



Technical Services Manager Monthly Report

Date: June 18, 2026
Staff Name: Dea Nowell
Time Period Report Covers: May 2026

Position Purpose Statement

The purpose of this position is to support the UCSLD member libraries' abilities to provide services and participate in consortia activities through cataloging (maintaining the integrity of the bibliographic database and authority control) and technical support. Additionally, this position also administratively & technologically supports the UCSLD Board of Directors and staff.

Statistics

cataloging statistics:

<i>date</i>	<i>* Item additions to Sage</i>	<i>* Item deletions from Sage</i>	<i>* Item corrections in Sage</i>	<i>Temporary bibs upgraded</i>	<i>*** Sage bib fixes</i>	<i>*** Sage bib merges</i>	<i>*** Sage bib deletes</i>	<i>*** Sage bib overlays</i>
May 2026	279	62	23	0	47	7	0	0

* for the most part all libraries in District: except Hermiston, Milton-Freewater, Pendleton, Umatilla, & Weston [though I do add a few bibs for Umatilla, counted in here, but not items]

*** looking strictly at bibliographic records, not necessarily all are related to District libraries' holdings

reports run:

regular monthly:

- item creation stats: all 12 public libraries
- temp bibs missed being put into bucket
- OCLC CatExpress stats (added & deleted)
- circulation related: Adams PL - 3, Athena PL - 3, Milton-Freewater PL - 5, Pilot Rock PL - 1, Stanfield PL - 4
- pre-cataloged items: Milton-Freewater PL - 1, Ukiah P/SL - 1
- in process items: Milton-Freewater PL - 1

additional reports:

- Juvenile Non-Fiction weeding (no circ in 3 years) - Athena PL
- pre-cataloged items & in process items (for review at site visits): Echo PL (2x), Umatilla PL, Helix PL, Athena PL, Pilot Rock PL, Weston PL, Milton-Freewater PL, Hermiston PL, Adams PL
- follow-up clean up pre-cat report - Pilot Rock PL

Meetings and Site Visits

- UCSLD In-Service [via Zoom]: 1 (5/1)
- Staff/Safety meeting [via Teams]: 1 (5/12)
- Sage Circulation work group meeting [via Zoom]: 1 (5/12)
- Sage Library Things discussion [via Zoom]: 1 (5/20)
- Sage Cataloging Mentor group meeting [via Zoom]: 1 (5/27)
- UCSLD Budget Hearing & Board meetings [via Zoom]: 1 (5/28)
- meet weekly w/ Heather [via MS Teams]: 4 (5/4, 5/11, 5/18, 5/26)
- virtual site visits [via Zoom]: 9+ - Umatilla PL (5/6), Helix PL (5/6), Athena PL (5/8), Pilot Rock PL (5/11), Echo PL (5/11), Weston PL (5/13), Milton-Freewater PL (5/15), Adams PL (5/21), Hermiston PL (5/22) [note: had 3 no shows & rescheduled site visits]
- webinars/trainings attended [virtual]:
 - Vector Solutions: Creating a respectful workplace - updated (5/7)

- WebJunction web.: Where is AI in 2026, & where is it going (5/21)
- Vector Solutions: Public meetings law (5/28 w/ Board)

visits to/with District Libraries:

Adams PL - 11 [email, phone, text]

- emailed pre-cataloged items & in process items reports (for site visit) & Zoom link
- called to see if planning to attend site visit (one of assistants answered - director off)
- text message exchanges with director re. site visit & rescheduling
- emailed possible dates & times for rescheduling site visit
- called re. scheduling make-up site visit after director was back in library
- emailed new site visit Zoom link
- called (2x) to double check pagination for an item scan - just rang & rang, no voicemail; then emailed (3)
- called (no answer or voicemail), so emailed, then called when responded... re. ?s on 2 items (2)

Athena PL - 2 [email]

- emailed pre-cataloged items & in process items reports (for site visit) & Zoom link
- emailed requested Juvenile NF weeding report

Echo PL - 11 [email, phone]

- cc'd reply to Jon Georg email re. communication w/ an Echo lib. patron who was upset that an item they had checked out & returned over weekend had not been checked in & hadn't gotten a call back from voicemails left...
- emailed a reply to lib. & Jon Georg that there wasn't a glitch in the system - item was checked out as a pre-cataloged item using the title in the barcode field (not the barcode)
- emailed pre-cataloged items & in process items reports (for site visit) & Zoom link
- called during scheduled site visit - no answer (left 2 messages) & also emailed re. (5)
- emailed times/dates I could do a make-up site visit... then set a time for date selected & then emailed Zoom link info. for (3)
- emailed new pre-cataloged items & in process items reports (for site visit) & Zoom link

Helix PL - 2 [email]

- emailed in process items report (for site visit) & Zoom link
- emailed re. additional information for one of items sent to add to catalog

Hermiston PL - 6 [email, phone]

- emailed pre-cataloged items & in process items reports, as well as other documents (for site visit) & Zoom link
- called cataloger (2x) checking to see if planning to attend site visit (left message 1x) & sent a follow-up email asking about a possible rescheduling (3)
- emailed reply to cataloger re. reason missed site visit & availability, asked her to verify time; then sent a new Zoom link... (2)

Milton-Freewater PL - 5 [email]

