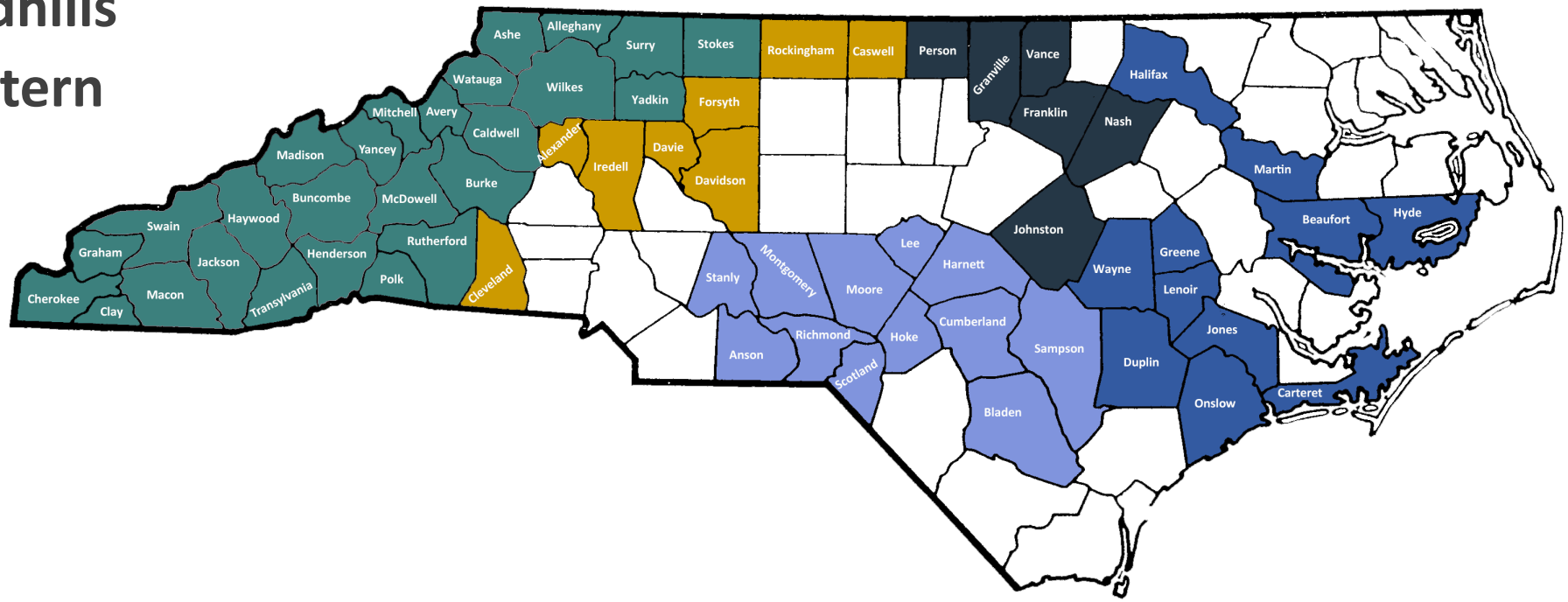
Projects for the Year Ahead

Regional Training Sessions

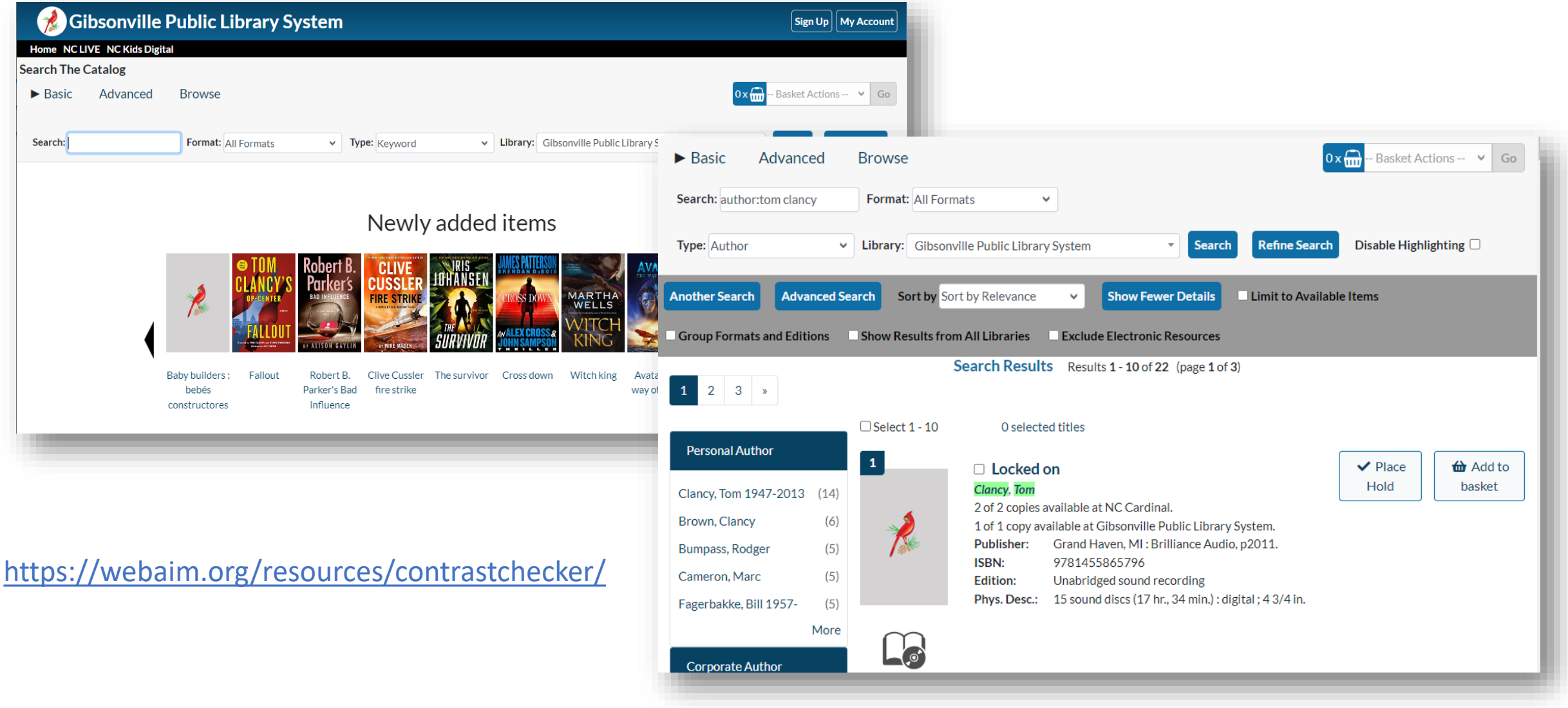
- 5 regions:
  - Eastern
  - North Central
  - Piedmont/Triad
  - Sandhills
  - Western

