

NC Cardinal

Where We've Been and
Where We're Going



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.



What Has Happened Since Our Last Strategic Plan in 2016?

Growth

SLAMs

Basecamp

OPAC Updates

Knowledge Books

Authority Control

Governance

Best Practices

Web Client

Mobius

Funding Model

Assessments

Staffing Changes

Articulate

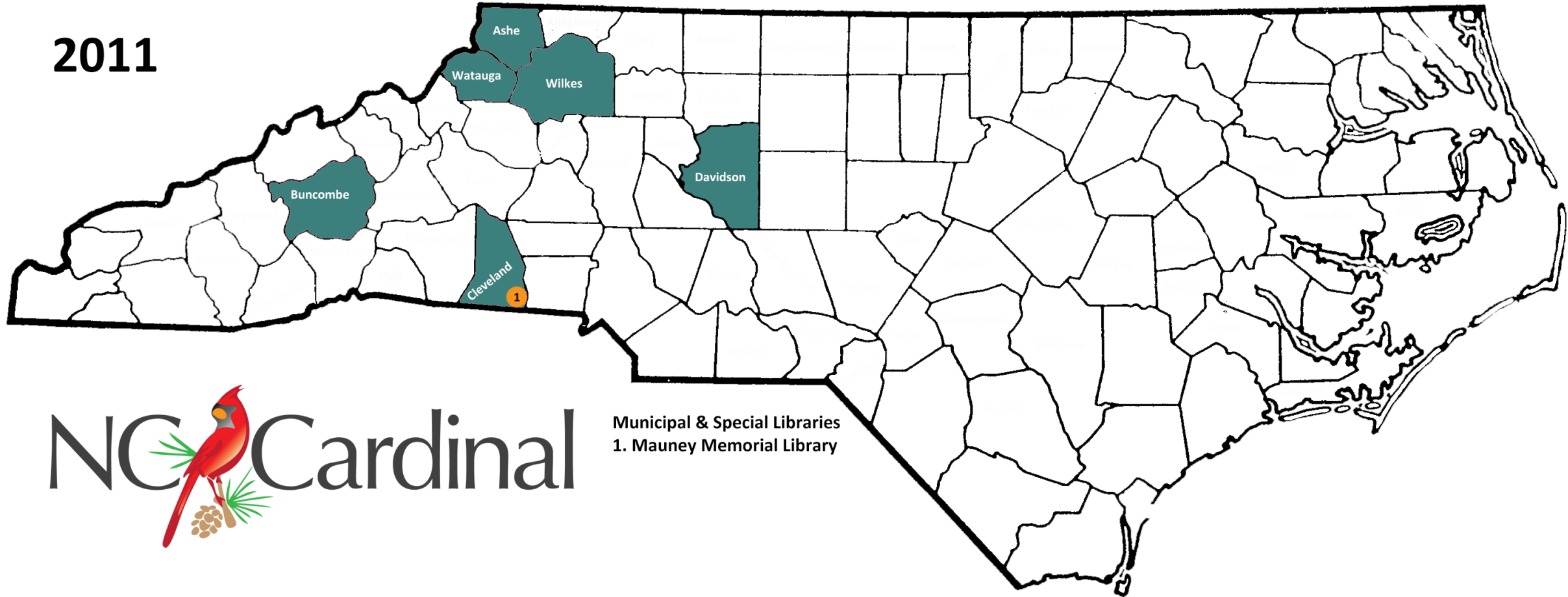
Committees

Clean Up & Consolidation

(Relevant elements of the 2016 Strategic Plan will show up here)

Steady Growth

2011



Task 1.2: Strategically grow membership that balances new migrations into the consortium



