



NC Research.
Library Support.
Talking Books.



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

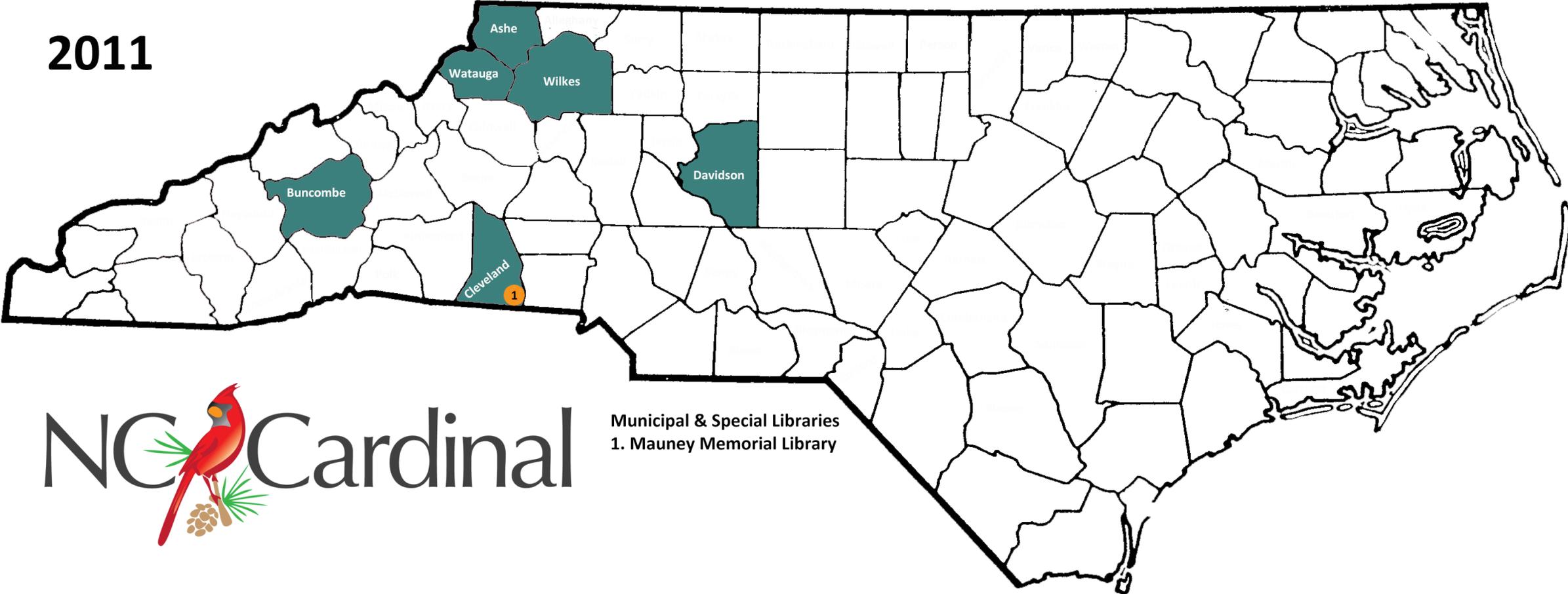
Committees

Clean Up & Consolidation

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

Steady Growth

2011



Municipal & Special Libraries
1. Mauney Memorial Library

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

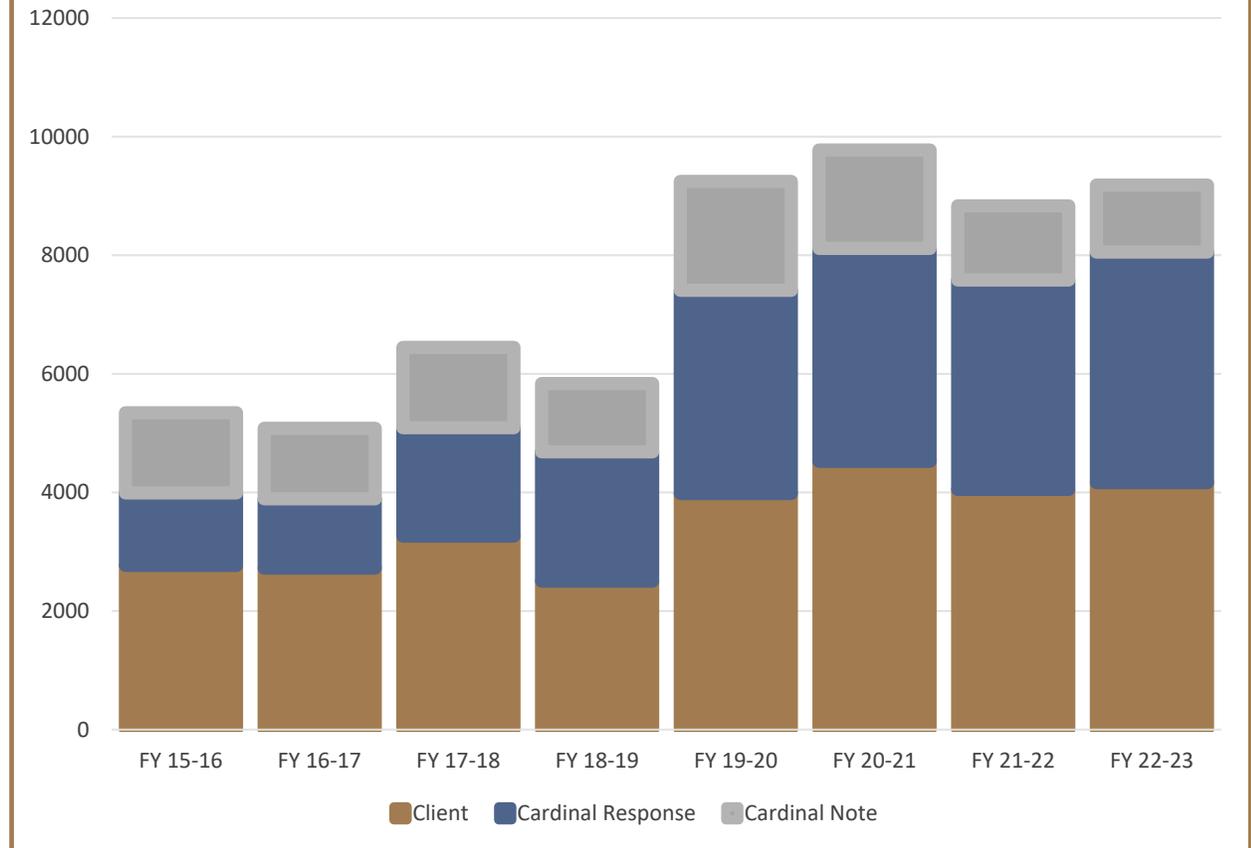
2020: Electronic Resources
Patron Purge

2021: Settings Consultations

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

2023: Holds Targeter
Orphaned Bibs

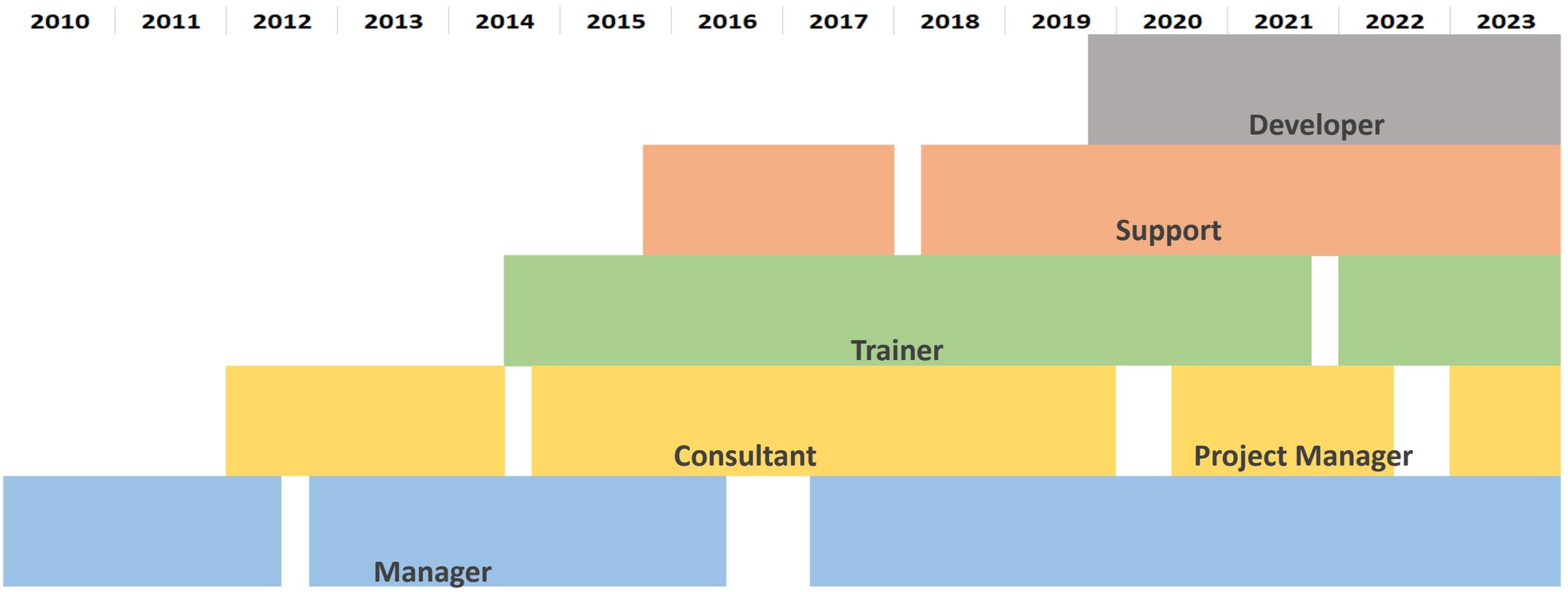
Cardinal Annual Support Ticket Activity



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

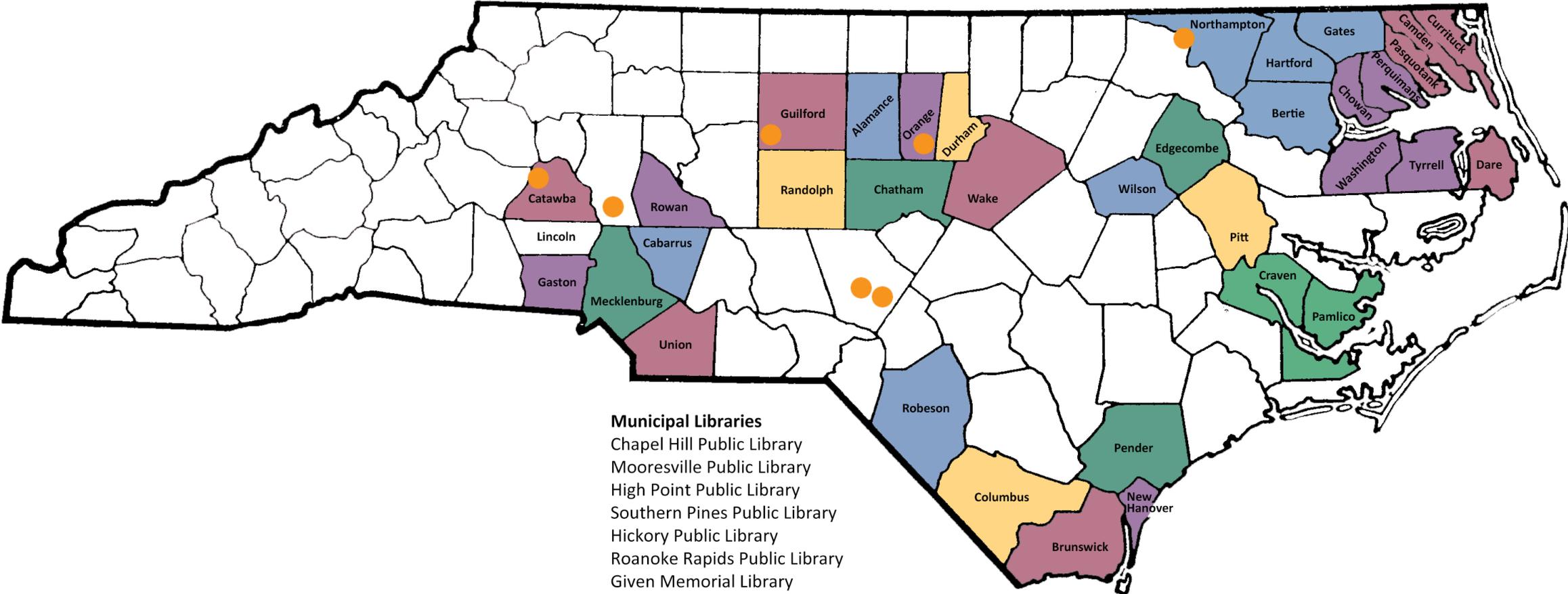


Staffing Changes Over the Years



