



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: February 24, 2026
Staff Name: Dea Nowell
Time Period Report Covers: January 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>
Jan.. 2026	320	100	278	0	24	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:

- 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, Echo PL - 6, 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:

- weeding reports for all items with no circulation in 10 years - Ukiah P/SL (8)
- patron list - Milton-Freewater PL
- inventory reports for Adult Fiction, Adult NF, and Large Print - Helix PL (3)
- YA shelving locations inventory reports - Athena PL (3)

Meetings and Site Visits

- meeting w/ Streamline Account Manager & Heather re. DocAccess [via Zoom]: 1 (1/9)
- Staff/Safety meeting [via Teams]: 1 (1/13)
- Sage User Council meeting [via Zoom]: 1 (1/20)
- UCSLD Board meeting [via Zoom]: 1 (1/22)
- Sage Cataloging Mentor meeting [via Zoom]: 1 (1/28)
- webinars/trainings attended [virtual]:
 - Vector Solutions: Email and Messaging Safety (1/6)
 - Niche Academy web.: Telling your library story to increase public support (1/7)
 - WebJunction web.: Generative AI & collection development policies: a proactive approach (1/8)
 - [OCLC] Virtual Ask QC office hr.: Understanding LCHS free-floating subdivisions (1/13)
 - Access Ingenuity web.: Meeting Title II accessibility requirements: PDF fixes that matter: remediation basics (1/21)
 - PCI web.: Identifying AI generated books in your library (1/21)

- The Digital Shelf Publishing & Library Forum: Ethical AI in libraries (1/27)
- Washington State Lib.: Accessible lib. websites: structuring webpages for easier navigation (1/28)
- Idaho Commission for Libraries: Info2Go!: Copyright in the age of generative AI: critical updates for librarians (1/29)
- Tech Impact's Microsoft 365 quarterly office hours (1/30)
- meet weekly w/ Heather [via MS Teams]: 4 (1/5, 1/12, 1/20, 1/28)

visits to/with District Libraries:

Adams PL - 5 [phone, email]

- called re. ? she had noted in an email with scans of new items; also talked about the shelving project & not wanting to allow holds during process & how to do that
- called re. the noted odd book & what the cover title is
- emailed that got a response from Beth re. how to set the no holds allowed...
- emailed that I was going to go ahead & turn on Not Holdable for 2 locations noted & double checking regarding "Non-Fiction" section noted... followed up w/ other NF sections (2)

Athena PL - 14 [phone, email]

- called re. email - looks like already changed > will double check others in batch that day; also what going to be sending me - shelving locations needing created, order of process, etc.
- called re. some ?s re. a few items from emails (changes, adds, call # structure, etc.) (2)
- called re. ? about requested weeding lists > decided to do inventory lists instead...
- emailed to double check call number structure for YA graphic novels, before updating them as I moved them to the correct shelving location as noted by library
- emailed response that I'd changed all items shelving location in Christmas novel list & sent a screenshot of all the call #'s changed in the YA Graphic Novel barcodes list
- emailed the 3 YA shelving locations inventory reports we spoke about
- rec'd. voicemail, called back re. a ? about if a way to batch delete expired patrons > yes (got her to documentation); talked about picture books - shifting shelving locations, etc. (2)
- called to verify pages in 2 items (2)
- texted message responding to voicemail re. helping install receipt templates, etc., on new computer rec'd day before
- called later to check on the above needs when did not hear back re. text message > she got it figured out... I verified what done & yes...
- call re. email - problem with a couple of items coming up w/ unnecessary alert message at check-in & another batch needs same fix (texted a picture of barcodes affected)

Helix PL - 3 [phone, email]

- called to clarifying email re. reports > asking for inventory reports
- emailed the 3 requested inventory reports
- emailed re. ? about why something came up that is not what she searched for (based on keyword searching, reminded had spoken about not too long ago)

Milton-Freewater PL - 2 [email]

- emailed director re. requested report & how would be receiving a link to report in catalog workstation (because of the PII in report)
- emailed director instructions of how to pull up list of patrons w/ a specific profile group

Pendleton PL - 2 [Zoom, email]

- Zoom mtg. with cataloger - training on OCLC [CatExpress] WorldShare Record Manager: walked thru searching, quality of records, & value of various levels; setting holdings; exporting records; deleting holdings; & where to find reports
- emailed cataloger some OCLC [CatExpress] simplified cataloging interface links after mtg.

Stanfield PL - 12 [phone, email, Zoom]

- called & left a message re. ? about email sent - asked to call me re.
- call rec'd. - still a bit confused by what she's asking so we went to a Zoom session > what she was seeing she discovered was in the call # of some libraries (it used to show on the browse list summary I think, before we upgraded to current version & Beth hasn't gotten that customization added in...) (3)
- emailed a response to a ? re. deleting older lost items in system & if would leave fines attached
- call rec'd. wondering if I had any more batches of cataloging in my email for them > no... (her phone not always sending); & ? how to barcode a set > talked thru process of how to decide...