With More Growth Comes More Work

2015: Circ Modifier Consolidation

2017: Shelving Location Consolidation

2018: Marcive Authority Control
Summon Discovery Layer

2019: Patron Permission Groups
Print Notices
Staff Permissions and Assessments

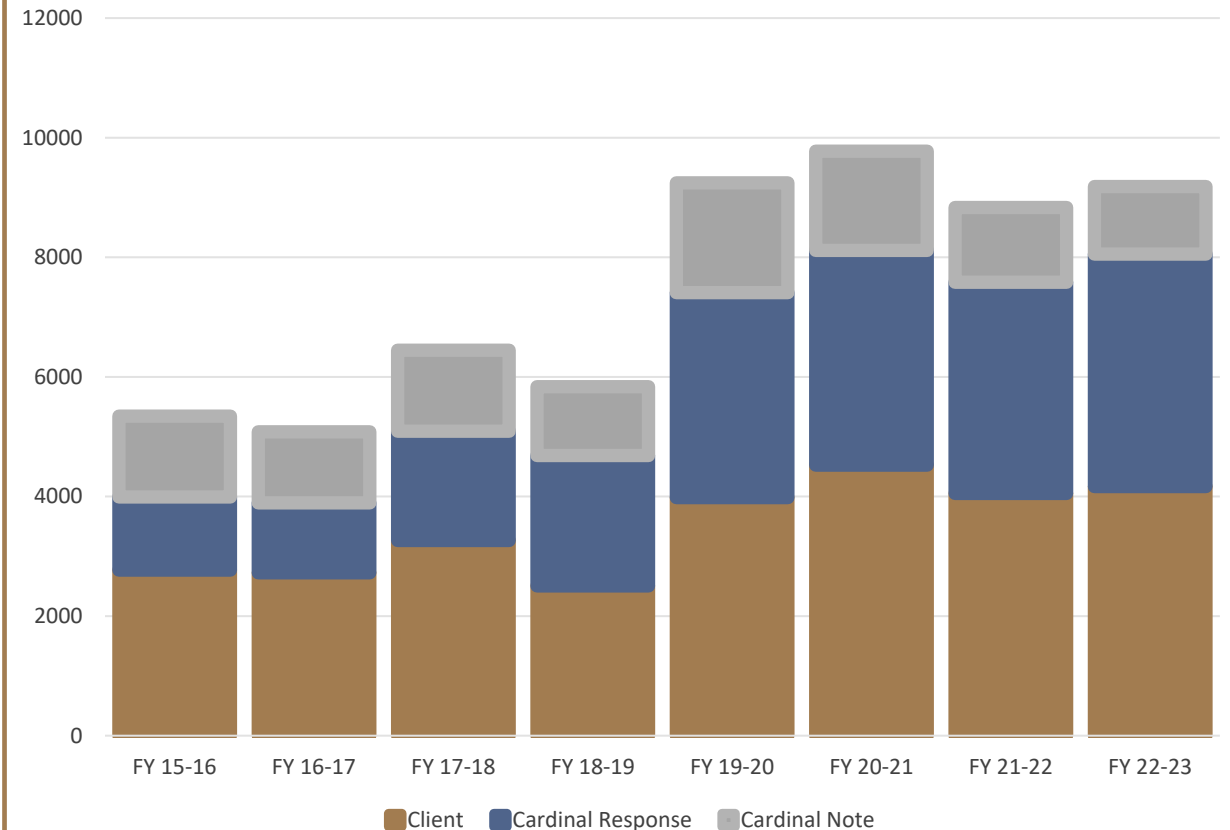
2020: Electronic Resources
Patron Purge

2021: Settings Consultations

2022: Shared Reports Clean Up
Staff Password Resets
Shelving Location Consolidation

2023: Holds Targeter
Orphaned Bibs

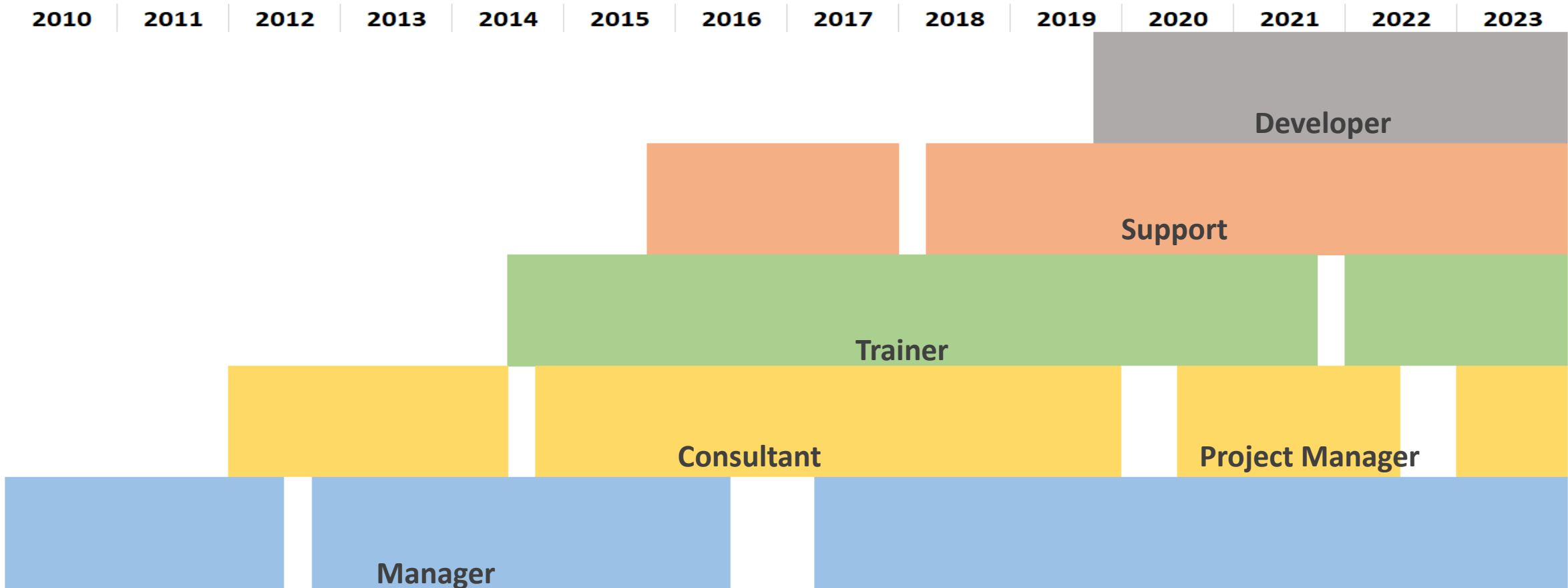
Cardinal Annual Support Ticket Activity



Task 1.2: Strategically grow membership that balances new migrations into the consortium