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

Slowing Growth but Growing Complexity



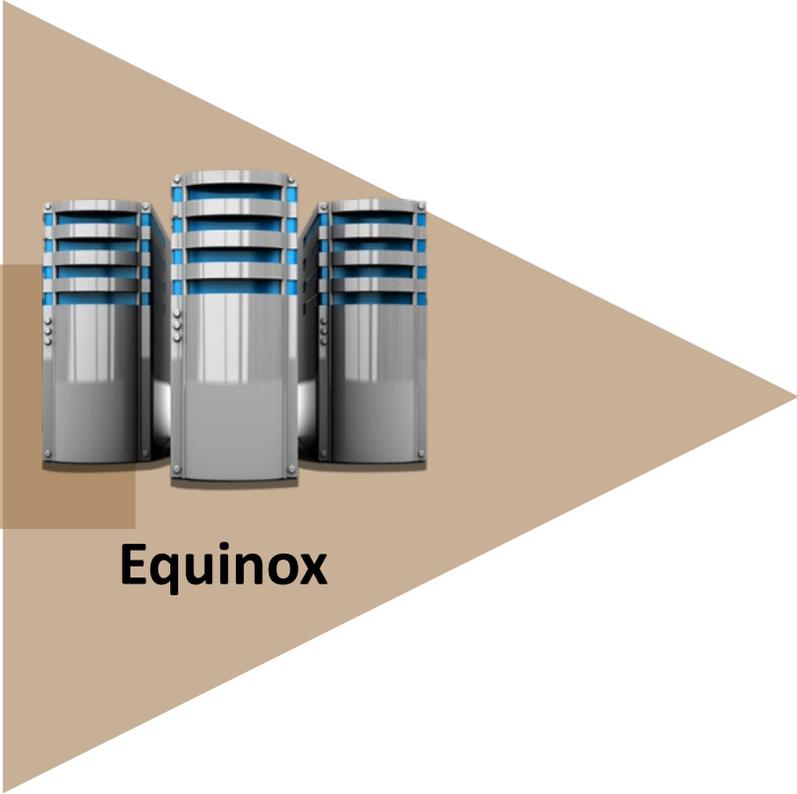
Task 1.2: Strategically grow membership that balances new migrations into the consortium



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

Clark, Monty Daniel II

Refresh Check Out Items Out **Holds** Bills Edit Messages Other

0 1/3 (1) \$ 0.00

Status

Cataloging Administrator
BR1
Internet Filtered
Account created on 6/6/13
Expires on 6/6/16
Last Activity 6/6/13
Last updated on 6/6/13

Holds: 3

- Available: 1
- Drive-Thru: 1

Holds Table:

#	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

Account, Test

Check Out Items Out (0) Holds (0 / 0) Bills (\$0.00) Notes Edit Other Patron Search

Profile: Adult

Home Library: [Barcode] Submit

