Technical Services Manager Monthly Report

Date: February 3, 2025

Staff Name: Dea Nowell

Time Period Report Covers: January 2025

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:

date	* Item additions to Sage	* Item deletions from Sage	* Item corrections in Sage	Temporary bibs upgraded	*** Sage bib fixes	*** Sage bib merges	*** Sage bib deletes	*** Sage bib overlays
Jan. 2025	394	227	52	0	80	4	2	9

* 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 stats: all 12 pub. lib.
- temp bibs missed put into bucket
- OCLC CatExpress stats (added & deleted)
- circulation related: Adams PL – 3, Echo – 5, 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:

- Home library patrons' birth dates – Stanfield PL
- Adult Fiction no circ in 5+ years – Athena PL
- Patrons expired 1+ year – Helix PL (2x)
- Patrons with outstanding balances – Helix PL (2x)
- Monthly circulation, ILLs borrowed, ILLs loaned – Athena PL

Meetings and Site Visits

- Sage Library of Things (LoT) discussion [via Zoom]: 1 (1/15)
- Staff/Safety meetings [via MS Teams]: 1 (1/15)
- Sage User Council meeting [via Zoom]: 1 (1/21)
- Sage Cataloging Mentor meeting [via Zoom]: 1 (1/22)
- UCSLD Board meetings [via Zoom]: 1 (1/23)
- webinars/trainings attended [virtual]:
  - Vector Solutions: Severe Storms: Wind, Water & Hail Intrusion (1/7)
  - Library of Congress Jan. 2025 BIBFRAME Update Forum (1/27)
- meet weekly w/ Heather [MS Teams]: 4 (1/6, 1/13, 1/21, 1/27)

visits to/with District Libraries:

Athena PL - 4 [phone, email]
- called re. email stating having some trouble with reports > walked through some portions & double checked what the reports contained...
- emailed that created report templates for 3 monthly reports & placed in Dea shared (UM-ATH) for her access
- emailed the 3 reports as she wasn't finding the shared folder with the templates (2)

Echo PL - 1 [email]
- emailed note re. overdues report, currently getting errors – will send when can figure out

Helix PL - 5 [phone]
- emailed 2 reports requested
- called re. email re. reports not having names attached > spoke about the PII (personally identifiable info.) issue w/ emailing & director recalled that... reran reports w/ names, etc. & sent completed report [link] directly to email & emailed note of where report link would be coming from... (2)
- called to get a missing barcode for an item being added
- email reply to ? about if I'd be coming for spring visit in May, since in-service is then

Milton-Freewater PL - 3 [phone, email]
- email reply to cataloger re. question about getting a list of all book club kits we have in system > easiest way probably to do a subject search of term: book club kits & limiting to search by whichever lib. wanted; though happy to run a report...
- called cataloger re. email about book club kit request > walked through the search method for getting most up-to-date info.
- email reply re. size & pagination difference for matching/adding to an existing bib

Pendleton PL - 1 [email]
- emailed circ. supervisor re. a report she'd asked me about last month that she couldn't locate since the upgrade > emailed that I found it & where, as well as that it seems to run fine...

Stanfield PL - 15 [phone, email]
- returned missed call – spoke with jobs' person, director on phone... will have call me
- rec'd call from director: ? about a report with birthdates > ran, sending completed report [link] directly to her email
- emailed re. report being sent directly to her when completed; w/ a note that I was unable to figure out how to sort the birth date column, so will need to be done manually
- emailed re. above report that can change the format for birth date to words instead of numbers to make it easier to go through and pick out the months... (2)
- called re. 3 items scanned with no info. & one which info. was cut off
- rec'd call re. a title with a 2nd copy > didn't see it... she will resend; also asked about a duplicated barcode on 2 scans
- called re. scan of item w/out a barcode included
- rec'd call re. a 2nd copy of a title wanting age-based holds protection on...
- rec'd call re. a hotspot that went missing, being replaced by an older one & changing barcode on current one > will send the info.
- called re. email about making puzzles a 3-week check out > asked to check an item I changed loan duration to long to see if set up that way... still 1 week > will ask Beth to make adjustment
- called... director in the middle of something, will call back
- rec'd call back – asking ? from Beth about renewals on LoT items > none; director noted got a bk. in, can't pull up > at Item Status enter their barcode exactly as listed (with space...)
- called to verify all Games & LoT items are 1 week (7 day: short loan duration) checkout, except puzzles 3 week (21 day: long loan duration) [14 day is now normal loan duration for LoT circ. modifier]
- emailed that all puzzles now have loan duration of 21 days (no renewals), & rest of LoT's should be 7 days (no renewals); please let me know if something doesn't seem right w/ these