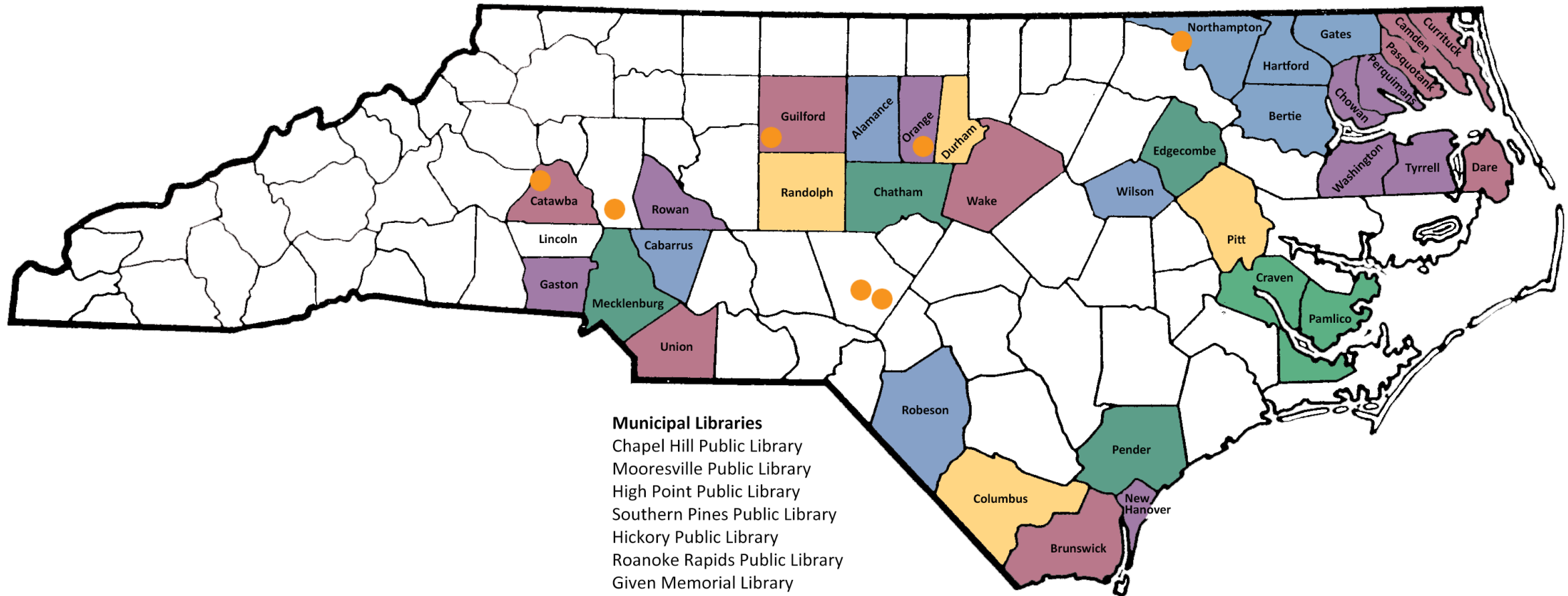


Staffing Changes Over the Years



Task 1.2: Strategically grow membership that balances new migrations into the consortium

Slowing Growth but Growing Complexity



Task 1.2: Strategically grow membership that balances new migrations into the consortium



Milestones Relevant to the 2016 Strategic Plan

Move from Equinox to Mobius



Equinox



Mobius

Task 2.1: Design (staff and patron) experiences that remove barriers, facilitate access to additional resources (e.g. eBooks), and delight users

Move from XUL to Web Client

The XUL interface shows a menu bar at the top with options like File, Edit, Search, Circulation, Cataloging, Acquisitions, and Booking. Below the menu, there are buttons for Check Out, Check In, Search Catalog, Item Status, Patron Search, and Patron Registration. The main area displays the patron's status, including their name, account creation date, and a list of holds. The 'Holds' section is highlighted with a red box, showing a table of holds with columns for #, Available On, Capture Date, Current Copy, Drive-Thru, Last Notify Time, Notices, Pickup Library, Request Date, Status, Title, and Type. The 'Holds' button in the top navigation bar is also highlighted with a red box.

#	Available On	Capture Date	Current Copy	Drive-Thru	Last Notify Time	Notices	Pickup Library	Request Date	Status	Title	Type
1			CONC40000598	Yes		0	BR1	6/6/13 1:49 ...	Waitin...	The five ...	T
2			CONC4400059	Yes		0	BR1	6/6/13 1:48 ...	Waitin...	Comple...	T
3	6/6/13 2:05 PM	6/6/13 2:05 PM	CONC4200074	Yes		0	BR1	6/6/13 1:48 ...	Ready ...	The pian...	T

The Web Client interface shows a top navigation bar with options like Search, Circulation, Cataloging, Acquisitions, Booking, and Administration. Below the navigation bar, there are buttons for Check Out, Items Out (0), Holds (0 / 0), Bills (\$0.00), Notes, Edit, and Other. The main area displays the patron's profile, including their name, account creation date, and a list of holds. The 'Holds' section is highlighted with a red box, showing a table of holds with columns for #, Available On, Capture Date, Current Copy, Drive-Thru, Last Notify Time, Notices, Pickup Library, Request Date, Status, Title, and Type. The 'Holds' button in the top navigation bar is also highlighted with a red box.

