SLNC NC Research. Library Support. Talking Books.



NC Cardinal

9th Annual Report: FY 2020-2021

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

Year In Review



The Cardinal Team



Courtney Brown
NC Cardinal Systems Librarian

Benjamin Murphy
NC Cardinal Program Manager



April Durrence
NC Cardinal Training Specialist



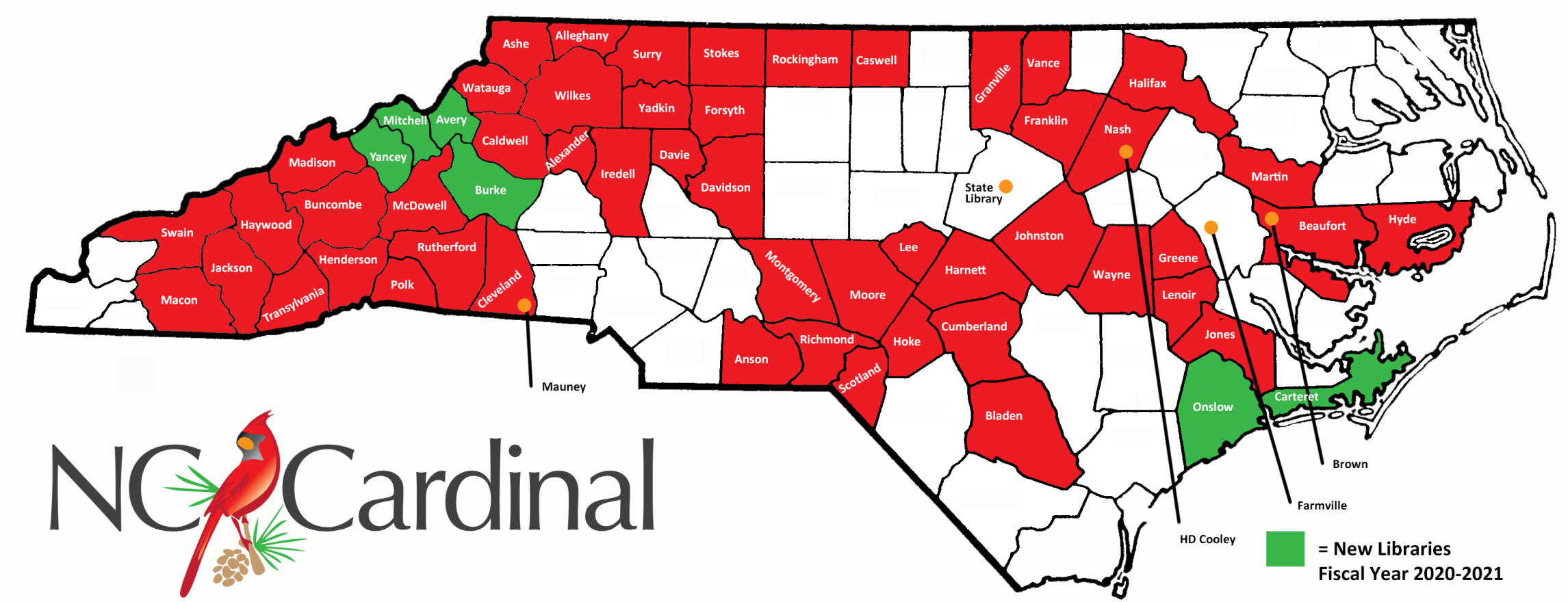


Llewellyn Marshall
NC Cardinal Application Administrator / Developer

Anna Peitzman
NC Cardinal Project Manager



NC Cardinal in 2020-2021

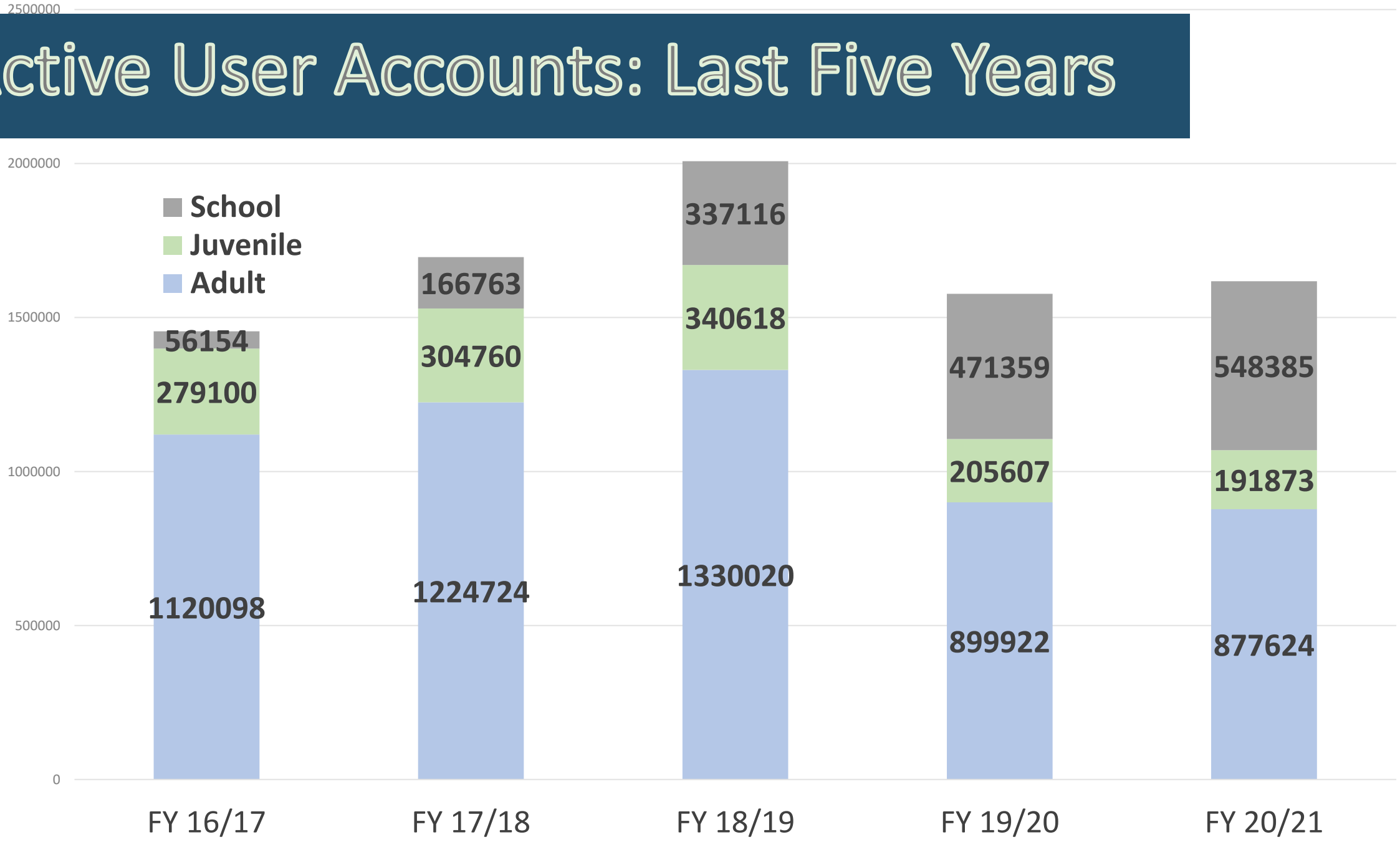


NC Cardinal

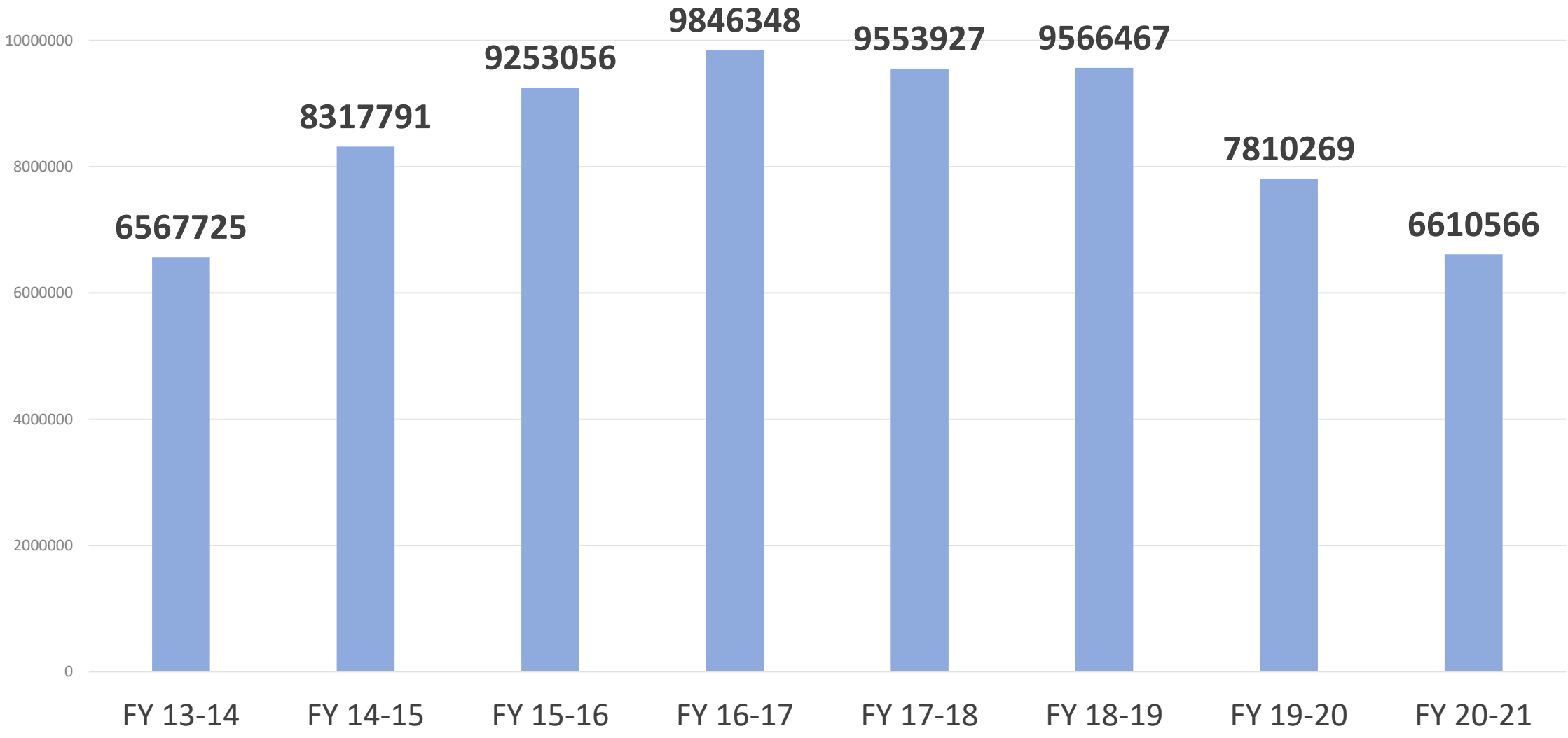
50 counties, 4 municipalities, 7 Special Libraries
183 branches

