

Technical Services Manager Monthly Report

Date: July 23, 2026
Staff Name: Dea Nowell
Time Period Report Covers: June 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>
June 2026	317	229	44	0	55	2	2	1

* 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 – 3
- pre-cataloged items: Milton-Freewater PL – 1, Ukiah P/SL – 1
- in process items: Milton-Freewater PL – 1

additional reports:

- Circulation Modifier report pulled for Adams, Athena, Echo, Helix, Pilot Rock, Stanfield, Ukiah, & Weston PLs to look for needed clean-up, so some clean-up can be done on unnecessary circ modifiers in the Sage catalog
- SLO statistics reports reviewed for updating the revenue charting changes for Heather since last put together...

Meetings and Site Visits

- Sage Cataloging work group meeting [via Zoom]: 1 (6/2)
- LBL ESD/Heather – Cyber Ready Assessment Report follow-up mtg. [via Zoom]: 1 (6/2)
- Staff/Safety meeting [via Teams]: 1 (6/9)
- Sage Circulation work group meeting [via Zoom]: 1 (6/9)
- Sage Library Things discussion [via Zoom]: 1 (6/17)
- UCSLD Board meeting [via Zoom]: 1 (6/18)
- Sage Reports work group meeting [via Zoom]: 1 (6/23)
- Sage Cataloging Mentor group meeting [via Zoom]: 1 (6/24)
- meet weekly w/ Heather [via MS Teams]: 4 (6/1, 6/8, 6/15, 6/29)
- webinars/trainings attended [virtual]:
 - DocAccess web.: Mastering DocAccess: domain settings (6/3)

- Vector Solutions: Heat illness prevention (6/4)
- PERS web.: PERS & the Treasury (6/5)
- Watched recorded (5/27/26) PCI web.: Bots, books & bedtime stories (6/16)

visits to/with District Libraries:

all libraries - 1 [email]

- email reply to library directors re. Oregon Library Passport Program (cc'ed Beth Ross)

Adams PL - 3 [email, phone]

- emailed monthly statistics to director
- returned missed call re. PNW sections, to see if had the individual shelving locations set up yet
- email w/ wording re. pagination reminder that I read during site visit, along w/ example of an item in the library that includes the items referred to... site visit follow-up task

Athena PL - 3 [email]

- emailed monthly statistics to director
- email w/ wording re. pagination reminder that I read during site visit, along w/ example of an item in the library that includes the items referred to... site visit follow-up task
- email w/ receipt printer template including "you saved..." at the bottom of the checkout template

Echo PL - 1 [email]

- email w/ wording re. pagination reminder that I read during site visit, along w/ example of an item in the library that includes the items referred to... site visit follow-up task

Helix PL - 1 [email]

- email w/ wording re. pagination reminder that I read during site visit, along w/ example of an item in the library that includes the items referred to... site visit follow-up task

Milton-Freewater PL - 3 [email, phone]

- emailed monthly statistics & reports to director and cataloger (2)
- called cataloger re. email about error message when trying to save a bib record - walked through copying & pasting temp bib into Notepad & starting in a new template (&/or restarting the workstation & opening a new template) to see if still get the error message about failing to create new record (still not working, will try again later in day or next day...)

Pilot Rock PL - 3 [email, phone]

- emailed monthly statistics to director
- called following up on request by Beth Ross (at Circulation WG mtg.) to check on the 1 use of profile group of "Student-Dual" with a patron at library
- email w/ wording re. pagination reminder that I read during site visit, along w/ example of an item in the library that includes the items referred to... site visit follow-up task

Stanfield PL - 3 [email, phone]

- emailed monthly statistics to director
- called re. emailed ? about Oregon Library Passport Program
- email w/ wording re. pagination reminder that I read during site visit, along w/ example of an item in the library that includes the items referred to... site visit follow-up task

Ukiah P/SL - 2 [email]

- emailed monthly reports to director
- email w/ wording re. pagination reminder that I read during site visit, along w/ example of an item in the library that includes the items referred to... site visit follow-up task

Umatilla PL - 3 [email, phone]

- email reply to director/cataloger re. ? about editions of a book they have in hand & whether it should be on a different bib record
- called director, at her request, to show where report template that was created in the Reports WG mtg. was located & walked thru how to set up report for the library, as has only used Simple Reports
- emailed reply to staff member who recently became a CAT3 level cataloger, regarding CAT2 certification process and resources
- email reply to director re. an email about a local author who would like them to consider adding her books to their collection... when director took a quick look noticed it appeared that the cover graphic was created by AI, though not sure whether the writing itself was also generated by AI... wondering my thought on this particular situation...
- email w/ wording re. pagination reminder that I read during site visit, along w/ example of an item in the library that includes the items referred to... site visit follow-up task

Weston PL - 3 [email]

- email w/ a link for the website of the company that created the color contrast web tool that I use... site visit follow-up task; & a response to her reply re. being a caregiver for a parent... (2)
- emailed some ?s about an item that I said at site visit I would help fix to be a full serial record instead of a combined monograph/serial record... site visit follow-up task

Beth Ross [Sage Library System - Systems Administrator] – 3 [email]