#	Available On	Capture Date	Current Copy	Drive-Thru	Last Notify Time	Notices	Pickup Library	Request Date	Status	Title	Type
1			CONC40000598	Yes		0	BR1	6/6/13 1:49 ...	Waitin...	The five ...	T
2			CONC4400059	Yes		0	BR1	6/6/13 1:48 ...	Waitin...	Comple...	T
3	6/6/13 2:05 PM	6/6/13 2:05 PM	CONC4200074	Yes		0	BR1	6/6/13 1:48 ...	Ready ...	The pian...	T

Task 2.1: Design (staff and patron) experiences that remove barriers, facilitate access to additional resources (e.g. eBooks), and delight users

Updates to OPAC Design & Accessibility

The screenshot displays the NC Cardinal OPAC interface. The top navigation bar includes links for Home, Help, Kid Search, WCPL, NC LIVE, and Optimal Results. A search bar is present with a 'Search' button and a 'Type: Keyword' dropdown. The main content area shows search results for 'Harry Potter and the goblet of fire' by J.K. Rowling. The results are displayed in a list format with a table of library holdings. The interface is designed to be accessible, with clear labels and a structured layout.

Search Results Results 1 - 10 of 12 (page 1 of 2)

☐ Select 1 - 10 0 selected titles

1 ☐ **Harry Potter and the goblet of fire**

Rowling, J. K.
29 of 51 copies available at NC Cardinal.
2 of 5 copies available at Buncombe County Library.
Publisher: New York, NY : Arthur A. Levine Books, an imprint of Scholastic Inc., 2019.
ISBN: 9780545791427
Edition: First illustrated edition.
Phys. Desc.: 451 pages : color illustrations ; 28 cm

BOOK

Library	Shelving location	Call number	Status
Oakley/South Asheville Library	Juvenile Fiction	J ROW	Available
Pack Memorial Library	Juvenile Fiction	J ROW	Available
Black Mountain Library	Juvenile New Fiction	J ROW	Checked out
East Asheville Library	Juvenile Fiction	J ROW	In transit
North Asheville Library	Juvenile Fiction	J ROW	Checked out

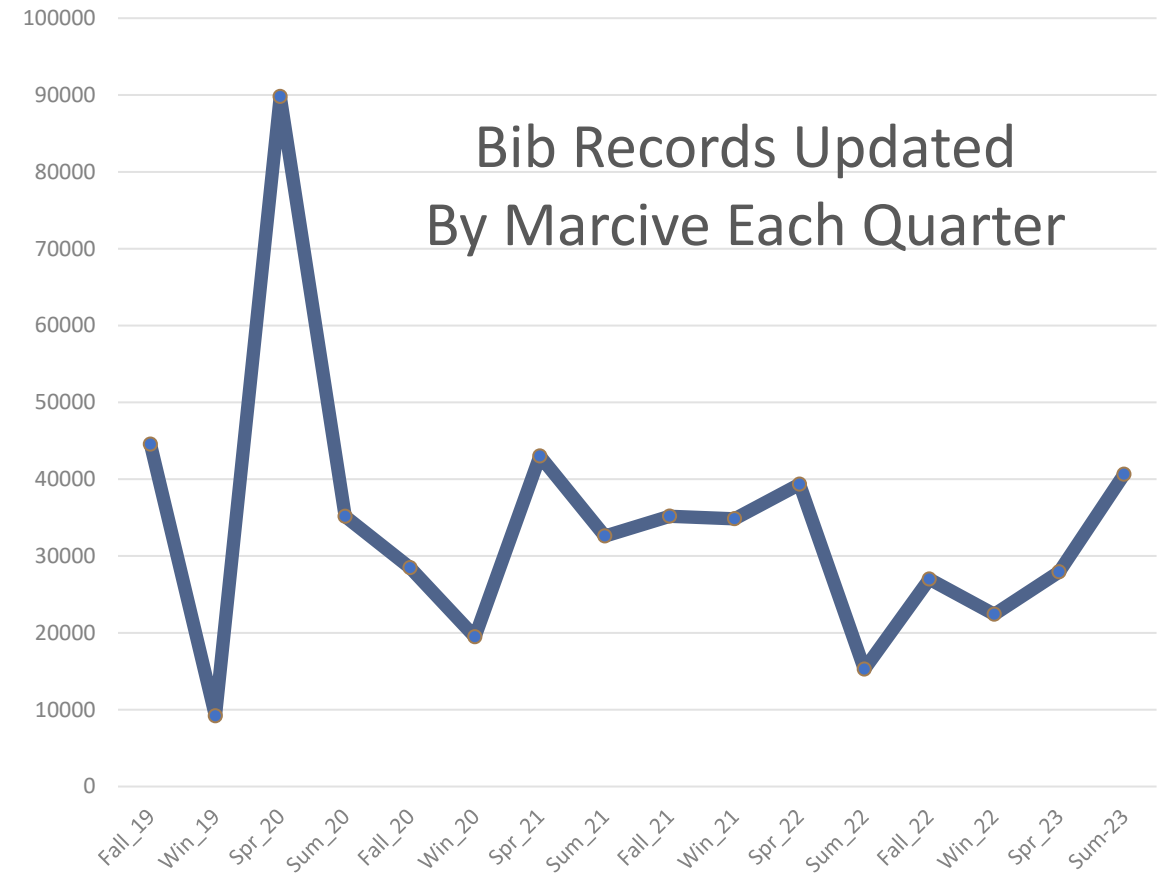
2 ☐ **Harry Potter and the goblet of fire**

Rowling, J. K.