56 counties, 4 municipalities, 7 Special Libraries
202 branches

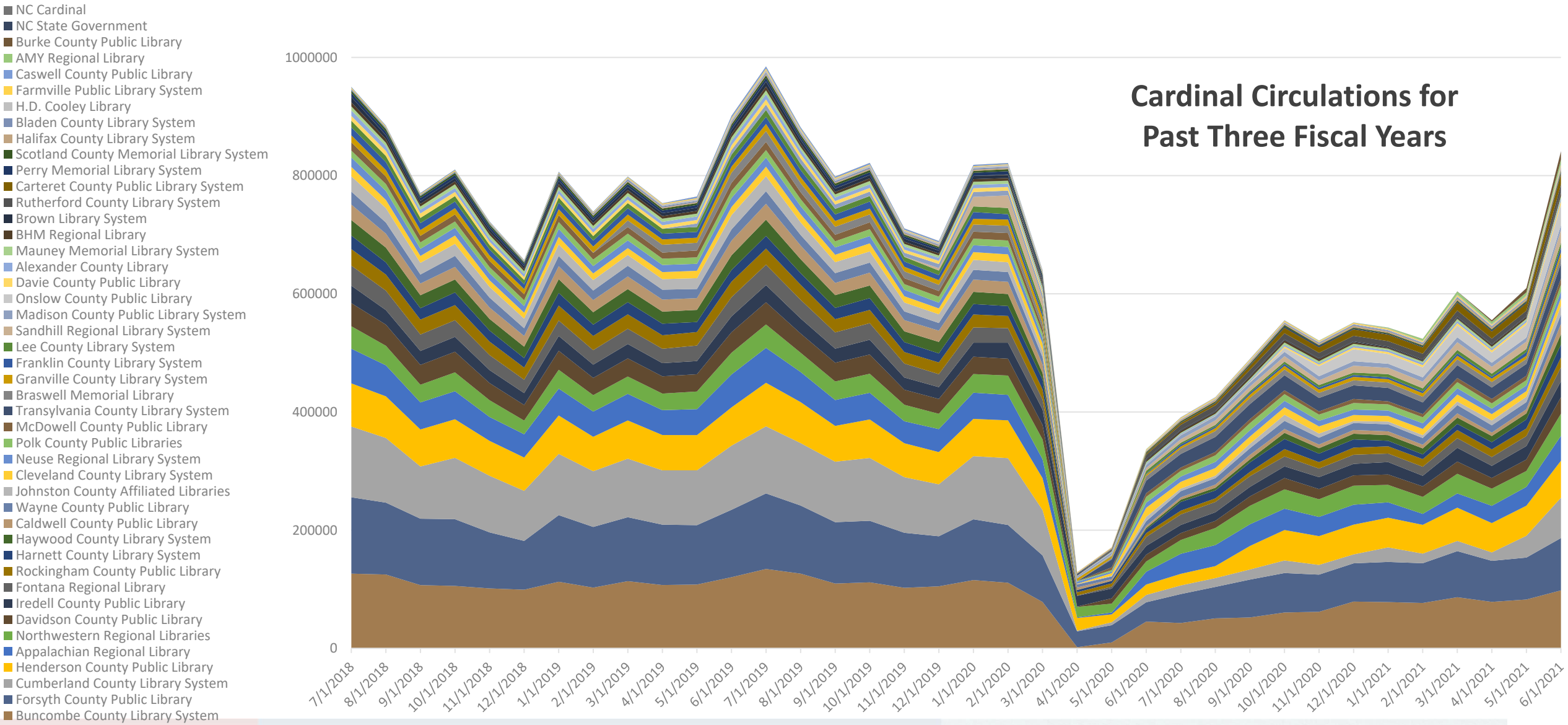
Active User Accounts: Last Five Years



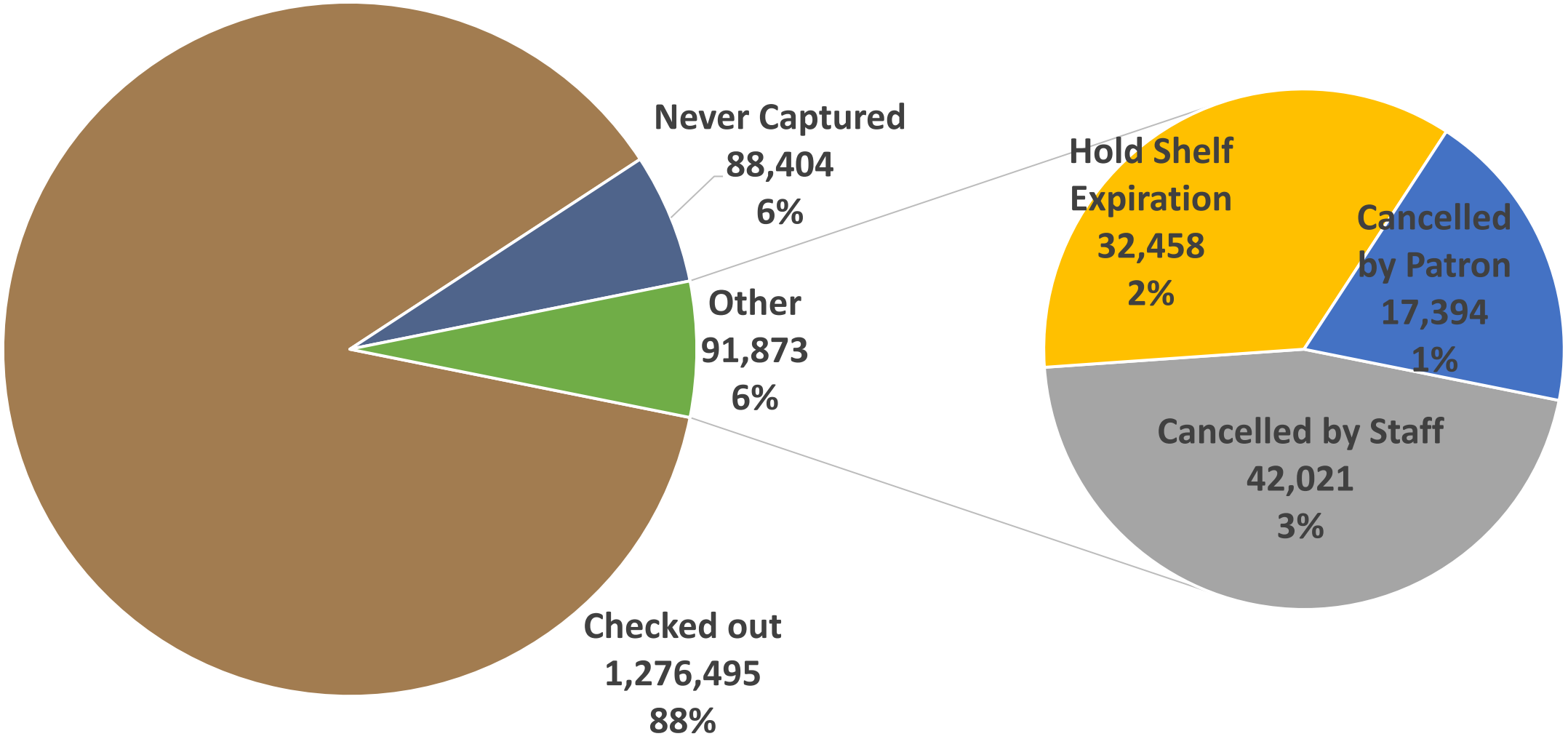
Circulations: Totals



Circulations: Last Three Years

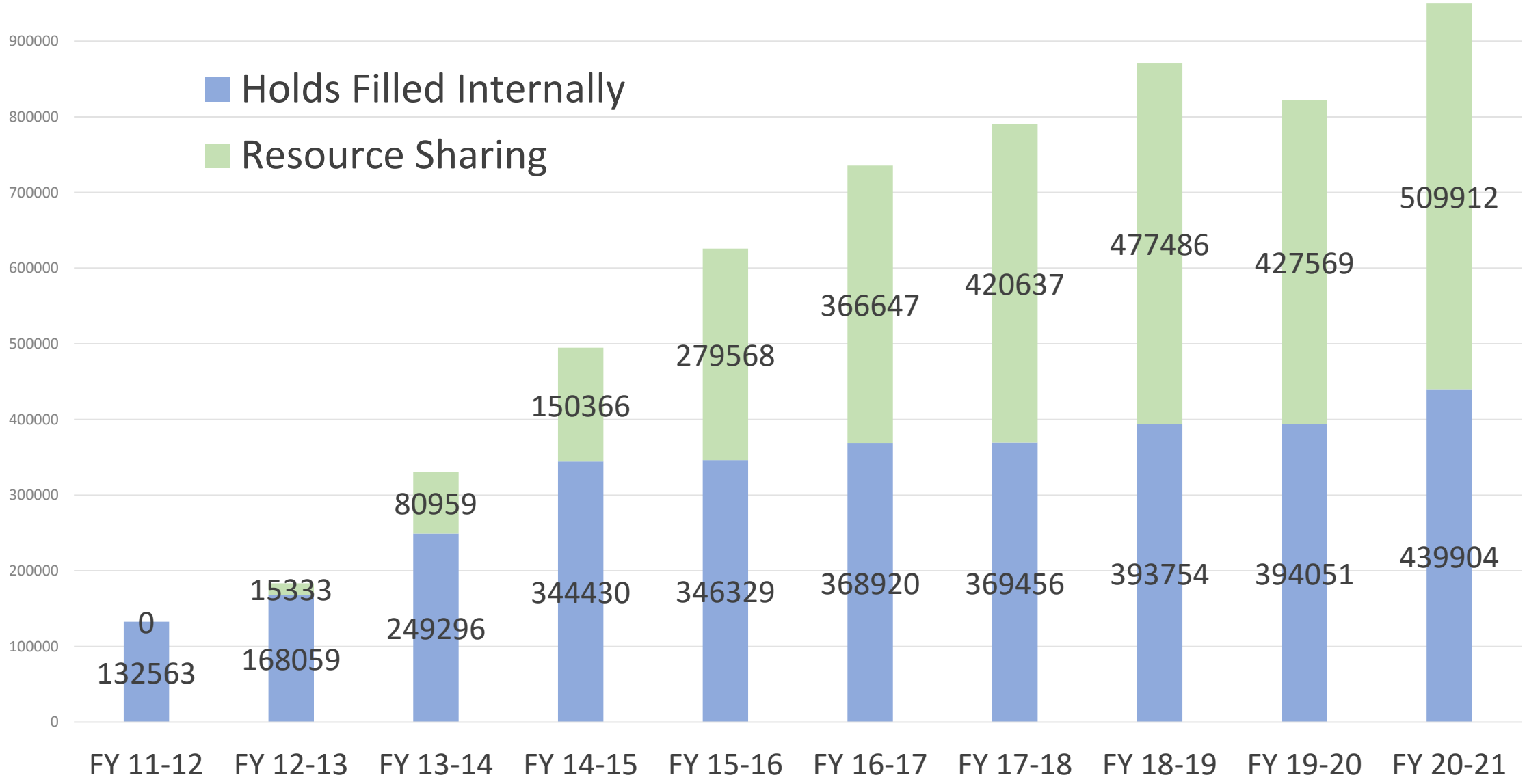


Outcome of Hold Requests

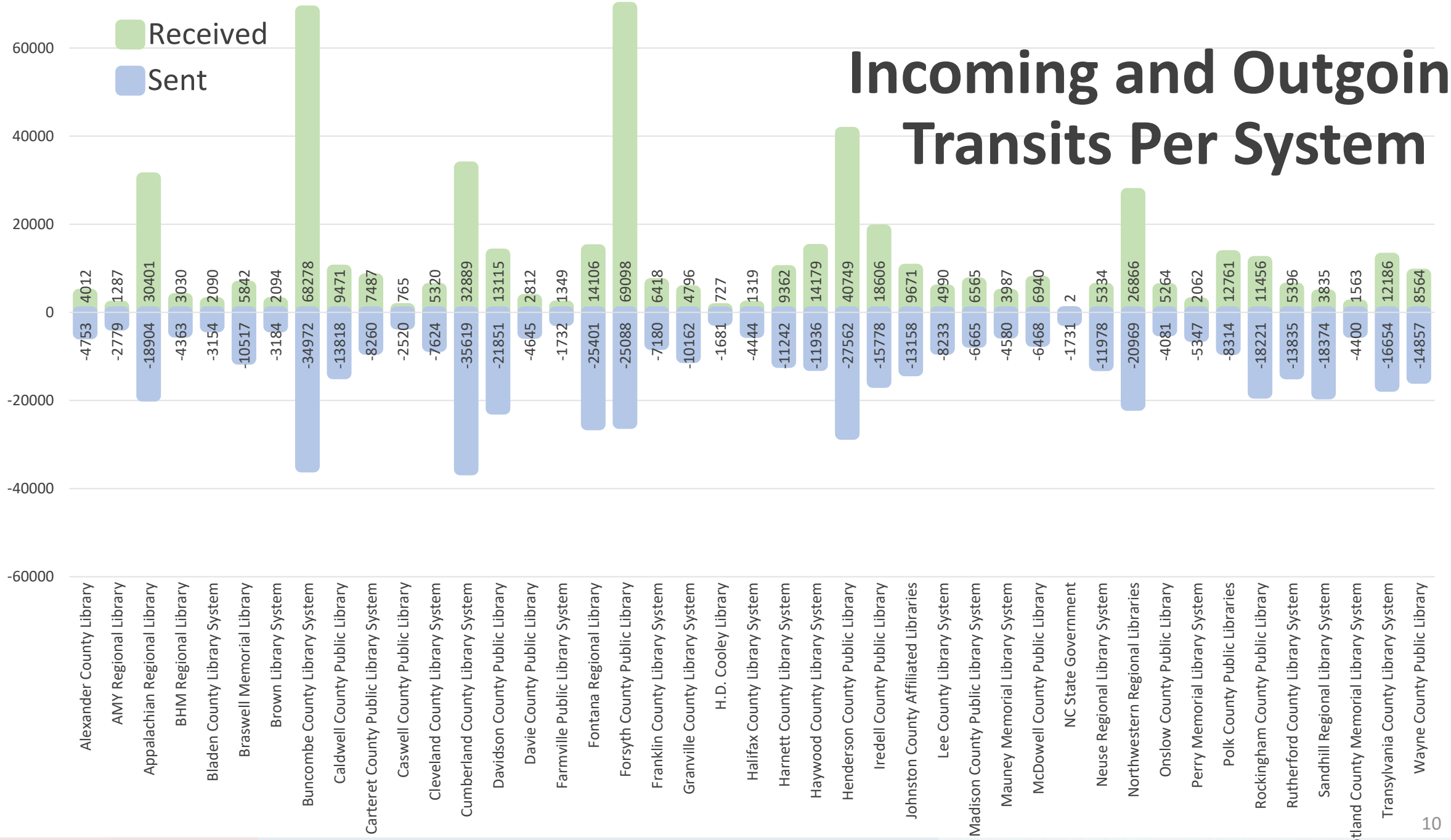


Total Hold Requests: 1,462,532

Resource Sharing: Source of Transit Holds



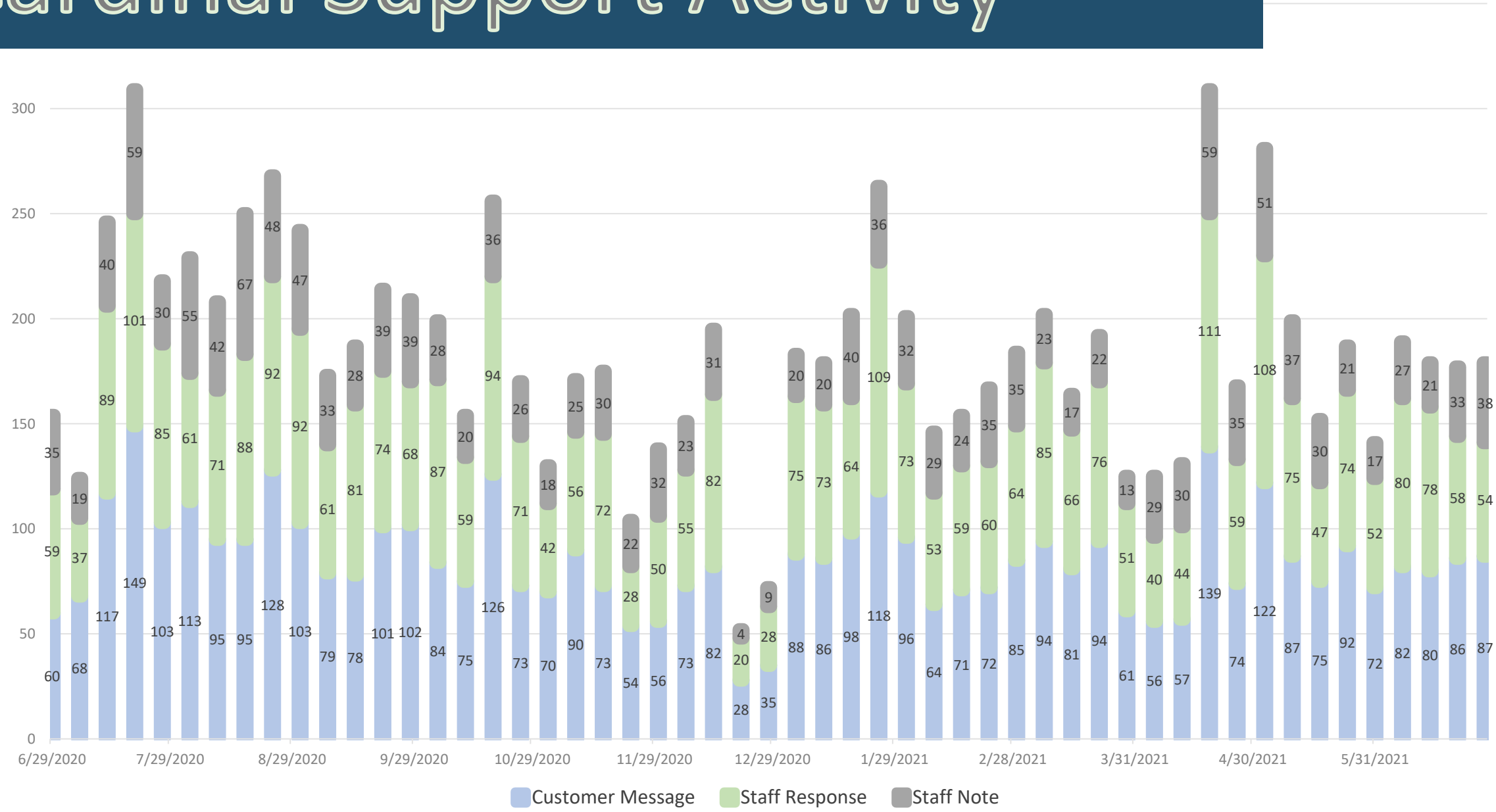
Incoming and Outgoing Transits Per System





Projects & Activities

Cardinal Support Activity



Cataloging Committee: Members

- Jessica Efron – NC Govt
- Heidi Flythe – Braswell
- Wanangwa Hartwell – Polk
- Kathryn Nesbit – Forsyth
- Jessica Philyaw – Fontana
- Will Szwagiel – Wayne
- Mary Wilson – Carteret

Book Deduplication Project

```
$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}
);
```

Catalogers, please review the data (that is not greyed out) in this tab only, comparing the lead bib with the subordinate bib (to be deleted) to see if the lead bib is the better bib. You can right click on the field with the lead bib TCN that you are reviewing, you will see the 'comment' option near the bottom of the list to leave your comment in column A.