Net Access: Filtered

Date of Birth: 01/01/1900

Parent/Guardian: [Date Options] 07/31/2023

Last Activity: 07/19/2023

Last Updated: 07/19/2023

Create Date: 01/22/2019

Expire Date: 07/19/2026

Fines Owed: \$0.00

Items Out: 0

Overdue: 0

Long Overdue: 0

Claimed Returned: 0

Lost: 0

Non-Cataloged: 0

Holds: 0 / 0

Barcode [] Submit

Date Options [] 07/31/2023

08 : 56 AM

Actions Rows 25 Page 1

[] Balance Barcode Circ ID Call Num Due Date Family N Location Remaini Title Circulati Circulati Owning Alerts

No Items To Display

Strict Barcode Quick Receipt Done

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. At the top left is the logo for NC Cardinal. Below it is a navigation bar with links for Home, Help, Kid Search, WCPL, NC LIVE, and Optimal Results. A search bar is present with 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 includes various filters and options such as 'Advanced Search', 'Sort by Relevance', 'Show Fewer Details', 'Limit to Available Items', 'Group Formats and Editions', and 'Show Results from'. The book details include the title, author, publisher, ISBN, edition, and physical description. The table below lists the library, shelving location, call number, and status for each copy.

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

Select 1 - 10 0 selected titles

Harry Potter and the goblet of fire Place Hold

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

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

Harry Potter and the goblet of fire Place Hold Add to basket

Rowling, J. K.