Task 2.1: Design (staff and patron) experiences that remove barriers, facilitate access to additional resources (e.g. eBooks), and delight users

Implementation of Authority Control with Marcive

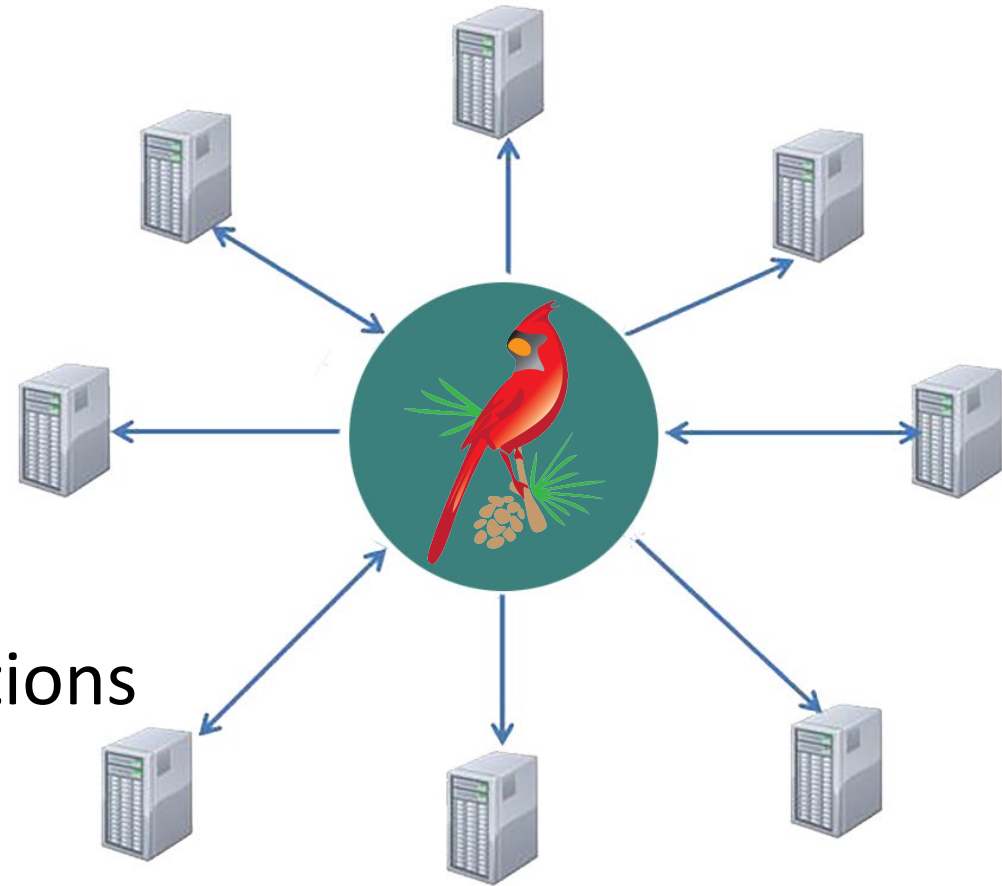
```
600 1 0   +a Martin, George R. R. +v Television adaptations.
650 0   +a Kings and rulers +v Drama. #0 (CARDINAL)441306
650 0   +a Nobility +v Drama.
650 0   +a Imaginary wars and battles +v Drama.
655 7   +a Fantasy television programs. #2 lcgft #0 (CARDINAL)692390
655 7   +a Action and adventure television programs. #2 lcgft #0 (CARDINAL)340107
655 7   +a Fiction television programs. #2 lcgft #0 (CARDINAL)340108
655 7   +a Television adaptations. #2 lcgft #0 (CARDINAL)340108
655 7   +a Television programs. #2 lcgft #0 (CARDINAL)305276
655 7   +a Television series. #2 lcgft #0 (CARDINAL)340104
655 7   +a Video recordings for the hearing impaired. #2 lcgft #0 (CARDINAL)340104
700 1   +a Benioff, David, +e creator, +e television producer, +e screenwriter. :
700 1   +a Weiss, D. B. +e creator, +e television producer, +e screenwriter.
700 1   +a Martin, George R. R. +e television producer, +e screenwriter. #0 (CARDINAL)340104
700 1   +a Gerardis, Vince, +e television producer.
700 1   +a Vicinanza, Ralph, +d 1950-2010, +e television producer.
700 1   +a Casady, Guymon, +e television producer. #0 (CARDINAL)340049
700 1   +a Strauss, Carolyn, +e television producer.
700 1   +a Huffam, Mark, +e television producer.
700 1   +a Burn, Joanna, +e television producer.
```



Task 2.1: Design (staff and patron) experiences that remove barriers, facilitate access to additional resources (e.g. eBooks), and delight users

Additional Service Offerings

- EBSCO Novelist
- ExLibris Summon
- LibraryIQ
- LibraryHQ
- PatronPoint
- MyLibro
- Unique Management Collections
- Wowbrary



Task 2.2: Explore additional service offerings based upon member needs and interests

Knowledge Books

Acquisitions in Evergreen

This is a living document that incorporates elements of Evergreen Documentation. As new topics arise, this document will be amended. If you have any questions or suggestions, please contact the NC Cardinal community.