Lead Bib	Sub Bib	Lead Bib Link	Sub Bib Link	Lead Icon	Sub Icon	Lead Bib library with	Sub Bib library with	Title
6480961	10507945	http://nccardinal.org/eg/	http://nccardinal.org/e	book	book	ABERDEEN,ALLEGHANY,AN	PERRY_MAIN,POLK_COL,	Foreign affairs /
140010	10404312	http://nccardinal.org/eg/	http://nccardinal.org/e	book	book	ABERDEEN,ALLEGHANY,AN	THORNTON	Bad blood /
140010	6417667	http://nccardinal.org/eg/	http://nccardinal.org/e	book	book	ABERDEEN,ALLEGHANY,AN	BCPL_MAIN,BENSON,BET	Bad blood /
10084550	10451176	http://nccardinal.org/eg/	http://nccardinal.org/e	book	book	ABERDEEN,ALLEGHANY,AN	THORNTON	A life on the road /
6604096	10508594	http://nccardinal.org/eg/	http://nccardinal.org/e	book	book	ABERDEEN,ALLEGHANY,AN	GRANVILLE,S_GRANVILLE	Blood Flag :
70351	10432736	http://nccardinal.org/eg/	http://nccardinal.org/e	book	book	ABERDEEN,ALLEGHANY,AN	THORNTON	The cat who sang for the birds /
70351	9309527	http://nccardinal.org/eg/	http://nccardinal.org/e	book	book	ABERDEEN,ALLEGHANY,AN	SCML_MAIN	The cat who sang for the birds /
70351	10366390	http://nccardinal.org/eg/	http://nccardinal.org/e	book	book	ABERDEEN,ALLEGHANY,AN	BCPL_MAIN	The cat who sang for the birds /
1566962	10461360	http://nccardinal.org/eg/	http://nccardinal.org/e	book	book	ABERDEEN,ALLEGHANY,AN	THORNTON	The art of mending :
4589751	10504742	http://nccardinal.org/eg/	http://nccardinal.org/e	book	book	ABERDEEN,ALLEGHANY,AN	S_GRANVILLE	The liar /
9171453	10810650	http://nccardinal.org/eg/	http://nccardinal.org/e	book	book	ABERDEEN,ALLEGHANY,AN	POLK_COL,POLK_SAL	Cross justice /
9171453	11062392	http://nccardinal.org/eg/	http://nccardinal.org/e	book	book	ABERDEEN,ALLEGHANY,AN	PERRY_MAIN	Cross justice /
1005437	10456548	http://nccardinal.org/eg/	http://nccardinal.org/e	book	book	ABERDEEN,ALLEGHANY,AN	S_GRANVILLE	The devil wears Prada /
1005437	6038014	http://nccardinal.org/eg/	http://nccardinal.org/e	book	book	ABERDEEN,ALLEGHANY,AN	GREENE,KINSTON,LAGRA	The devil wears Prada /
1005437	5173480	http://nccardinal.org/eg/	http://nccardinal.org/e	book	book	ABERDEEN,ALLEGHANY,AN	BROWN_MAIN,SCML_MA	The devil wears Prada /
1930477	10400381	http://nccardinal.org/eg/	http://nccardinal.org/e	book	book	ABERDEEN,ALLEGHANY,AN	STOVALL	Just take my heart :
4097187	6102003	http://nccardinal.org/eg/	http://nccardinal.org/e	book	book	ABERDEEN,ALLEGHANY,AN	KINSTON	The job :
4097187	9165693	http://nccardinal.org/eg/	http://nccardinal.org/e	book	book	ABERDEEN,ALLEGHANY,AN	BENSON,BETHLEHEM,BR	The job :
9408075	10514937	http://nccardinal.org/eg/	http://nccardinal.org/e	book	book	ABERDEEN,ALLEGHANY,AN	POLK_COL,STOVALL,THOI	Fast & loose /
11604422	12550294	http://nccardinal.org/eg/	http://nccardinal.org/e	book	book	ABERDEEN,ALLEGHANY,AN	JACKSONVILLE,RICHLAND	Daddy's girls : a novel
375077	4012887	http://nccardinal.org/eg/	http://nccardinal.org/e	book	book	ABERDEEN,ALLEGHANY,AN	SCH_OCRACOKE	First family /
375077	11240106	http://nccardinal.org/eg/	http://nccardinal.org/e	book	book	ABERDEEN,ALLEGHANY,AN	HALIFAX_MAIN,SCOTLAN	First family /
10033783	10939857	http://nccardinal.org/eg/	http://nccardinal.org/e	book	book	ABERDEEN,ALLEGHANY,AN	PERRY_MAIN	The flaming ship of Ocracoke

Cataloging Forum

June 10,2021 – 66 attendees

Discussion of Deduplication

Debut Cataloging Cleanup Reports

Breakout sessions by region

Reminders and updates

Question & Answer session

Cataloging Forum YouTube videos – 53 views

Cataloging Cleanup Reports

Large Print item to bib mis-match

Show 10 entries Search:

Bib ID	Barcode	Call Number	OPAC Icon	Branch	Issue	Ignore
2097		F OKE	lpbook		item is not large print, bib is	Ignore
2097		F OKE	lpbook		item is not large print, bib is	Ignore
2097		F OKE	lpbook		item is not large print, bib is	Ignore
4006		F SEGAL	lpbook		item is not large print, bib is	Ignore
9757		LP CLARK	book		item is large print, bib is not	Ignore

Showing 1 to 5 of 5 entries Previous 1 Next

Items attched to Electronic bibs

Show 10 entries Search:

Bib ID	Barcode	Call Number	OPAC Icon	Branch	Issue	Ignore
364178		940.53 W	ebook		item attached to electronic bib	Ignore
648006		346.7301 S	ebook		item attached to electronic bib	Ignore
728815		F BENISON	ebook		item attached to electronic bib	Ignore

Staff Education and Training

NC Cardinal 2019-2020 Annual Report video (129 views)

Upgrade to Evergreen 3.5 webinar (94 attendees)

Video posted Oct 2020 (336 views)

Customized online migration training sessions and unlisted videos for:

Acquisitions

Circulation

Cataloging

Offline transactions

Reports

Staff Education and Training

Video title	Views
Upgrade to Evergreen 3.5 webinar	336
Circulation Basics webinar	278
ItemCat 1 Intro	163
BibCat 2 Descriptive Cataloging	161
NC Cardinal Evergreen OPAC training	157
Offline Transactions in the Evergreen Web Client	143
NC Cardi	
Reports C	
BibCat 1	
ItemCat 3 Standards	119
First Search	111
ItemCat 2 Cataloging Etiquette	93
ItemCat 5 Select Best Record	84
Cataloging in the Evergreen 3.3 Web Staff Client	83
BibCat 3 Encoding	79
ItemCat 6 Fixed Fields	74
ItemCat 4 Search Catalog	73
ItemCat 7 Items, Volumes, Parts	73
Transylvania live circulation session #1	67

ItemCat 8 Large Print and Mongraph Parts	56
ItemCat 9 Wrap Up	53
BibCat 6 Subject Headings	51
BibCat 4 Authorities part 1	50
Transylvania cat session #1	47
NC Cardinal OPAC redesign project	45
BibCat 5 Authorities part 2	43
Cataloging Forum part 1	35
Transylvania live circulation session #2	35
Transylvania circ live session #3	32
Hopeless Holds webinar	27
Transylvania circ live session #4	19
Cataloging Forum part 2	18
Burke Circulation Training - morning session	18
Transylvania cat session #2	17
Onslow Acquisitions Training: session 1	16
E-Resources Clean Up Project	13

NC Cardinal YouTube channel total views: 3272

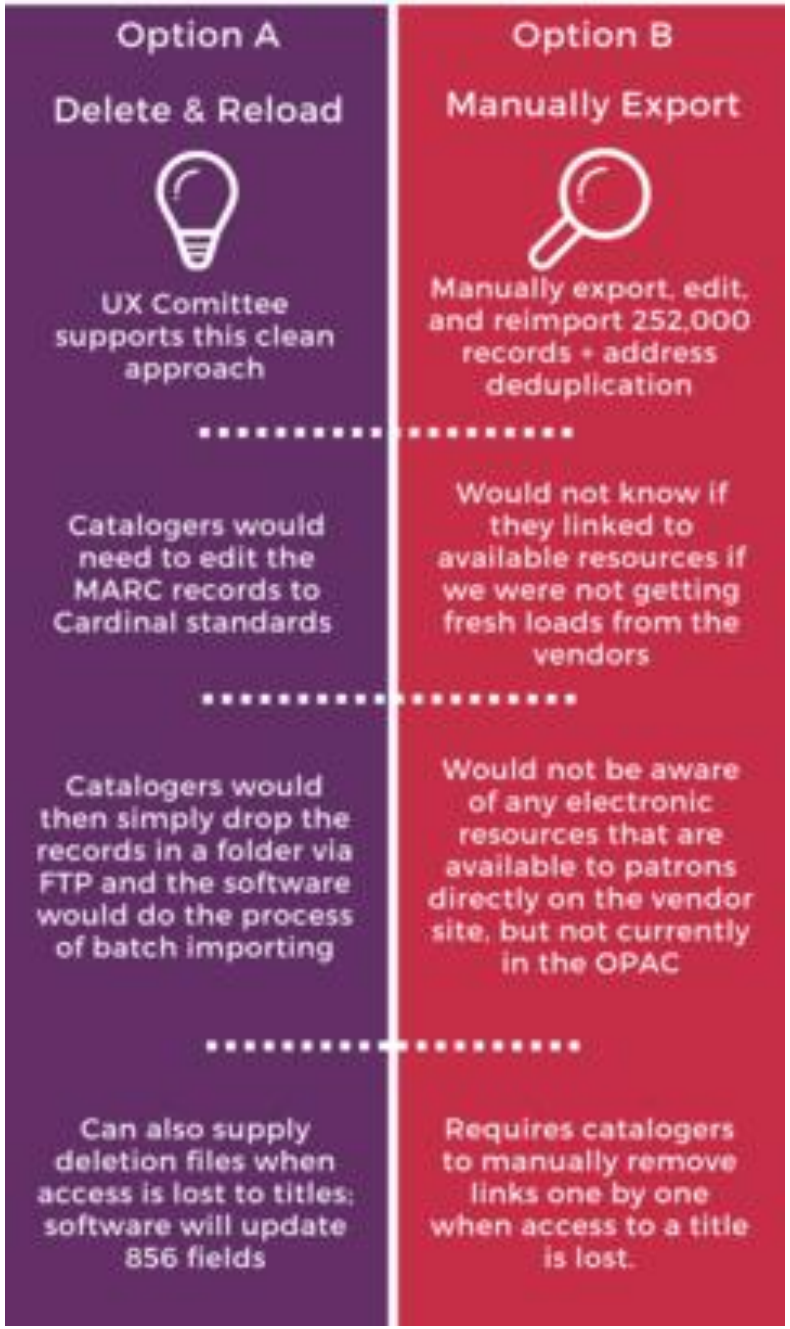
Electronic Resource Clean Up

Project Goals

- Deduplication and link clean up
- Increase patron access to electronic resources
- New upload process for catalogers
- Integrate software from Mobius to make the process more efficient