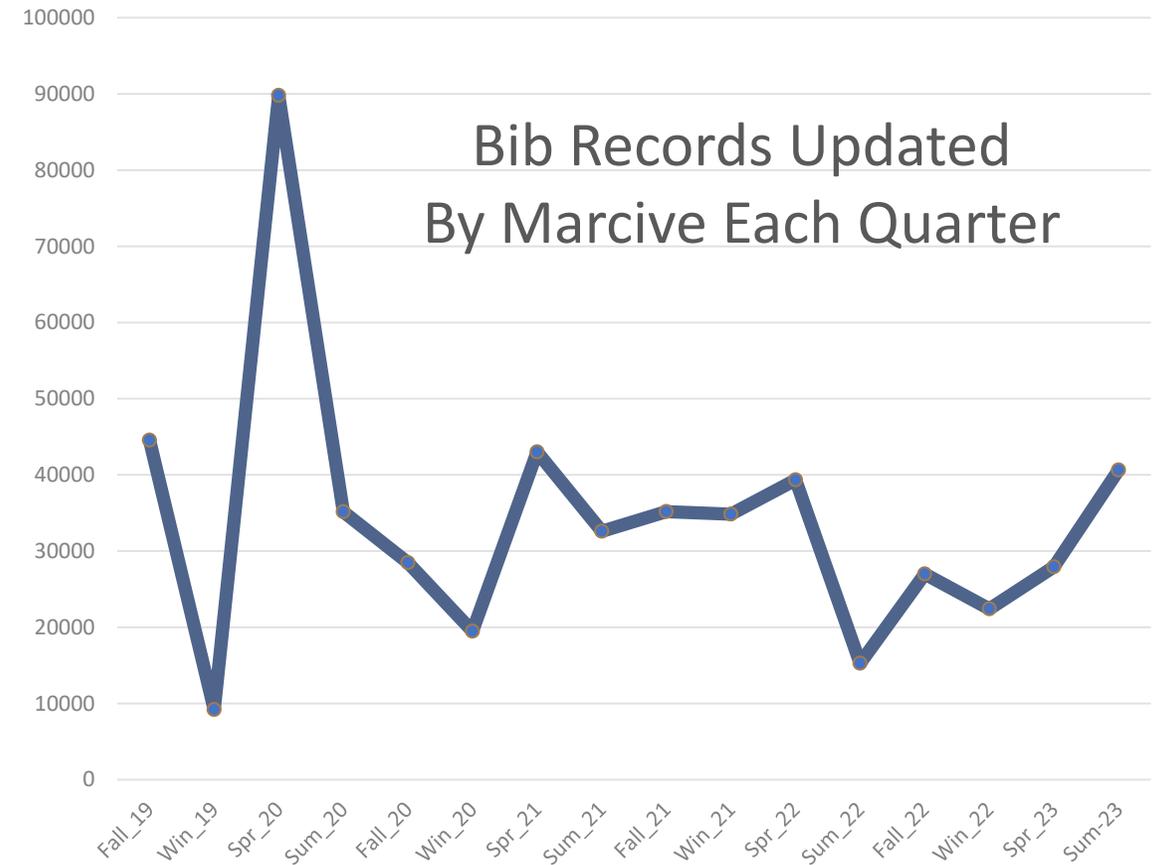
Task 2.1: Design (staff and patron) experiences that remove barriers, facilitate access to additional resources (e.g. eBooks), and delight users

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)340107
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)441306
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.