- [1. Training and Learning](#)
 - [1.1. NC Cardinal resources](#)
 - [1.2. External Resources](#)
- [2. Acquisitions Basics](#)
 - [2.1. Getting Started](#)
 - [2.2. Acquisition Workflow](#)
 - [2.3. Acquisitions Process](#)
 - [2.4. Definitions](#)
- [3. Acquisitions Administration](#)
 - [3.1. Searching in Acquisitions](#)
 - [3.2. Funding Sources](#)
 - [3.3. Funds](#)
 - [3.4. Providers](#)
 - [3.5. Cancel/Delay Requests](#)
 - [3.6. Claiming](#)
 - [3.7. Currency Types](#)
 - [3.8. Distribution Formats](#)
 - [3.9. Electronic Data Interchange](#)
 - [3.10. Exchange Rates](#)
- [4. Selection Lists and Purchasing Orders](#)

Reports in Evergreen

Documentation of the reporting process in Evergreen.

This is a living document that incorporates elements of Evergreen Documentation. As new topics arise, this document will be amended. If you have any questions or suggestions, please contact the NC Cardinal community.

- [1. Introduction to Reports](#)
 - [1.1. Reports Overview](#)
 - [1.2. Reports Permissions](#)
- [2. Simple Reports](#)
 - [2.1. Differences between Simple and Advanced Reports](#)
 - [2.2. Simple Reports Interface](#)
 - [2.3. Types of Simple Reports](#)
 - [2.4. Creating a Simple Report](#)
 - [2.5. Editing a Simple Report](#)
 - [2.6. Administration](#)
- [3. Folders](#)
 - [3.1. What Are Report Folders?](#)
 - [3.2. Creating Folders](#)
 - [3.3. Managing Folders](#)
- [4. Pre-existing Templates](#)

Administration Manual for Libraries

Instructions for utilizing the administration interface in Evergreen.

This is a living document that incorporates elements of Evergreen Documentation. As new topics arise, this document will be amended. If you have any questions or suggestions, please contact the NC Cardinal community.

- [1. Managing Evergreen Staff](#)
 - [1.1. Purpose of Login Accounts](#)
 - [1.2. Staff Permission Groups](#)
 - [1.3. System Login Accounts](#)
 - [1.4. Creating a New Login Account](#)
 - [1.5. Transferring Report Permissions](#)
 - [1.6. Transferring Item Types](#)
 - [1.7. Disabling Staff Logins](#)
 - [1.8. How to Change the Password](#)
- [2. Client & Workstation Setup](#)
 - [2.1. Network Requirements](#)
 - [2.2. Should You Use Hatchbox?](#)
 - [2.3. If You Use Hatchbox](#)

Circulation in Evergreen

This is a living document that incorporates elements of Evergreen Documentation. As new topics arise, this document will be amended. If you have any questions or suggestions, please contact the NC Cardinal community.

- [1. Logging into Evergreen](#)
 - [1.1. Logging in and out](#)
 - [1.2. Registering a Workstation](#)
 - [1.3. Add Additional Workstation](#)
 - [1.4. Change Operator](#)
- [2. Best Practices for Using the Browser](#)
 - [2.1. Setting Browser Defaults](#)
 - [2.2. Pop-up Blockers](#)
 - [2.3. Tab Buttons and Keyboard](#)
 - [2.4. Clearing your cache](#)
- [3. Configuring Evergreen for your Vendors](#)
 - [3.1. Setting Search and Sound](#)
 - [3.2. Setting Print](#)

Cataloging in NC Cardinal

This living document outlines and provides best practices for cataloging in NC Cardinal. As new topics arise, this document will be amended. If you have any questions or suggestions, please contact the NC Cardinal community.

This document incorporates elements of Evergreen Documentation.

- [1. Cataloging Overview](#)
 - [1.1. Cataloging Permission Requirements](#)
 - [1.2. Important Changes, Reminders, and Updates](#)
 - [1.3. Cataloging Workflow](#)
 - [1.4. Record Structure in Evergreen](#)
 - [1.5. Evaluating Bibliographic Records](#)
 - [1.6. Cataloging Etiquette](#)
 - [1.7. RDA vs AACR2](#)
- [2. Item Cataloging](#)

Task 3.4: Leverage expertise and best practices by building a knowledgebase that strengthens the NC Cardinal community

Admin Manual and SLAMs

Administration Manual for Libraries

Instructions for utilizing the administrative functions in Evergreen for NC Cardinal library admin staff.

This is a living document that incorporates many elements of Evergreen Community Documentation and share under the same license.