DELETE & RELOAD
VERSUS
MANUALLY EXPORT

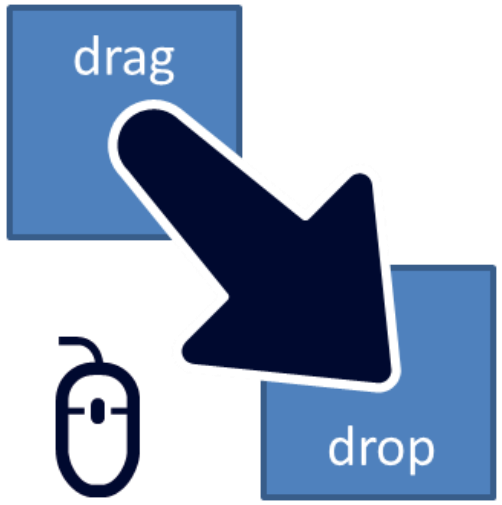
COMPARING THE 2 PROCESSES



Electronic Resource Clean Up

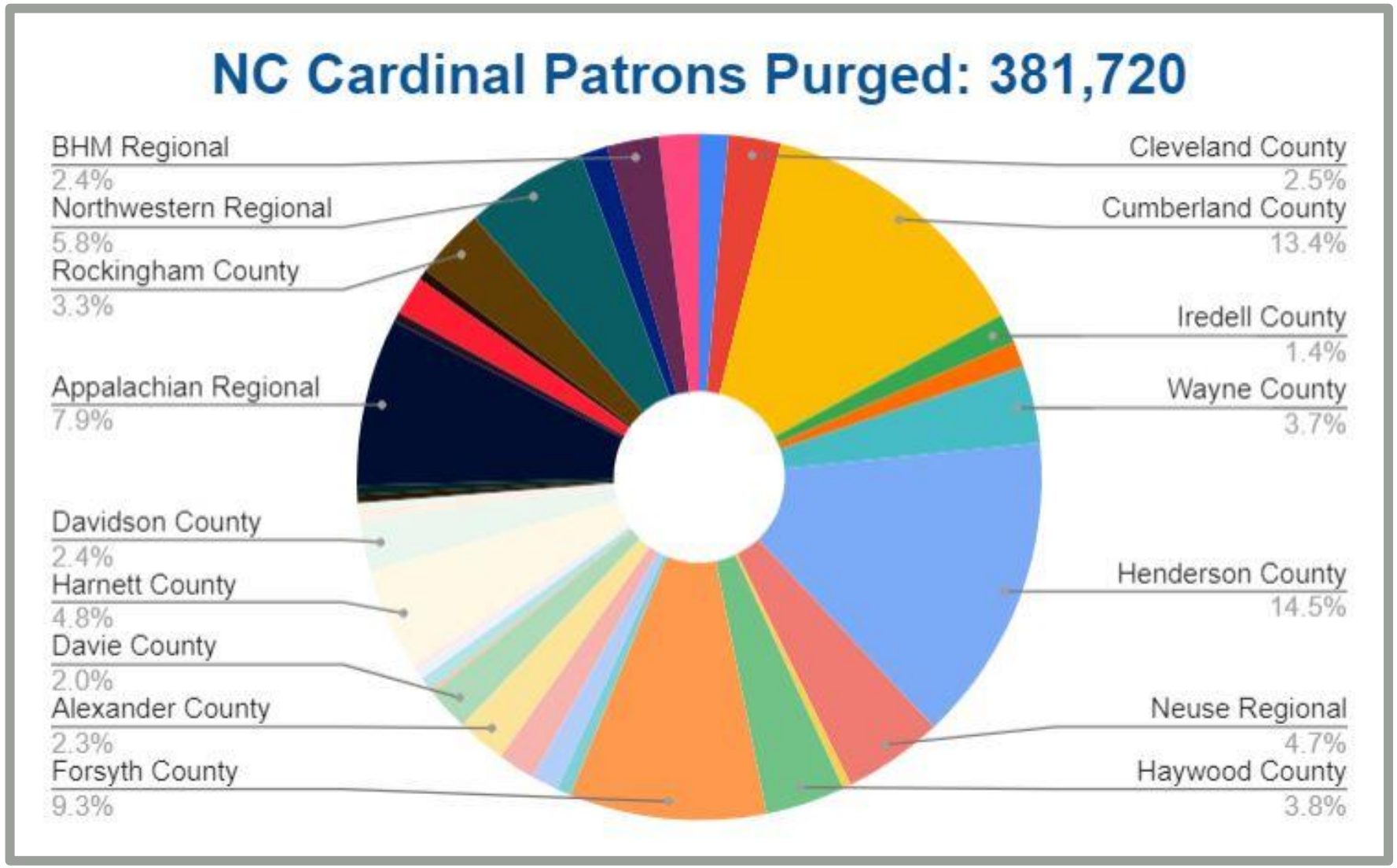
Project Outcomes

- **343,145** Records (re)Loaded
- New upload process for catalogers
- NC Cardinal will continue to load Overdrive collections (not Advantage)



	New Records	Merged With Others	Total
Cumberland: Baker & Taylor	305	0	305
Davidson: Freading	17730	160	17890
Haywood: Ebsco	18	0	18
Rockingham: Cloud Library	478	191	669
Rockingham: Baker & Taylor	236	55	291
Wayne: Gale	59	47	106
Hein Online	3469	1611	5080
Hathi Trust	4492	143	4635
Jstor	2851	19	2870
Government Documents	41405	4194	45599
NC Gov titles	3553	121	3674
Iredell: Overdrive	18128	3795	21923
Sandhill: Overdrive	1313	956	2269
e-iNC audio	3162	83	3245
e-iNC e-book	23557	454	24011
e-iNC magazine	3533	16	3549
e-iNC video	276	0	276
e-iNC Total	**30528**	**553**	**31081**
NC Digital audio	12388	384	12772
NC Digital e-book	32856	1009	33865
NC Digital magazine	3312	382	3694
NC Digital video	416	5	421
NC Digital Total	**48972**	**1780**	**50752**
NC Kids audio	6230	651	6881
NC Kids e-book	25440	3406	28846
NC Kids video	1221	127	1348
NC Kids Total	**32891**	**4184**	**37075**

Patron Purge



Total Patrons Purged: 381,720

User Experience Committee

- Meghan Blackburn– Cleveland
- Shawna Bryce– Madison
- Justin Stout– Neuse Regional
- Forrest Tate– Henderson
- Lisa Sheffield– Transylvania
- Amy Weber– Iredell
- Shannon Hearne– Sandhill