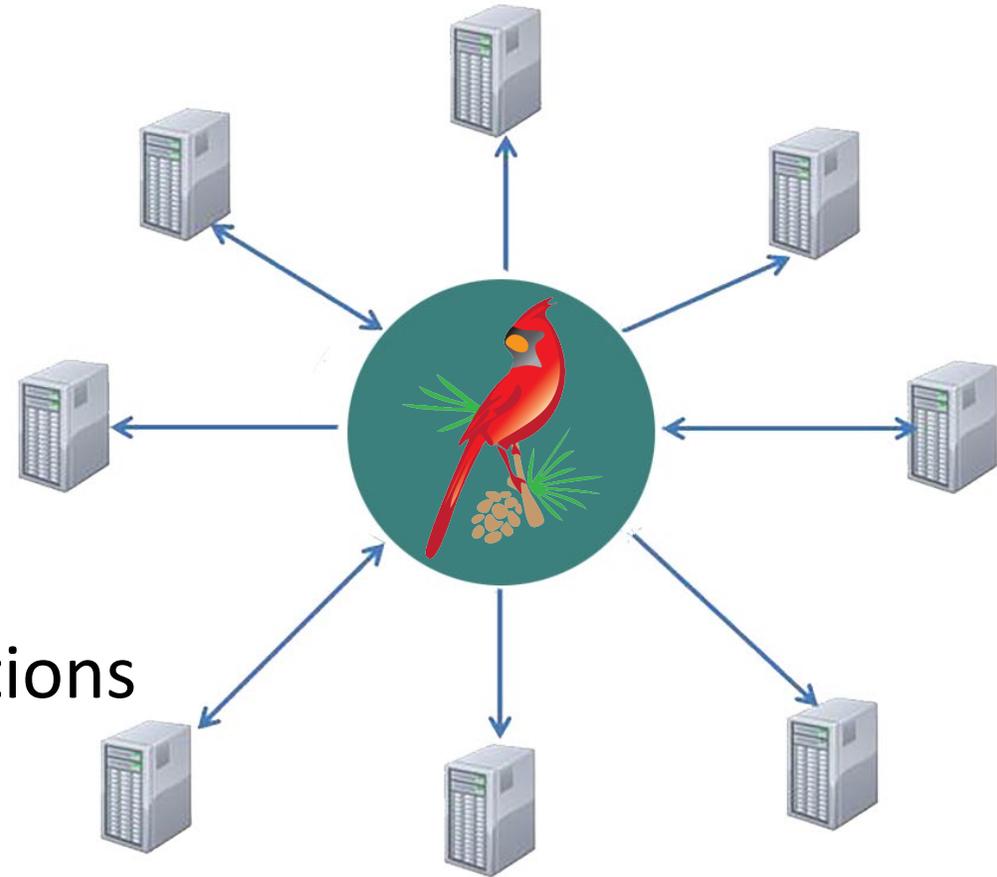
```



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. If new topics arise, this document will be amended. If you have any questions, please contact the support team. This document share under the same license as the Evergreen Documentation.

- [1. Training and Learning](#)
 - [1.1. NC Cardinal res](#)
 - [1.2. External Resou](#)
- [2. Acquisitions Basics](#)
 - [2.1. Getting Started](#)
 - [2.2. Acquisition Wor](#)
 - [2.3. Acquisitions Pro](#)
 - [2.4. Definitions](#)
- [3. Acquisitions Administra](#)
 - [3.1. Searching in Ac](#)
 - [3.2. Funding Source](#)
 - [3.3. Funds](#)
 - [3.4. Providers](#)
 - [3.5. Cancel/Delay R](#)
 - [3.6. Claiming](#)
 - [3.7. Currency Types](#)
 - [3.8. Distribution For](#)
 - [3.9. Electronic Data](#)
 - [3.10. Exchange Rat](#)
- [4. Selection Lists and Pur](#)

Reports in Evergreen

Documentation of the reporting process in Evergreen. This is a living document that incorporates elements of Evergreen Documentation. If new topics arise, this document will be amended. If you have any questions, please contact the support team. This document share under the same license as the Evergreen Documentation.

- [1. Introduction to Reports](#)
 - [1.1. Reports Overview W](#)
 - [1.2. Reports Permission](#)
- [2. Simple Reports](#)
 - [2.1. Differences between](#)
 - [2.2. Simple Reports Inter](#)
 - [2.3. Types of Simple Rep](#)
 - [2.4. Creating a Simple R](#)
 - [2.5. Editing a Simple Rep](#)
 - [2.6. Administration](#)