- emailed a reply to ? about items for site visit, that I was working on the reports, etc. to send... & then emailed pre-cataloged items & in process items reports, as well as other documents & items to pull (for site visit) & Zoom link; then emailed that 1 of items was currently checked out... (3)
- emailed follow-up items we spoke about during site visit (2)

Pilot Rock PL - 2 [email, phone]

- emailed pre-cataloged items & in process items reports (for site visit) & Zoom link
- called to check on one of pre-cataloged items scans sent

Umatilla PL - 3 [email]

- emailed in process items report, as well as other documents (for site visit) & Zoom link
- emailed follow-up information from site visit
- emailed new CAT3 cataloger that I wasn't ignoring her request wanting to start CAT2 training & how to get started; I hope to get information pulled together & sent off in a few days

Weston PL - 1 [email]

- emailed pre-cataloged items & in process items reports, as well as other documents (for site visit) & Zoom link

Beth Ross [Sage Library System - Systems Administrator] - 4 [email, phone]

- emailed a thanks for Cat-Express bill & then asked a ? about whether had taken into acct. that we went over our subscription amt. last year; & thanks (3)

- called to follow-up from an earlier email question about a process at one of our libraries
- Jon Georg [Sage Library System Specialist] – 1 [email]
- replied to email addressed to myself & Echo PL (rec'd during in-service) re. communication w/ a lib. patron who was upset that an item they had checked out & returned over weekend had not been checked in & hadn't gotten a call back from voicemails left... cc'd lib. director using the correct email address

Projects and Progress

- Spring 2026 virtual site visits (visits completed, w/ some items to follow-up on) ~85% complete
- work on temp bib items seen during last 2 trips – (*nothing new*)
- 1Password (pswd. manager) – full staff implementation as staff time permits – (ongoing)
- file retention system – *aware there will be some changes coming up* – (ongoing)
- website compliance – completed and ongoing
- website portal for library directors: *drafted out ...* – (*same as last several months*)
- researching how to set up admin. user & standard user in Windows 11 (*nothing new*)
- technology inventory/tracking spreadsheet created & sent to Heather ~90% complete
- succession planning documents – draft begun & *continuing to work on...*

Accomplishments

- website work:
 - Board mtg. agenda, minutes, & support doc.'s posted
 - posted Budget Hearing notice & documents
 - May library happenings video posted
- Sage Cataloging Mentor:
 - replied to ? from Beth Ross directed to mentors about adding a particular circ modifier
 - emailed a response to Josephy Lib. cataloger re. note rec'd that she had made a mistake and didn't know how to fix it > suggested contacting the impacted lib. & gave her the catalogers' emails
 - replied to ? from Beth Ross directed to mentors re. changing Leader Type for book club kits to get both kit & book icons to show
 - reviewed 6 April new bibs [imported &/or created]
- Sage User Council:
 - emailed Perry Stokes (Sage fiscal agent) re. number of members for Membership mtg. quorum (2x); & thanks (3)
 - drafted agenda for Sage Annual Membership/User Council Meeting & emailed to Beth; follow-up email sent (2)
 - emailed thanks to Perry Stokes for looping me re. a conversation about a school library asking to leave Sage & following procedure
 - emailed apology to Sage-Lib email list for a miscommunication of time & clarification of correct time for the upcoming Sage Annual Membership meeting
 - emailed Sage User Council proposed by-laws changes to Sage-lib email group + reminder note about RSVPing to Kristin Williams if haven't (& clarifying meeting time)
 - emailed Kristin Williams (BMCC) to see if she had a room assignment for the Sage Annual Membership meeting so I could add to email with agenda... & thank you (2)
 - emailed Sage Annual Membership Meeting agenda, proposed by-laws changes, & March 17th Sage User Council minutes to Sage-lib email list (2)
 - emailed Sage Nominating Committee (+ Beth) an updated list of Council Representative nominations as far as I knew & asking if anyone had any others to add
 - replied to email from Darci Hanning (SLO) about not having rec'd the Sage Annual Membership meeting information, & fwd Zoom link & documents
 - sent Zoom link reminder for Sage Annual Membership / User Council mtg. to Sage-Lib.
 - attended/chaired the Sage Annual Membership / User Council meeting
 - emailed Sage Annual Membership meeting attendee list to Jon Georg following mtg

Feedback received:

- 5/6/26 - email reply from Susie Hansen (Umatilla PL director) after I sent her some items we talked about during our site visit that needed some work, along with some bibliographic record cheat sheets for a couple of formats: "Thanks for all your help Dea!"
- 5/6/26 - email reply from Kollie Kahle Riggs, cataloger at Joseph Lib.) after I sent her a requested report of their inventory with prices listed: "Thanks so much for doing this report. This is very helpful."

Upcoming Events - Activities

- Sage Cataloging workgroup meeting - June 2
- web.: Mastering DocAccess: domain settings - June 3
- web.: PERS & the Treasury - June 5
- Sage Circulation Work Group meeting - June 9
- Staff/Safety meeting - June 9
- Sage Library Things discussion - June 17
- UCSLD Board meeting - June 18
- Juneteenth holiday - June 19
- Sage Reports Work Group meeting - June 23
- Sage Cataloging Mentor meeting - June 24
- taking Sundays off (vacation) through Labor Day weekend
- Independence Day holiday (observed) - July 3