Student Access

The Student Access Program grew in 20-21

New Systems

- Mauney Memorial
- Sandhill Regional

Total Number of Participants

- 31 Systems
- 46 Counties

485,734 active accounts this year

Checkouts

58,776 total checkouts

5,263 total users (1%) checked something out

Average 11.17 items per person

Electronic Resource Authentications

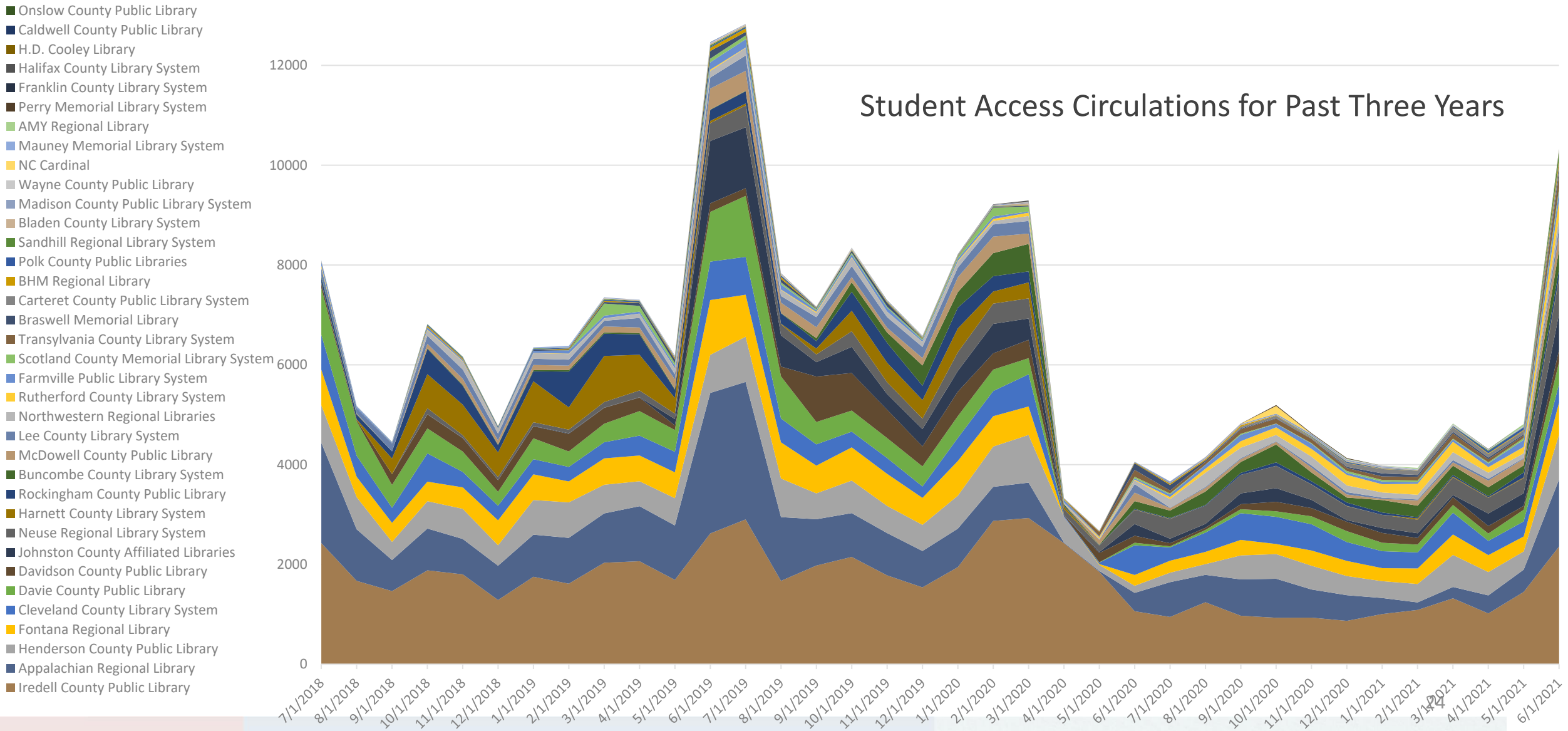
195,458 total authentications

29,688 total users (6%) authenticated electronically

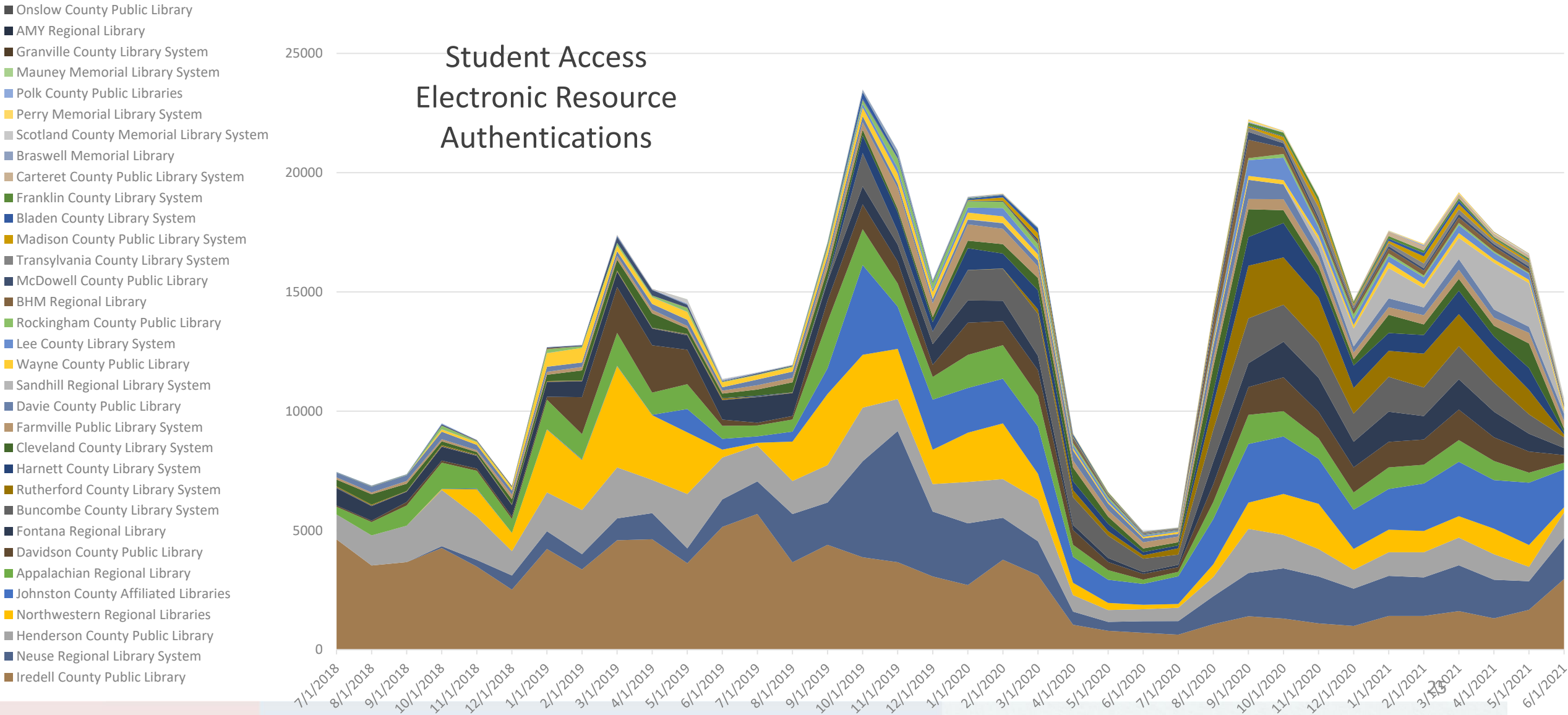
Average 6.58 connections per account

StudentAccess

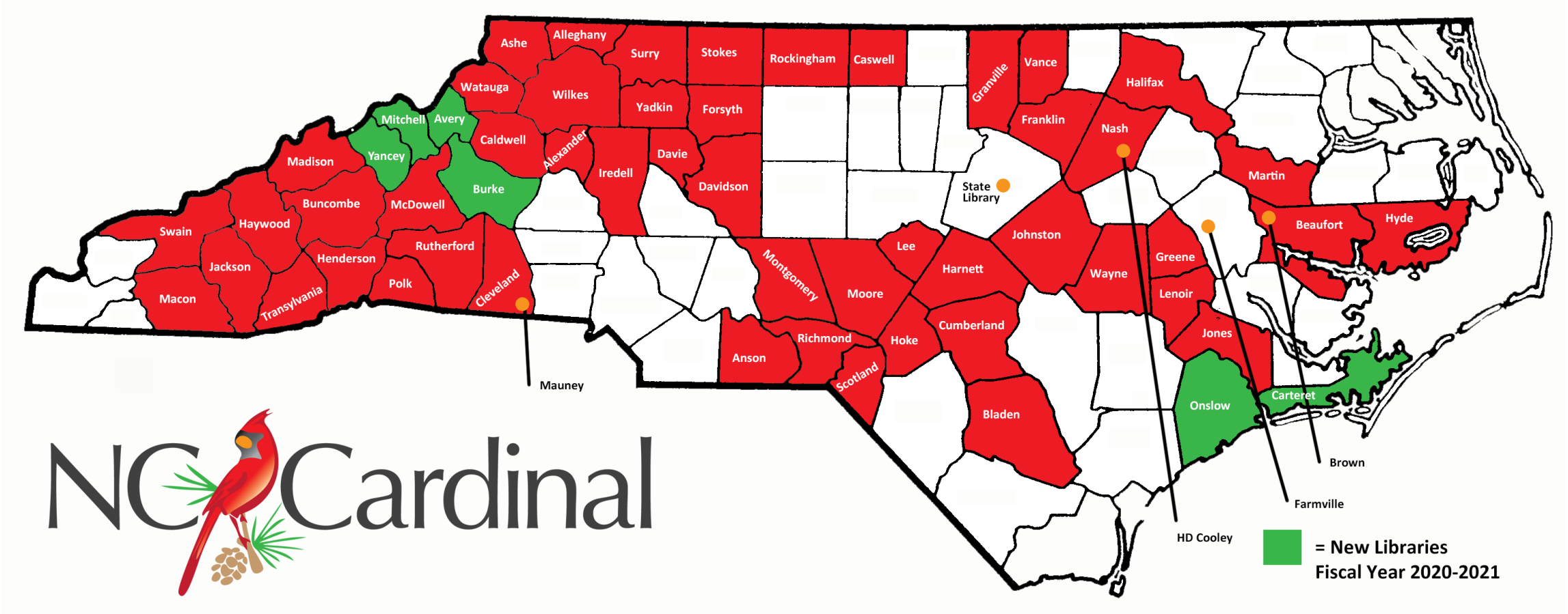
Student Access Circulations



Student Access Authentications

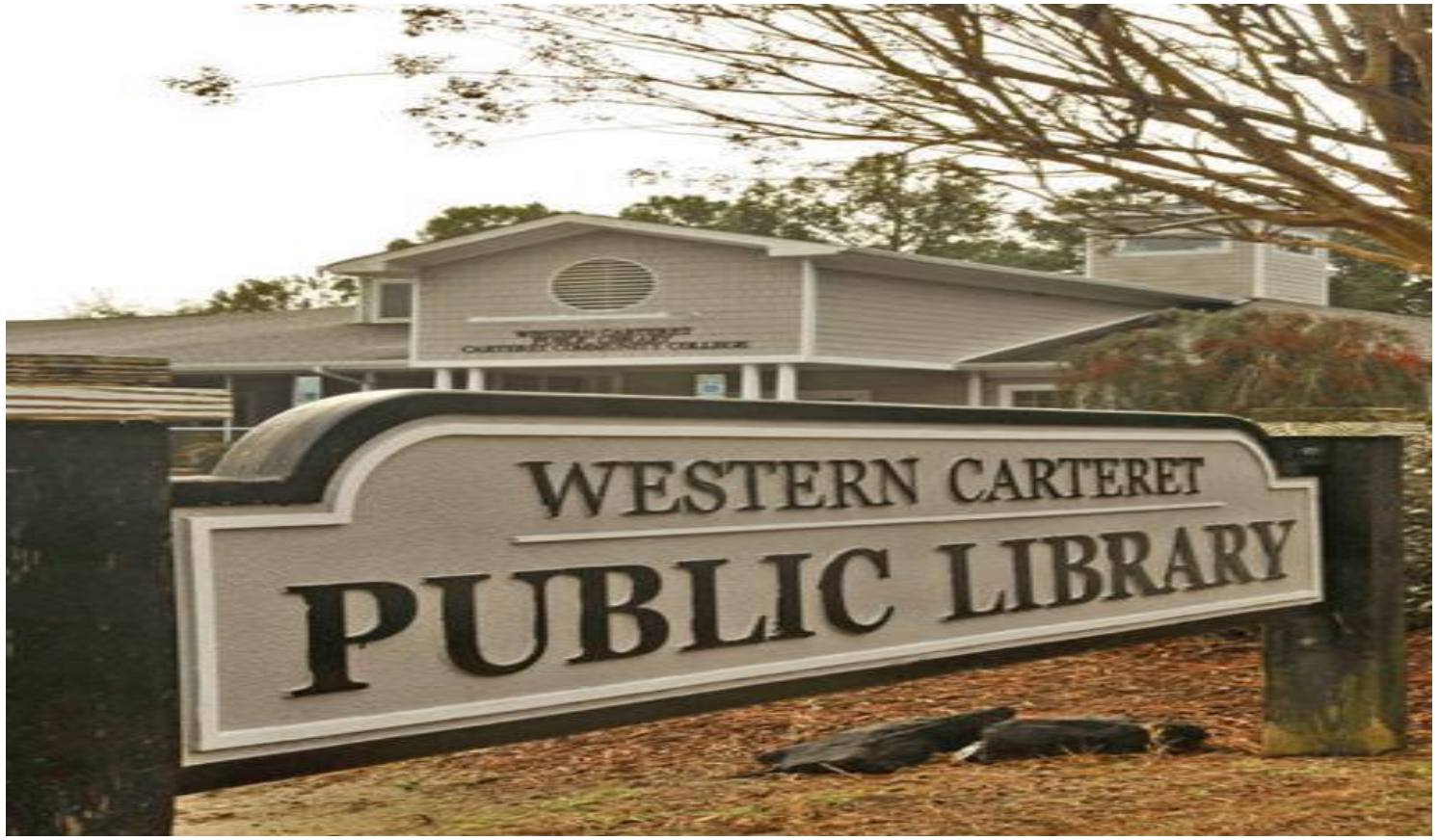


Library Migration in 20-21



NC Cardinal

56 counties, 4 municipalities, 7 Special Libraries
202 branches



Carteret County Public Library System

Beaufort Main
Western Carteret
Down East
Bogue Bank
Newport





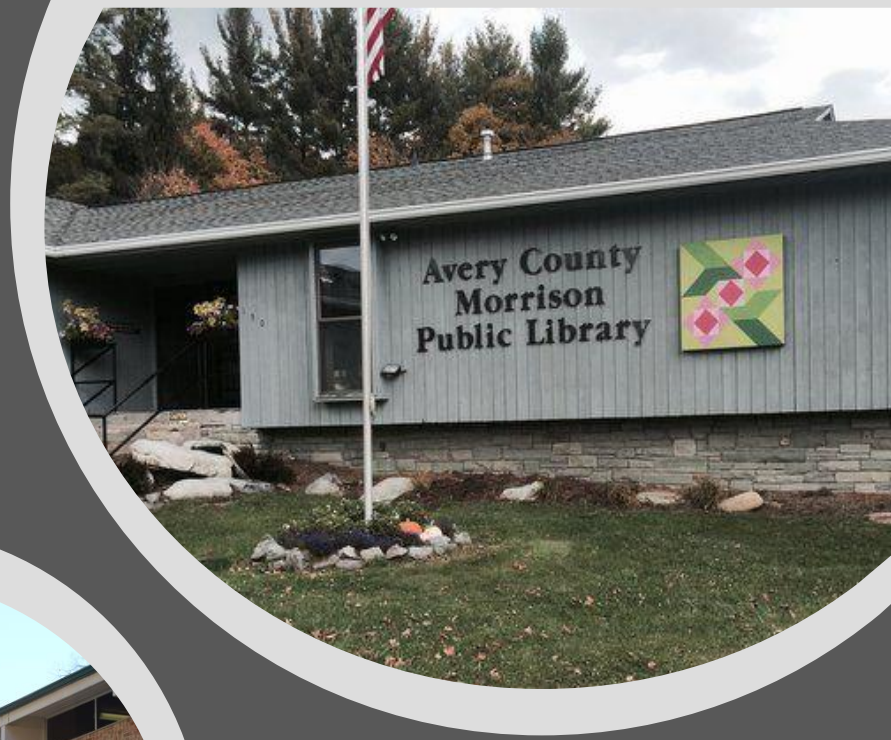