[1. Managing Evergreen Staff Login Access Accounts](#)

- [1.1. Purpose of Login Access Accounts](#)
- [1.2. Staff Permission Groups](#)
- [1.3. System Login Access Managers](#)
- [1.4. Creating a New Login Access Account](#)
- [1.5. Transferring Report Templates](#)
- [1.6. Transferring Item Templates](#)
- [1.7. Disabling Staff Login Access Accounts](#)
- [1.8. How to Change the Password on your Evergreen Login Account](#)

[2. Client & Workstation Setup and Administration](#)

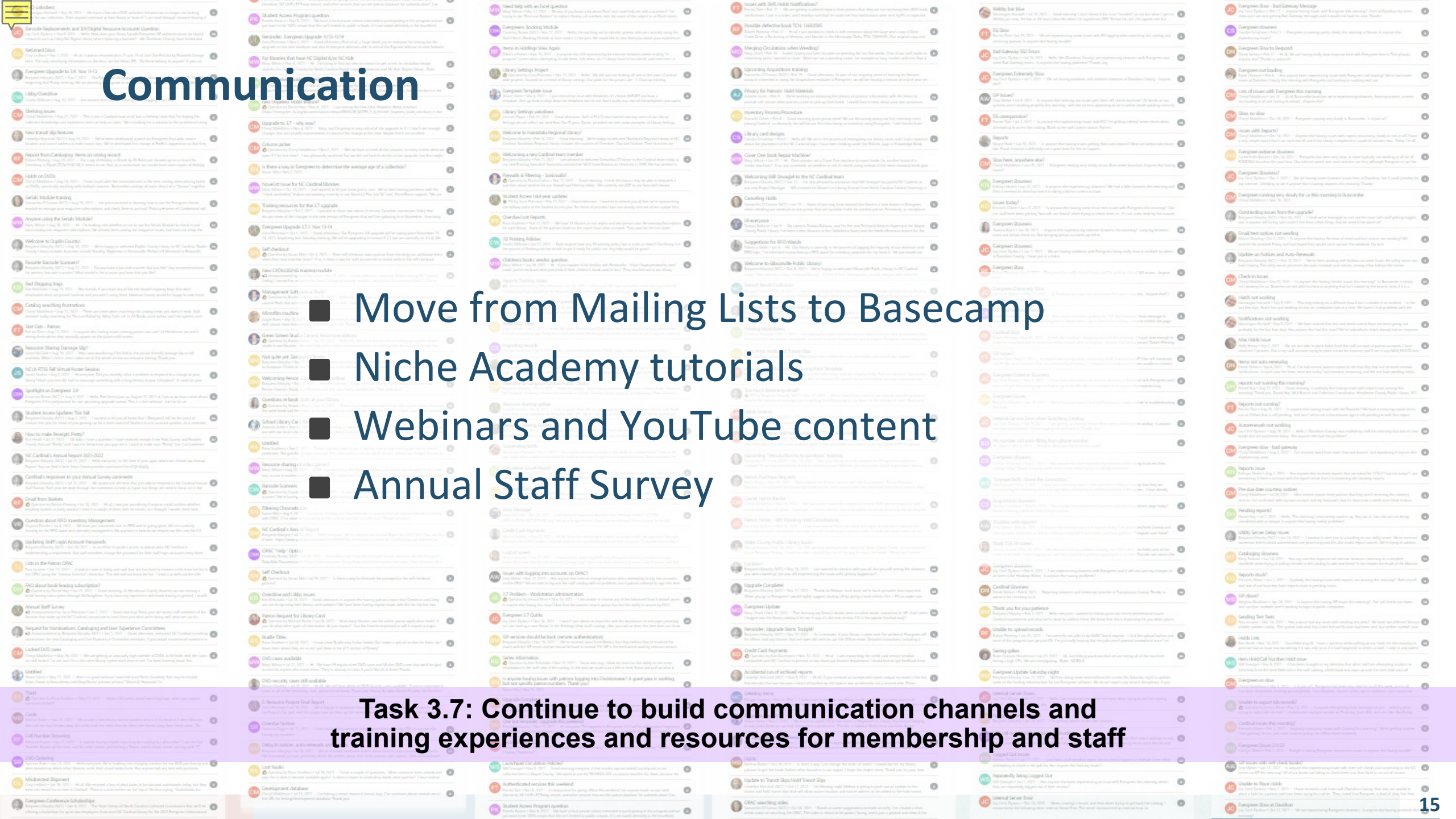
- [2.1. Network Requirements](#)
- [2.2. Should You Use Hatch with the Web Client?](#)
- [2.3. If You Use Hatch](#)
- [2.4. Setting Up Your Receipt Printers](#)
- [2.5. Printed Hold Pull List Print Template Configurations](#)
- [2.6. Setting Up a Label Printer](#)



As your library's designated System Access Login Manager, you are responsible for the login accounts staff at your library will use to access the staff client on Evergreen.

This module will help you learn more about this responsibility and why it's important, how to set up accounts, how to manage accounts, and how to work with the NC Cardinal team to keep them up to date.