- voicemail left & called back... needing help with troubleshooting - not able to log into Sage with circ. computer > walked thru clearing cache... was able to get it back up - shared different levels of instructions on Sage staff portal including next steps...
- email response re. comment that clearing cache changed the receipt printer > noted should have them on the computer somewhere & can be reinstalled, let me know if need help with called, following up to email wanting assistance with re-installing print templates
- call rec'd. re. ? about an item that was sent to Stanfield Secondary School from another lib., how can they tell who it is for (school having issues getting into catalog workstation) > looked & found a way through in transit reports, & passed info. re. along & how I found it
- call rec'd. checking to see if I'd rec'd some emails for cataloging; & talked about a couple of different item types & specifics re. them
- emailed reply re. Library of Things checkout limit & shelving location being non-renewable

Ukiah PL - 1 [email]

- emailed the 8 weeding list reports

Weston PL - 1 [email]

- emailed thanks for sending their new website address to be posted on our website

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

- emailed re. how best to go about turning off allowing holds on items being stored during shelving project at Adams PL; & thanks, etc. (3)

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 >> *with caveat noted below...*
- website accessibility project - all forward facing files are now fully accessible via DocAccess [archived downloadable files are automatically excluded] >> *NOTE: some of the archived downloadable documents are not actually eligible to be archived under the DOJ rulings (such as brand new files being added or files that are actively being referenced to fulfill the current year's transparency/compliance requirements...) I still need to go in & make adjustments to those docs...*
- 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 - partially drafted (& sent to Heather)

Accomplishments

- website work:
 - Board mtg. & work session agendas, minutes, & support doc.'s posted
 - posted Heather's 1/28/26 EO Go! Column
 - posted library happenings video
 - updated Weston PL website information
- Sage Cataloging Mentor:
 - called Kollie Riggs (Joseph Lib.) re. email about not being able to login to Sage catalog > suggested clearing cache or other browsers
 - emailed Kollie Riggs a reply after she let me know that she had gotten back in and what she'd done...
 - emailed Lisa Hauner (OTLD, fellow cataloging mentor) re. ? she posed to mentors re. the depth of a topic for upcoming Cataloging Work Group mtg.
- Sage User Council:
 - emailed Beth Ross in response to survey draft to go out to Sage Membership re. User Council Representatives
 - emailed Perry Stokes (fiscal agent) touching base re. Sage Budget Committee
 - emailed Jon George re. Nov. 18, 2025, meeting minutes
 - drafted User Council mtg. agenda & emailed to Kirsten Wells, Beth Ross, & Jon Georg
 - emailed User Council mtg. link, agenda, & minutes out via Sage-Lib email list

- emailed Perry Stokes that I planned on attending the Zoom meeting he'd scheduled to discuss budget draft & wondering if we should invite other 2 committee members? (2)
- fwd emails to the 2 budget committee members to join us if available & draft budget (2)
- participated in impromptu Zoom Sage Budget Committee meeting
- emailed Sage-Lib email list re. opportunity to be on the Sage Bylaws committee
- emailed response to ? that Kathy Street (OTLD) asked me re. what specific area of Sage bylaws the committee would be looking at
- emailed Darci Hanning to query whether Sage Library System qualified for strategic planning assistance from State Library (a suggestion from User Council meeting) (2)
- emailed Jon Georg & Beth Ross where I found the bylaws on the Sagelib.org website (after Jon noted he could not find them on the website)
- emailed Sage Bylaws special committee re. no further volunteers & proposed the start of work...
- emailed Beth Ross asking if possible to see results from the recent Sage membership survey re. apportionment of Council Rep. – curious about a thing or 2 as look at by-laws

Feedback received:

- 1/12/26 – comment from Cecili Longhorn (Stanfield PL director) after I walked through re-installing print templates following her clearing cache & having to re-register workstation when they couldn't login: "You are a rock star today, and you're just killing it!"
- 1/26/26 – email response from Lili Schmidt (Milton-Freewater PL director) after I sent her instructions for how to pull up a list of patrons with a specific profile group (in this case non-resident membership, since they are changing their library fee schedules, including non-resident fees): "YOU are magical! Thank you so much!"

Upcoming Events - Activities

- Sage Cataloging Work Group meeting – February 3
- Staff/Safety meeting – February 10
- OCLC Cataloging Community mtg. (1st half: Metadata panel: Using AI ethically & effectively) – Feb. 11
- Vacation date – February 15
- Presidents' Day – February 16
- Sage Library Things discussion – February 18
- Zoom w/ Darci Hanning (SLO) re. Sage Library System strategic planning > next FY – Feb. 18
- UCSLD Board meeting – February 24
- Sage Cataloging Mentor meeting – February 25