



UMATILLA COUNTY SPECIAL LIBRARY DISTRICT

Strengthening our community libraries

PO Box 1689
425 S Main Street
Pendleton, OR 97801

Phone (541) 276-6449

Technical Services Manager Monthly Report

Date: October 29, 2026
Staff Name: Dea Nowell
Time Period Report Covers: August & September 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>
Aug. 2026	225	22	7	0	28	4	0	0
Sept. 2026	0	0	0	0	0	0	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: (run in August only)

- item creation stats: all 12 public libraries
- circulation related: Adams PL - 3, Athena PL - 3, Milton-Freewater PL - 5, Pilot Rock PL - 1, Stanfield PL - 3
- pre-cataloged items: Milton-Freewater PL - 1, Ukiah P/SL - 1
- in process items: Milton-Freewater PL - 1

additional reports:

- Adult Non-Fiction weeding (no circ in 5 years) - Echo PL

Meetings and Site Visits

- Sage Cataloging work group meeting [via Zoom]: 1 (8/4)
- Staff/Safety meeting [via Teams]: 2 (8/10, 9/15)
- Sage Circulation work group meeting [via Zoom]: 1 (8/11)
- met with Alexa Rose [college graduate (from Echo), investigating various career options] [via Zoom]: 1 (8/12)
- Sage User Council meeting (chaired) [via Zoom]: 1 (9/15)
- UCSLD Board meeting [via Zoom]: 1 (8/27)
- meet weekly w/ Heather [via MS Teams & FaceTime]: 5 (8/4, 8/17, 8/24, 8/31, 9/14)
- webinars/trainings attended [virtual]:
 - Vector Solutions: Dangers of distracted driving (8/6)
 - Vector Solutions: Cybersecurity awareness for employees: classifying & safeguarding data for corporate & personal use (9/14)

visits to/with District Libraries:

all libraries - 3 [email]

- emailed library directors each an invitation to the UCSLD library director portal

- emailed catalogers & the directors at smaller libraries an update on my office availability becoming sporadic due to my Mom's declining situation
- emailed catalogers & the directors at smaller libraries (+ BMCC Lib. Dir.) of my Mom's passing & that I would be out of the office thru end of Sept.; also informed them I would be headed to Umatilla Co. end of Oct. thru mid-Nov. for site visits & in-service; additionally, I thanked them for their "patience & understanding as I traveled this journey with my Mom over the past several months"

Adams PL - 2 [email, phone]

- emailed monthly statistics
- returned missed call re. adding OR state parks day use parking permits into catalog

Athena PL - 1 [email]

- emailed monthly statistics

Echo PL - 1 [email]

- emailed requested weeding report

Milton-Freewater PL - 15 [email, phone, Zoom]

- emailed cataloger monthly reports & director monthly statistics (2)
- emailed cataloger & director update on bilingual set cataloging project & suggested dates/times I could meet via Zoom re. going thru documentation & cataloging an item or 2 together (2)
- called cataloger to clarify specific time re. Zoom mtg. & emailed a Zoom link (2)
- emailed bilingual set instructions & template to cataloger
- emailed cataloger & director re. requested shelving location for bilingual sets
- emailed cataloger updated bilingual set instructions & template
- met w/ cataloger (via Zoom) to catalog a bilingual set or 2
- emailed cataloger I was able to make the Zoom session recurring for next week, as meeting again
- emailed cataloger feedback on a completed bilingual set record (2)
- emailed cataloger a head's up that I may not be able to meet the next day due to my Mom's situation & that I'd seen she'd sent me a couple more bilingual set records to review & then an email the next morning that I did indeed need to cancel (2)

Pilot Rock PL - 1 [email]

- emailed monthly statistics

Stanfield PL - 4 [email, phone]

- emailed monthly statistics
- call rec'd & returned - walked through loading of receipt templates
- called to check pagination on an item
- returned a missed call re. ?s about adding some Library of Things items

Ukiah P/SL - 1 [email]

- emailed monthly report

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

- emailed thanks for setting up circulation & hold policies for Adams & Athena museum-park passes
- called re. couple ?s re. a couple of fields for use in bilingual set cataloging & later a follow-up thanks (2)
- emailed reply re. something mentioned at Sage circulation workgroup mtg. that I could not do & thanks for adjusting the settings to allow me to see them...