- [3. Folders](#)
 - [3.1. What Are Report Fol](#)
 - [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. If new topics arise, this document will be amended. If you have any questions, please contact the support team. This document share under the same license as the Evergreen Documentation.

- [1. Managing Evergreen Staff](#)
 - [1.1. Purpose of Login A](#)
 - [1.2. Staff Permission Gr](#)
 - [1.3. System Login Acce](#)
 - [1.4. Creating a New Log](#)
 - [1.5. Transferring Report](#)
 - [1.6. Transferring Item T](#)
 - [1.7. Disabling Staff Log](#)
 - [1.8. How to Change the](#)
- [2. Client & Workstation Setup](#)
 - [2.1. Network Requirem](#)
 - [2.2. Should You Use Ha](#)
 - [2.3. If You Use Hatch](#)

Circulation in Evergreen

This is a living document that incorporates elements of Evergreen Documentation. If new topics arise, this document will be amended. If you have any questions, please contact the support team. This document share under the same license as the Evergreen Documentation.

- [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 V](#)
 - [3.1. Setting Search and Sound](#)
 - [3.2. Setting Display](#)
 - [3.3. Setting Print](#)

Cataloging in NC Cardinal

This living document outlines and provides best practices for cataloging in NC Cardinal. If new topics arise, this document will be amended. If you have any questions, please contact the support team. This document share under the same license as the Evergreen Documentation.

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](#)