Task 3.5: Assess service delivery support operations and provide more self-service administration tools



Communication

- Move from Mailing Lists to Basecamp
- Niche Academy tutorials
- Webinars and YouTube content
- Annual Staff Survey

Task 3.7: Continue to build communication channels and training experiences and resources for membership and staff



Community Engagement and Partnerships

Task 4.3: Develop additional opportunities for member and NC Cardinal staff to participate in the Evergreen and open source communities

Task 5.1: Form collaborative partnerships that increase benefit to member libraries and their communities, leveraging public investment in libraries

Task 5.2: Build strategic alliances with service providers and other consortia to increase awareness of services available and fluidity in service delivery to public libraries

Resource Sharing Improvements

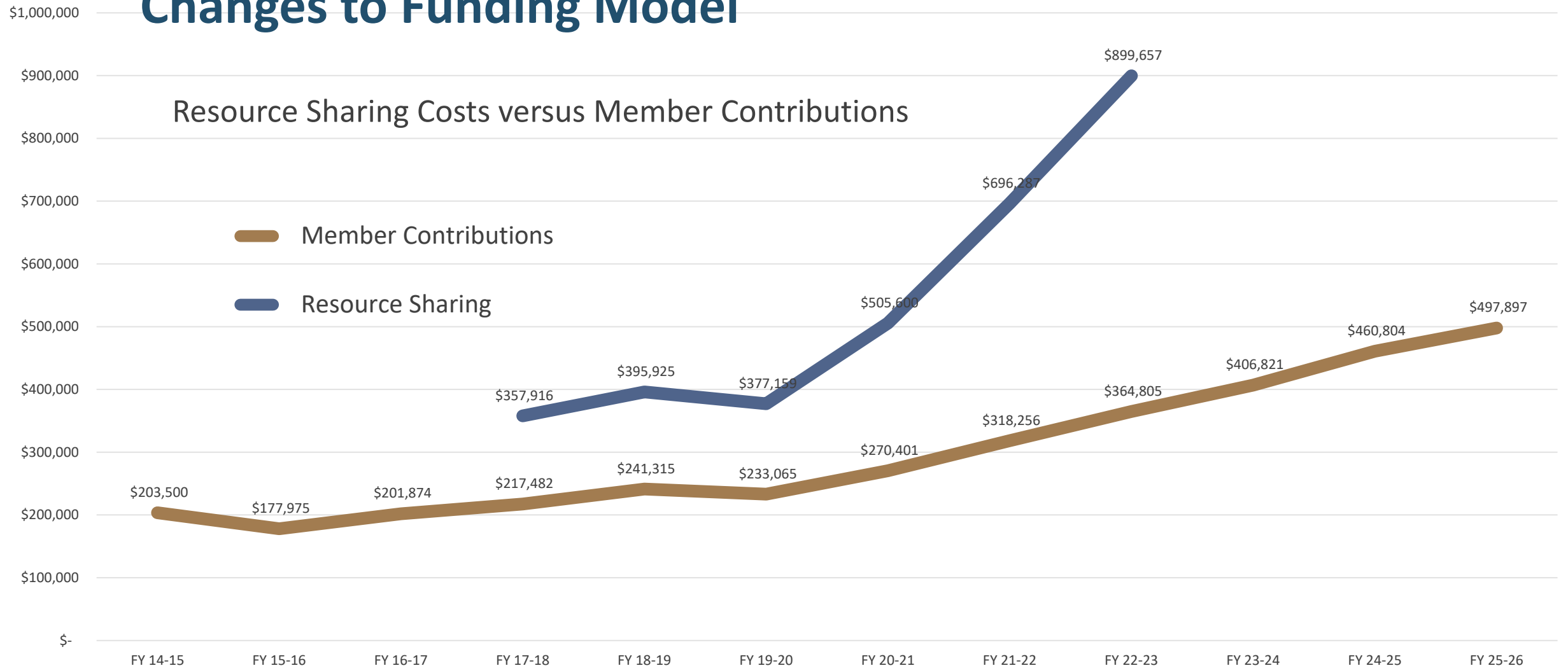


Task 3.8: Refine resource sharing operations and practices to optimize cost and benefit



Changes to Funding Model

Resource Sharing Costs versus Member Contributions



Task 3.3: Build an operational and funding model that incrementally creates organizational self-sustainability

Governance



Task 3.2: Expand governance capacity by diversifying the committee and convening advisory forums

Developing Policies and Best Practices



2.1. Resource Sharing Best Practices

Policies and Procedures

General Policies

- Circulations will follow the policy of the library where they are checked out at, regardless of whether the
- When thinking of Cardinal resource sharing, it is important to remember that an NC Cardinal patron is a
- Holds may be placed on books, videos, audiobooks and music from any NC Cardinal library. Each library may be 1) holdable or 2) non-holdable for a specific length of time, for example, six months.
- If a patron presents the on-hold item for checkout before it is retrieved for the requesting hold patron, the house patron. The requesting hold patron will remain in line for the item. Patrons whose NC Cardinal card
- If you would like to put something on hold for one of your Staff or Outreach accounts that have a longer
- If one of your patrons lost an item that was borrowed through resource sharing, it is best to check with the owning library. If your patron loses an item borrowed through resource sharing. You may wish to refer to this [page](#) for instructions are provided. If a patron replaces a lost or damaged item with an exact copy (same ISBN), the patron to keep the damaged copy.
- It is always preferable to put the patron in contact with the owning library so they can pay that library directly for the damaged or lost item owned by another system.
- Patrons may return any borrowed item to any member library for transit back to the owning library.

Task 4.1: Formalize existing committees and create new committees to address standard practices and policies as well as user interfaces and patron experiences



Where do we grow from here?

Growth	SLAMs	Basecamp	OPAC Updates
Knowledge Books		Authority Control	Governance
Best Practices	Web Client	Mobius	Funding Model
Assessments	Staffing Changes	Articulate	
Committees		Clean Up & Consolidation	



Communication within Cardinal

Cardinal policy making processes

Supporting staff using Evergreen

Service to members of the public