Onslow County Public Library

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







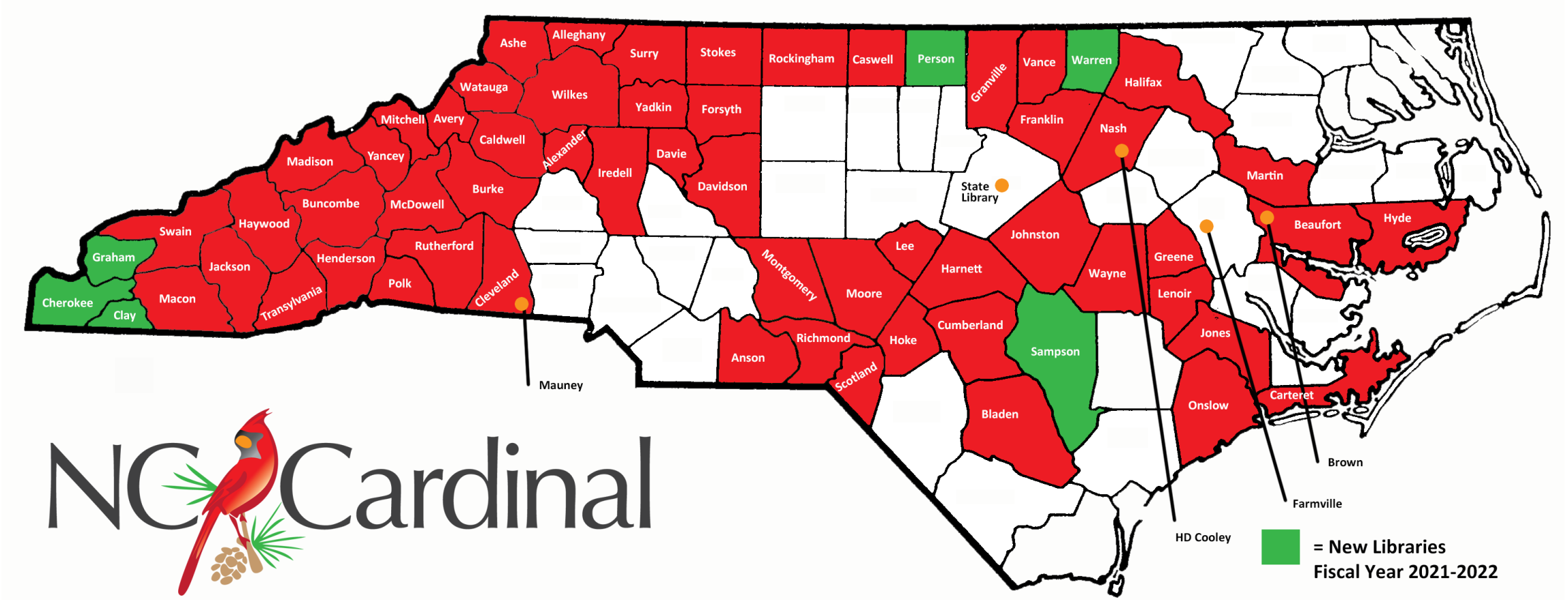
Burke County Public Library

Morganton Public Library

Valdese Public Library

C.B. Hildebrand Public Library

Library Migration in 21-22



NC Cardinal

62 counties, 4 municipalities, 7 Special Libraries
212 branches

Person County Public Library



Sampson-Clinton Public Library System (SCPL)

J.C. Holliday Library/Sampson County Outreach Services

Bryan Memorial Library

Miriam Lamb Memorial Library

Roseboro Public Library

















Nantahala Regional Library

Graham County Library

Moss Memorial Library

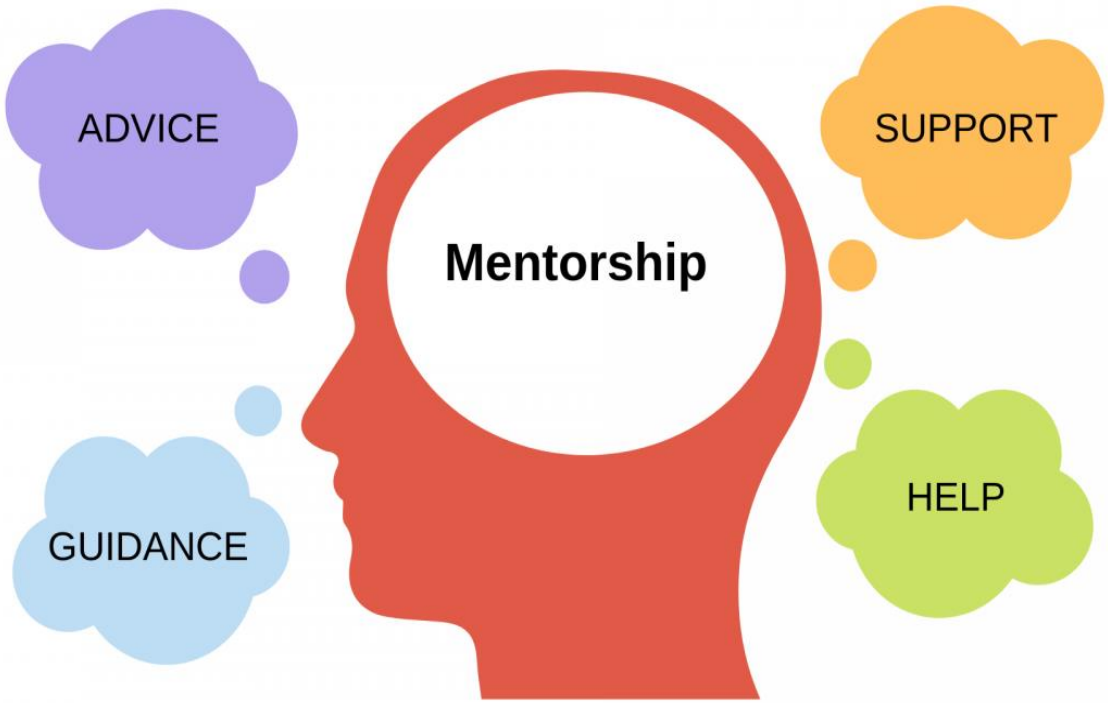
Andrews Public Library

Murphy Public Library



Warren County Memorial Library

Migration Mentors



"A mentorship is not just for the benefit of the mentee; it is a vehicle for communication between two individuals interested in sharing and appreciating knowledge."