Projects and Progress

- 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: invitations sent out after introduced to directors at Aug. Director's meeting
- researching how to set up admin. user & standard user in Windows 11 *(not much new)*
- technology inventory/tracking spreadsheet updated & sent to Heather - completed [also got all the Norton subscription licenses updated on all laptops & phones; & MS bitlocker info. for all laptops updated, printed, & placed into files in District office]
- succession planning documents - continuing to work on... *(unfortunately nothing new)*

Accomplishments

- website work:
 - updated Board Members page info. (Pres. & V.P.)
 - Board mtg. agenda, minutes, & support doc.'s posted (Aug. & Sept.)
 - August library happenings video posted
 - Heather's Aug. 5th & Sept. 2nd EO Go articles posted
- Sage Cataloging Mentor:
 - bilingual set cataloging meeting (via Zoom) w/ Lisa Hauner (OTLD cataloger) to go thru template & documentation I'd created for refinements &/or clarifications
 - emailed reply to Alexa Rose [college graduate (from Echo)] re. a meeting date & Zoom link (2)
 - emailed Sage cataloging mentors for feedback on a couple of fields' usage in bilingual set records... & a clarification (2)
 - emailed Lisa Hauner asking if willing to look over updates/changes to bilingual set info. & reply (2)
 - called Lisa Hauner re. follow-up email questions re. above...
 - emailed Sage cataloging mentors trying to wrap up feedback, etc., re. bilingual set cataloging (2)
 - emailed reply to new BMCC Lib. director's questions about Cat2 test (4)
 - emailed Heather Spry (cc'ing Beth Ross) re. 2 incorrect links listed in the Cat2 test & replies (4)
 - emailed Sage-Cat email list that we were cancelling the Library [of] Things discussion for the month of August
 - emailed reply to Alexa Rose's thank you
 - emailed Sage cataloging mentors an update on my office availability becoming sporadic due to my Mom's situation & that I doubted I'd make to the next week's meeting
 - emailed reply to new BMCC Lib. director's question about whether there has been any word on her Cat2 test results (cc'd Heather Spry) (2)
 - fwd. BMCC Lib. Dir.'s submitted Cat2 test in responded to Heather Spry's email reply that hadn't received test
 - emailed Sage cataloging mentors that my Mom had passed & that I would be out of the office through end of Sept., (missing mentor mtg.), & that may miss Oct.'s due to traveling to Umatilla Co....
 - reviewed a few 2026 new bibs (46)
- Sage User Council:
 - drafted Sage User Council September 2026 agenda, & emailed to Beth Ross, Jon Georg, Perry Stokes (fiscal agent) asking to review
 - emailed Beth Ross, Jon Georg, & Perry Stokes re. drafted User Council agenda
 - emailed Sage User Council Representatives [cc to: Beth Ross, Jon Georg, & Darci Hanning (SLO)] the upcoming mtg. agenda, Zoom link, & a reminder if not able to attend mtg. there is a provision to designate an alternate rep. as it is important to have a quorum to keep business moving along... as did not have a quorum at previous mtg.
 - emailed Sage User Council mtg. agenda & Zoom link to Sage-Lib email list; & sent a reminder day before meeting (2)
 - emailed Beth Ross & Jon Georg that I was planning to be at the Sage User Council mtg. the following day, however if I don't make it, &/or that I may not be able to lead it - I wanted to give them a heads up
 - fwd email from Darci Hanning (SLO) that would not be able to attend the Sage User Council mtg. that day & that someone would need to report back to her re. the mtg.
 - replied to Darci Hanning's email that someone would be getting back to her later about how the meeting goes, though it will probably not be me...

Feedback received:

- 8/4/26 - email reply from Lisa Hauner (fellow cataloging mentor) re. ongoing back & forth with reviewing & giving feedback to the instructions and template I created for bilingual set cataloging: "...That was a log of work Dea! My comments are the teeny tiny quirks for duolingos... This is an excellent 'how-to' sheet for us. THANK YOU!!"

- 8/5/26 – another email reply from Lisa Hauner re. bilingual set cataloging instructions/template: “OOHH!! Love the intro! Good details for usage.... 041: **chef’s kiss** Perfecto!!... LOVE THE 245!!!! Nailed it!... **salute**”
- 8/5/26 – during phone call with Lisa Hauner following up on a couple of questions raised in her email, she stated: “...the 505 is a perfect way to solve that one...”

Upcoming Events - Activities

- back to work – October 1
- Sage catalog upgrade training – October 2, 6, 7, & 8 (upgrade occurring early morning Oct. 13th)
- Sage Cataloging Work Group meeting – October 6
- Library IQ meeting (along with Heather) – October 6
- Staff/Safety meeting – October 13
- Sage Circulation Work Group meeting – October 13
- Sage Library [of] Things discussion – October 21
- Sage Reports Work Group meeting – October 27
- Sage Cataloging Mentor meeting – October 28
- UCSLD Board Meeting – October 29
- in Umatilla County – October 27 (pm) thru November 17 (am) *[site visits, in-service, & office work]*