[2.7. Client Setup](#)



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 for membership and staff

Community Engagement and Partnerships

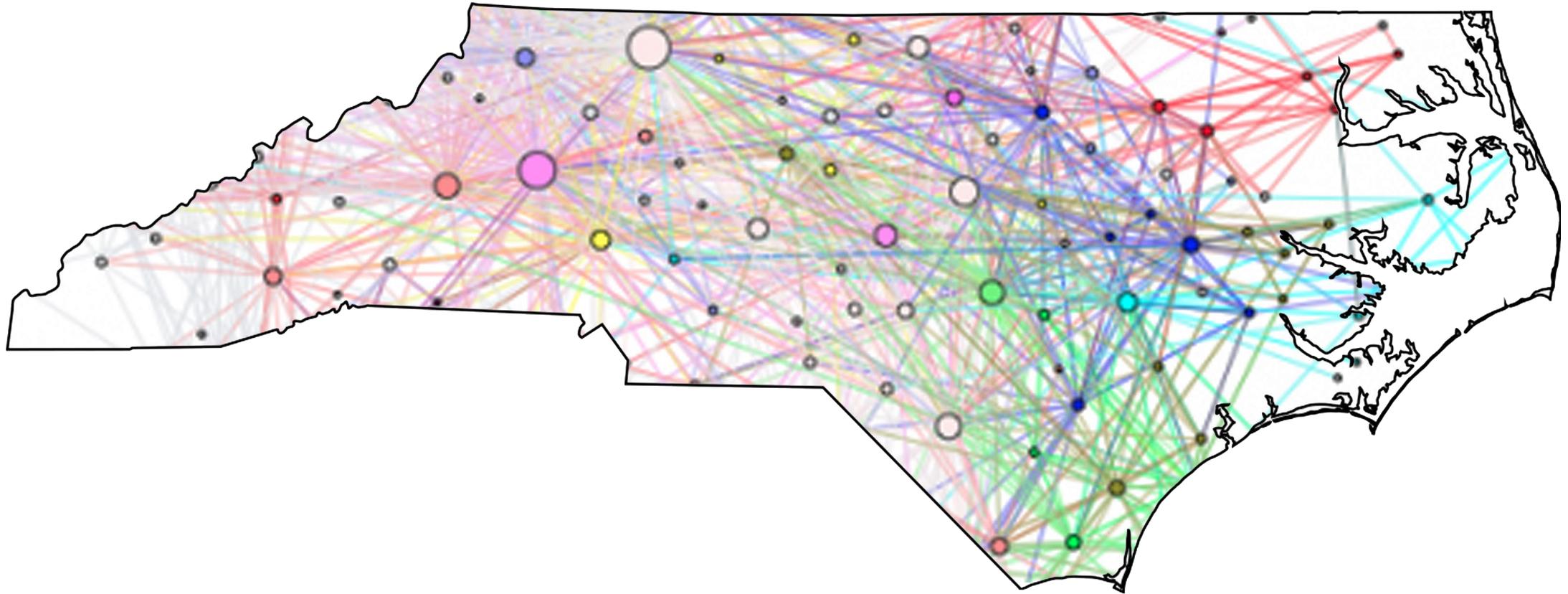


Task 4.3: Develop additional opportunities for member and NC Cardinal staff to participate in the Evergreen and open source communities

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

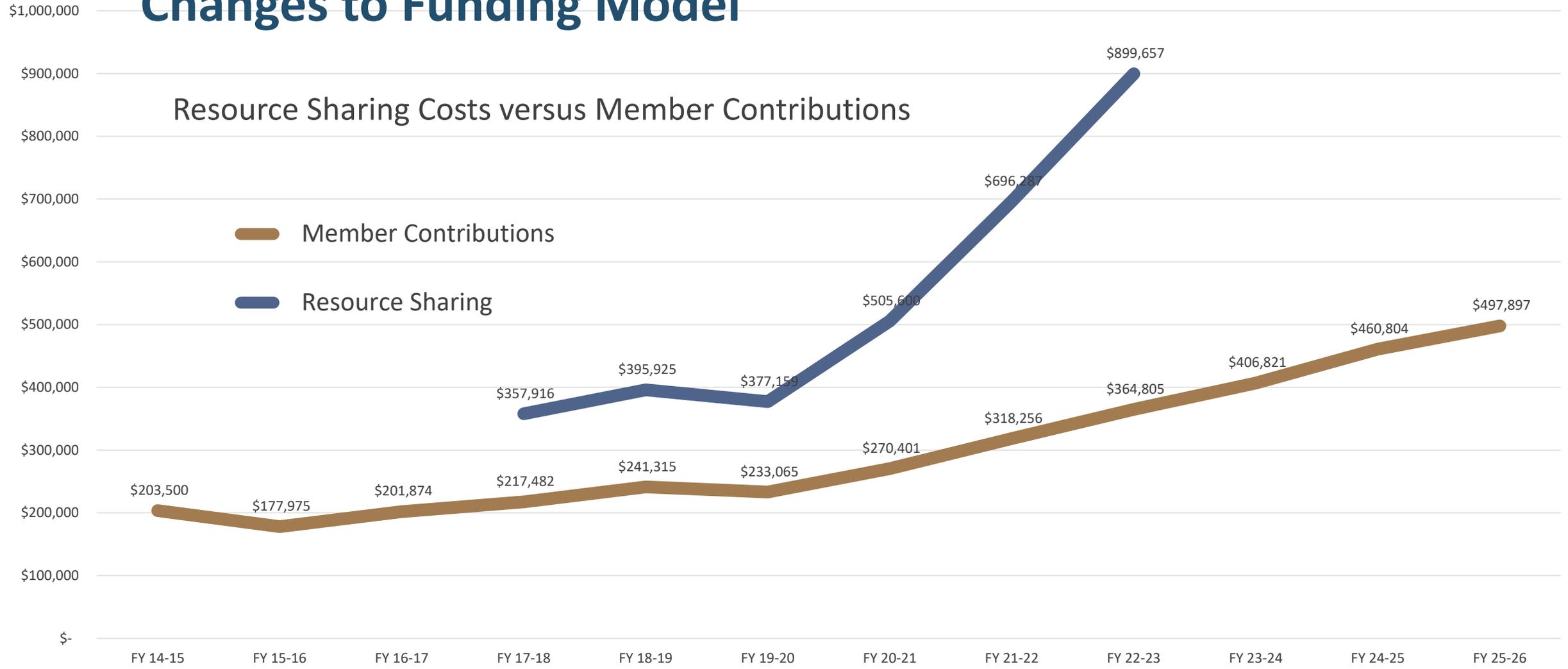


Task 3.8: Refine resource sharing operations and practices to optimize cost and benefit



Changes to Funding Model

Resource Sharing Costs versus Member Contributions



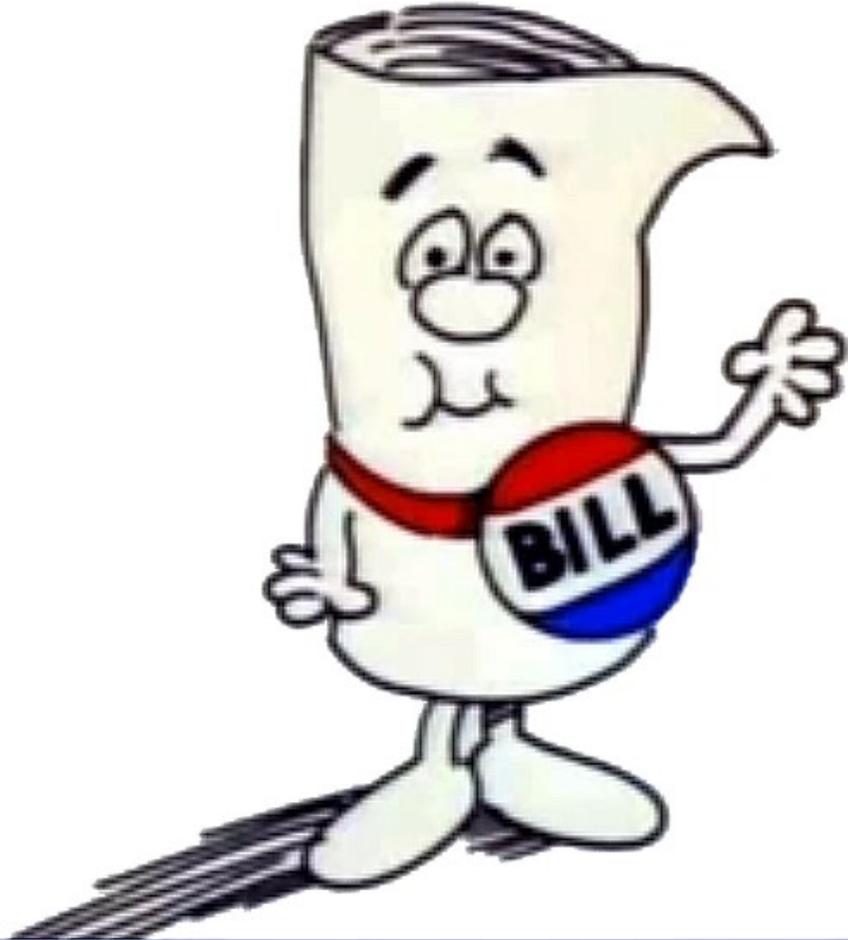
Task 3.3: Build an operational and funding model that incrementally creates organizational self-sustainability

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 item is either 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 requesting hold patron will remain in line for the item. Patrons whose NC Cardinal card is not active may not be able to check out the item.
- If you would like to put something on hold for one of your Staff or Outreach accounts that have a longer hold period, you may wish to refer to this [page](#) for instructions.
- If one of your patrons lost an item that was borrowed through resource sharing, it is best to check with the owning library for their policy. If a patron replaces a lost or damaged item with an exact copy (same ISBN), the patron may be able 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