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

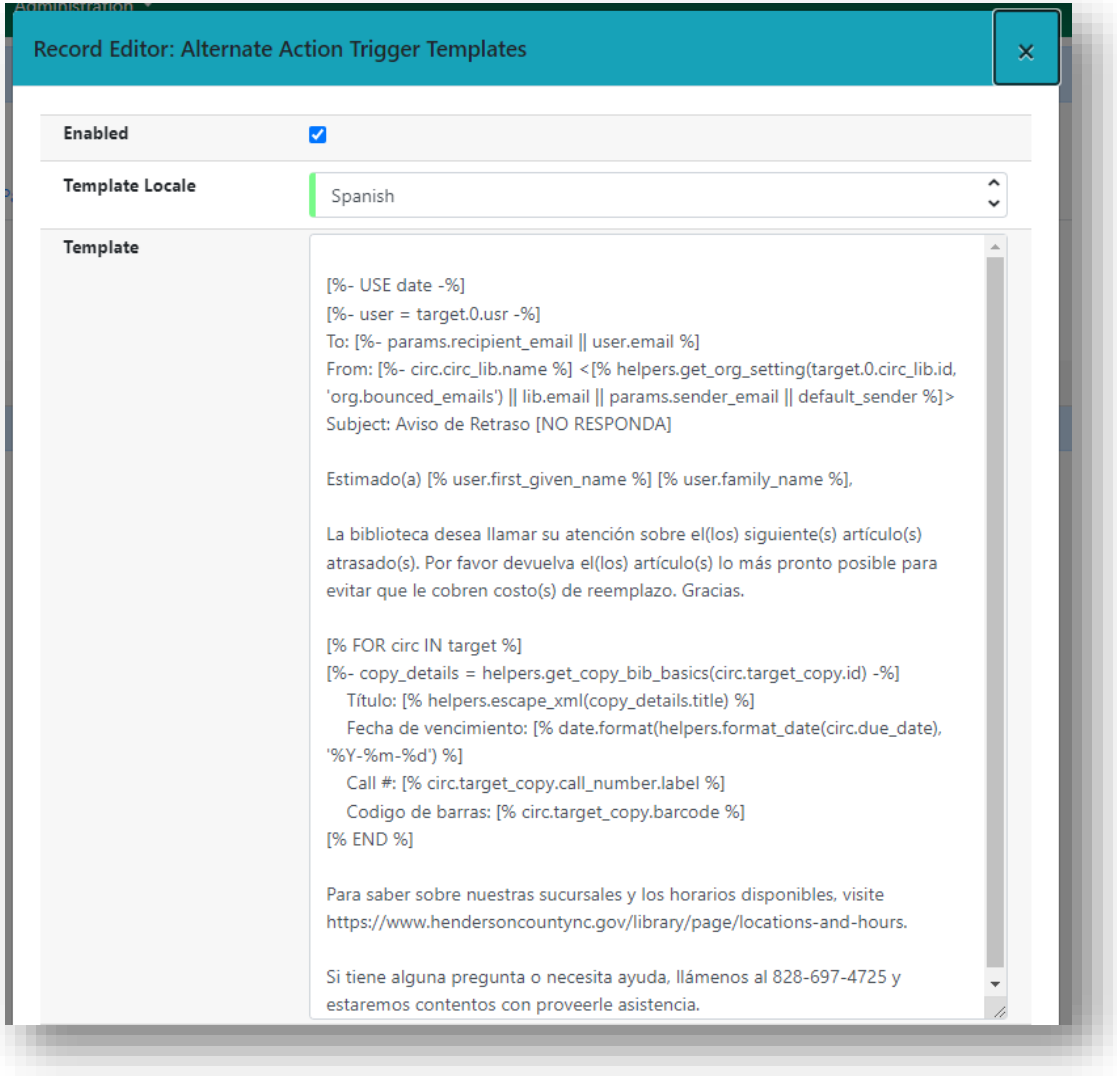


Custom OPAC Colors



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

Alternate Templates



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?