- emailed a suggested addition for the Circulation WG mtg. having to do with the Oregon Library Passport Program, since it had come up within the District
- emailed to let know I'd gone through the Circulation Modifiers list for the 8 smaller UCSLD libraries and cleaned up several... and reported what I found re. the patron record at one that had Profile Group "Student – Dual", expired in Jan. 2024 & \$0.40 fines; and that I could check with the library on if wanted...
- emailed that I'd spoken to the lib. director re. the Profile Group "Student – Dual" patron, will either delete the acct. or change the profile group (director doesn't know why it was on the patron's record)

Projects and Progress

- Spring 2026 virtual site visits follow-up items – 100% 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 *(not much new)*
- technology inventory/tracking spreadsheet created & sent to Heather ~90% complete
- succession planning documents – draft begun & *continuing to work on...*
- new Board/travel laptop purchased (arrived June 26, 2026) – *still needs to be set up...*

Accomplishments

- ordered new Board/traveler laptop to replace the nearly 4 year old one
- website work:
 - Board mtg. agenda, minutes, & support doc.'s posted
 - June library happenings video posted
 - posted Heather's June 3rd & 24th EO Go! articles
 - cleared several older docs off website & posted several that needed posted...
- Sage Cataloging Mentor:
 - emailed reply to Beth Ross & rest of the cataloging mentors re. our authority vendor's current practice of not removing \$v's in bib records
 - email reply to a graduating college student who reached out to me – had volunteered & worked w/ 2 Echo PL lib. directors over several years – she is interested in data & records management at GLAM [acronym for galleries, libraries, archives, & museums] institutions & exploring her career options as she plans for graduate school; she said she would love to hear more "about my career trajectory in the library" > I suggested a date; replied when got back to me much later about reaching out when comes back from a trip... (2)
 - email reply to another mentor & rest of mentors re. a ? about extra spaces before a number in one of the number fields...
 - emailed a quick clarifying ? to another mentor regarding a Spanish/English bilingual book & a thank you & a compliment on all her hard work & what she has accomplished... (3)
 - reviewed 65 new (imported &/or created) bibs from May 2026
- Sage User Council:
 - drafted Sage Council July 2026 agenda & sent to Beth Ross & Jon Georg for review...

Feedback received:

- 6/2/26 – email reply from Heather Estrada re. drafted minutes of May 28th Bd. mtg. "Reviewed and returning to you. Looks good. Thanks for doing such a great job with these."
- 6/24/26 – email reply from Lisa Hauner (cataloger at Oregon Trail Lib. Dist & fellow cataloging mentor) after I asked a quick bilingual cataloging question & replied thanks, as well as mentioning a bit that I heard between her & another mentor prior to the Sage cataloging mentor meeting & stating that I was proud of what she has accomplished over the past several years to get to the place she is as cataloger... "Consider yourself a main driving force... I wanted to secure my position, like you, in whatever way I needed to – Spanish came along at the exact right time... But I do appreciate and hold close your approval and kudos. THOSE are the gold stars. For real – Thanks for being the person I wanted to make proud"

Upcoming Events - Activities

- DocAccess webinar: Mastering DocAccess: document overhaul – July 1
 - Independence Day holiday (observed) – July 3
 - TechTalk webinar: Stop the noise: turn off unwanted AI today – July 8
 - meeting w/ Heather for performance review– July 10
 - Virtual AskQC office hours: Get more from your metadata: what's new in MARC 3xx – July 14
 - Sage Circulation Work Group meeting – July 14
 - Staff/Safety meeting – July 14
 - Sage Library Things discussion – July 15
 - Sage User Council meeting – July 21
 - Nat'l Lib. of Medicine webinar: Doing an accessibility audit of your library – July 22
 - UCSLD Board Meeting – July 23
 - Sage Reports Work Group meeting – July 28
 - Sage Cataloging Mentor meeting – July 29
 - taking Sundays off (vacation) through Labor Day weekend
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summary of some FY25-26 year-end statistics:

- 3,183 items added to the catalog (for the most part all District Libraries: except Hermiston, Milton-Freewater, Pendleton, Umatilla)
 - 6,031 items deleted from the catalog (for the most part all District Libraries: except Hermiston, Milton-Freewater, Pendleton, Umatilla)
 - 969 catalog corrections (bib & item records) made in the catalog associated with District Libraries
 - 9 temp bibs were updated
 - 904 new bibs created or imported into the Sage Library System
 - 503 bibs fixes were made in the catalog (an idea of the types of things: correcting author & subject headings to authorized headings, typo & diacritic corrections, item fixes based on parts management, series statement related, Oregon author statements added to bibs, just an unnecessary line or two removed, etc.)
 - 36 bibs were merged in the catalog
 - 4 [empty] bib was deleted from the catalog (bibs with no holdings or items attached)
 - 4 bibs were overlaid in the catalog
 - 202 OCLC CatExpress records were added (records purchased) to the catalog (UCSLD Libraries, except Hermiston & Milton-Freewater)
 - 902 OCLC CatExpress holdings were deleted from OCLC (UCSLD Libraries, except Hermiston & Milton-Freewater)
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