Joy Urbina, Information Literacy Librarian , University of Texas at El Paso Library

https://www.ala.org/advocacy/diversity/odlos-blog/mentorship-tricks

Migration Mentors

Mentor Library Systems

Appalachian Regional Library
George H. and Laura E. Brown Library
Caswell County Library
Franklin County Library
Henderson County Public Library
Neuse Regional Library
Polk County Public Libraries
Rutherford County Library

Migration Mentors

NC Cardinal Cataloging Committee Representatives

Angie Bates

Jessica Philyaw

Jonathan Furr

Wanangwa Hartwell

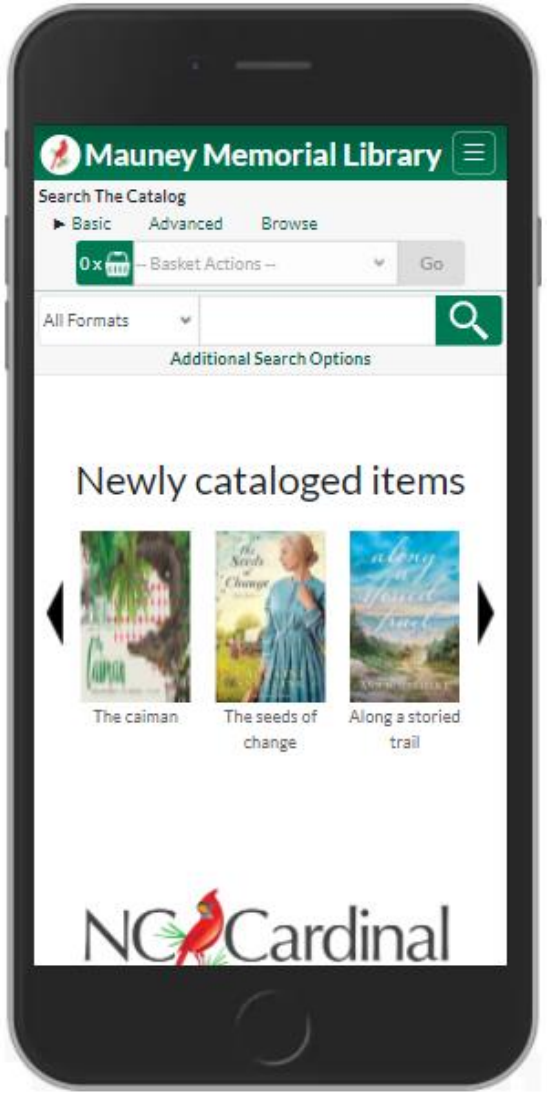
Will Szwagiel

OPAC Redesign

Redesign in Production

- OPAC redesign templates have been deployed to several systems in small batches. They are given a week to test before changes go to production.
- Original templates still exist for the time being.
- Newly migrated systems are set up with OPAC redesign

Batch	Systems
Batch No. 1	Mauney, Farmville
Batch No. 2	Caswell, Brown
Batch No. 3	Alexander, Madison, Halifax, Polk





Some Upcoming Projects

Holds Targeting

How Evergreen chooses which item should fill a hold request

Library Hold Rules

- Owning Library
- Requester's Library
- Pickup Library
- User's Permission Group
- Material Type
- Limits on Number of Materials

Evergreen Ranks Possible Items

- What's currently not checked out
- Age Hold Protection
- Is it available locally?

Holds Targeting

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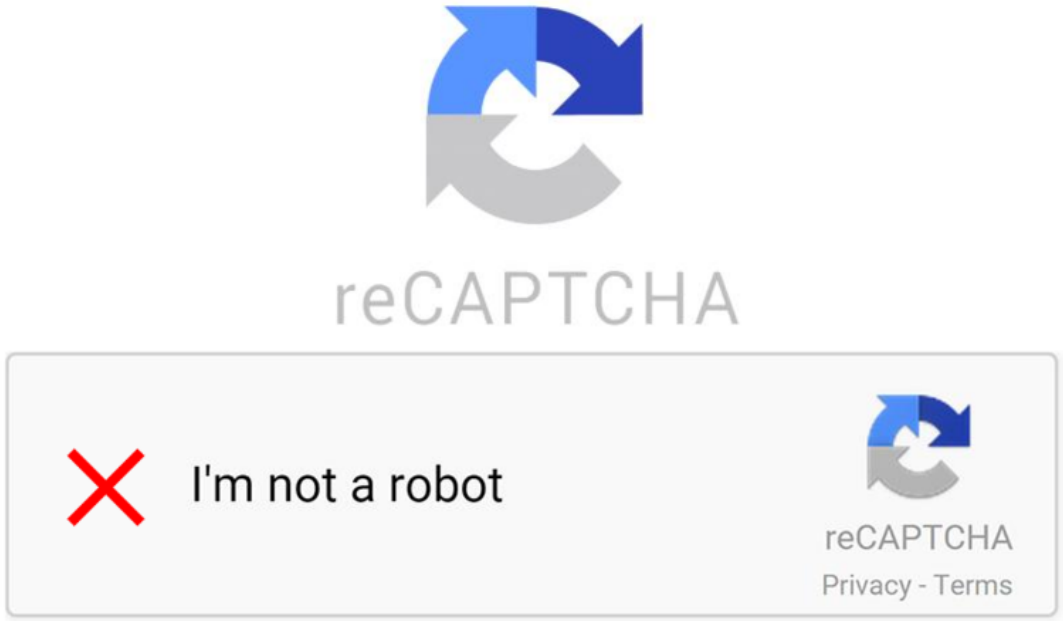
Add: Shipping Distance Into Ranking

History Table for Forensics

ReCaptcha

Redesign in Production

- ReCaptcha is a tool created by Google to analyze traffic on a website and determine whether a visitor is a bot or not.
- The software challenges the user with several puzzles and scores them based on their responses
- Several systems have reported spam on the self-registration form. This should help reduce that dramatically.



Library Settings Reviews

- What configurations do you currently have?
- How do these configurations interact?
- What other options are available to you?
- Are there any options that you don't have a value set for?
- How can we make Evergreen behave the way you'd like it to behave for you?

Group	Setting	Context	Value
Acquisitions	Allow funds to be rolled over without bringing the money along		
Acquisitions	Default circulation modifier	BUNCOMBE	BOOK
Acquisitions	Default copy location	BUNCOMBE	Adult New Fiction
Acquisitions	Fund Spending Limit for Block		
Acquisitions	Fund Spending Limit for Warning		
Acquisitions	Initial status for received items		
Acquisitions	Rollover Distribution Formulae Funds		
Acquisitions	Set copy creator as receiver		
Acquisitions	Temporary barcode prefix		
Acquisitions	Temporary call number prefix		
Acquisitions	Upload Activate PO		
Acquisitions	Upload Create PO		
Acquisitions	Upload Default Insufficient Quality Fall-Thru Profile		
Acquisitions	Upload Default Match Set	CARDINAL	Cardinal match
Acquisitions	Upload Default Merge Profile		
Acquisitions	Upload Default Min. Quality Ratio		
Acquisitions	Upload Default Provider		
Acquisitions	Upload Import Non Matching by Default		
Acquisitions	Upload Load Items for Imported Records by Default		
Acquisitions	Upload Merge on Best Match by Default		
Acquisitions	Upload Merge on Exact Match by Default		
Acquisitions	Upload Merge on Single Match by Default		
Booking	Elbow room	CARDINAL	1 day
Booking	booking.allow_email_notify		
Cataloging	Default Classification Scheme	CARDINAL	2
GUI	Alert on empty bib records	BUNCOMBE	True
GUI	Button bar	BUNCOMBE	circ
GUI	Cap results in Patron Search at this number.		
GUI	Default Country for New Addresses in Patron Editor	CARDINAL	US
GUI	Default Hotkeyset		
GUI	Default Ident Type for Patron Registration	BUNCOMBE	Drivers License
GUI	Default showing suggested patron registration fields		
GUI	Deprecated: Format Dates with this pattern.	CARDINAL	MM/dd/yyyy
GUI	Deprecated: Format Times with this pattern.		
GUI	Disable the ability to save list column configurations locally.	BUNCOMBE	False
GUI	Example dob field on patron registration		
GUI	Example for day_phone field on patron registration		
GUI	Example for email field on patron registration		
GUI	Example for evening_phone field on patron registration		
GUI	Example for other_phone field on patron registration		
GUI	Example for phone fields on patron registration		
GUI	Example for post_code field on patron registration		
GUI	Format Date+Time with this pattern		
GUI	Format Dates with this pattern		
GUI	GUI: Enable Experimental Angular Staff Catalog		
GUI	GUI: Hide these fields within the Item Attribute Editor		
GUI	Horizontal layout for Volume/Copy Creator/Editor.		

Circulation	Auto-Extend Grace Periods	BUNCOMBE	True
Circulation	Auto-Extending Grace Periods extend for all closed dates	BUNCOMBE	True
Circulation	Auto-Extending Grace Periods include trailing closed dates	BUNCOMBE	True
Circulation	Block hold request if hold recipient privileges have expired	BUNCOMBE	True
Circulation	Cap Max Fine at Item Price	BUNCOMBE	False
Circulation	Checkout Fills Related Hold	BUNCOMBE	True
Circulation	Checkout Fills Related Hold On Valid Copy Only		
Circulation	Checkout auto renew age		
Circulation	Clear hold when other patron checks out item		
Circulation	Display copy alert for in-house-use		
Circulation	Display copy location checkin alert for in-house-use		
Circulation	Do not change fines/fees on zero-balance LOST transaction		
Circulation	Do not include outstanding Claims Returned circulations in lump sum tallies in Patron Display.	BUNCOMBE	True
Circulation	Exclude Courtesy Notices from Patrons Itemsout Notices Count		
Circulation	Forgive fines when checking out a long-overdue item and copy alert is suppressed?		
Circulation	Forgive fines when checking out a lost item and copy alert is suppressed?		
Circulation	Hold Shelf Status Delay	BUNCOMBE	30 minutes
Circulation	Include Lost circulations in lump sum tallies in Patron Display.		
Circulation	Invalid patron address penalty		
Circulation	Item Status for Missing Pieces		
Circulation	Load patron from Checkout		
Circulation	Long-Overdue Check-In Interval Uses Last Activity Date		
Circulation	Long-Overdue Items Usable on Checkin		
Circulation	Long-Overdue Max Return Interval		
Circulation	Lost Checkin Generates New Overdues		
Circulation	Lost items usable on checkin	BUNCOMBE	True
Circulation	Max Patron Claims Returned Count	BUNCOMBE	3
Circulation	Maximum visible age of User Trigger Events in Staff Interfaces		
Circulation	Minimum Transit Checkin Interval		
Circulation	Number of Retrievable Recent Patrons	CARDINAL	10
Circulation	Patron Merge Address Delete		
Circulation	Patron Merge Barcode Delete	CARDINAL	False
Circulation	Patron Merge Deactivate Card	CARDINAL	True
Circulation	Patron Registration: Cloned patrons get address copy	BUNCOMBE	True
Circulation	Patron search diacritic insensitive	CARDINAL	True
Circulation	Permission groups exempt from item deposit fees		
Circulation	Permission groups exempt from item rental fees		
Circulation	Printing: Custom Javascript File		
Circulation	Require matching email address for password reset requests	BUNCOMBE	False
Circulation	Restore Overdues on Long-Overdue Item Return		
Circulation	Restore overdues on lost item return	BUNCOMBE	True
Circulation	Specify search depth for the duplicate patron check in the patron editor	CARDINAL	0
Circulation	Suppress Hold Transits Group		
Circulation	Suppress Non-Hold Transits Group		
Circulation	Suppress popup-dialogs during check-in.		
Circulation	Target copies for a hold even if copy's circ lib is closed	CARDINAL	True
Circulation	Target copies for a hold even if copy's circ lib is closed IF the circ lib is the hold's pickup lib	PACK	True
Circulation	Truncate fines to max fine amount		



NC Cardinal's 10th Anniversary…

Thank You!