Ukiah P/SL - 1 [email]
- email reply re. ? about how to notate a book with no page numbers

Umatilla PL - 4 [phone, email]
- emailed re. noticing all 7 bibs imported in Dec. were put into temp bibs item bucket... (2)
- called director/cataloger re. email rec'd... spoke about Yoda cards & resources not connecting (directed to Beth on these); also spoke about OCLC as a resource & whether they had access

to; she asked for a list of records she had imported so she could review after further cataloging training…

- emailed requested list of imported records & estimated cost per record for OCLC CatExpress records if they wanted to pursue their own subscription…

Beth Ross [Sage Library System - Systems Administrator] – 12 [email]
- emailed [Beth & Jon] re. an overdues report I run quarterly for a lib. getting "error running report" & "report failed" messages > asking for suggestions, direction, advice, etc.… (3)
- emailed re. overdue report > played a bit more with and got a report to run with info. needed w/ exception of title proper (column is empty)
- email reply re. error message from overdue report run after receiving a note from Beth about enabling the Error text column to see some feedback on what it is complaining about… ; & not seeing new shared template folders
- email reply of what the shared template folders tree looks like on my end (2)
- email reply of thanks for update after she sent me an update on maintenance fixes which fixed the problems with report creation/modification we'd all been having
- email re. changing Stanfield PL's LoT circ modifier to be able to check out for 3 weeks for some items [& follow-up] (4)

Jon Georg [Sage Library System Specialist] – 1 [email]
- emailed [Beth & Jon] re. an overdues report I run quarterly getting "error running report" & "report failed" messages > asking for suggestions, direction, advice, etc.…

Projects and Progress

- site visits follow-up to do's – some done from Sept. trip, w/ more added from Oct. trip
- work on temp bib items seen during fall trips – ~17% complete *(same as last mo.)*
- [cybersecurity] password manager – 1Password subscribed for 1 yr. > full staff implementation as staff time permits - ongoing
- file retention system – worked on, though still more work to do overall (on-going)
- website accessibility project – continuing to learn Adobe Acrobat Pro software for use in making PDFs accessible; website end of Jan.: 296 files (87% overall website accessibility score); 230 not accessible (62 of those archived downloadable) & 65 accessible - ongoing
- website portal for library directors: drafted out a build based on what Susie Hansen had put together earlier for a start… & ran by Heather

Accomplishments

- website work:
  - Board meeting minutes, agendas & support documents posted
  - posted Heather's (1/1/25 & 1/29/25) EO Go! Columns
  - [accessibility project]
- Sage Cataloging Mentor:
  - emailed congratulations to Kolle Riggs (cataloger at Josephy Lib.) on getting to the point of getting her CAT2 test set in ; & replied about an author entry question (2)
  - emailed congratulations to Kolle Riggs (cataloger at Josephy Lib.) on achieving CAT2 permissions
  - emailed note to Heather Spry, Beth Ross, & Jon Georg re. correct spelling of Kolle's name and to Heather Spry about her progress w/cataloger that she took of my mentees
  - emailed Kolle Riggs (Josephy Lib.) re. whether there were any other CAT2 level folks in Wallowa County > 1 at Joseph PL
  - emailed Kolle Riggs reply asking if I'd check over the 1st 2 records she imported
  - reviewed new bibs (December: 116 bibs)

Feedback received:

- 1/8/25 – email from Cecili Longhorn (Stanfield PL director) after I'd sent email about not being able to figure out how to sort birth date column & that they would have to do it manually: "For some reason I though you were magical and it would be easy… LOL"
- 1/16/25 – email from Maura O'Daniel (Pendleton PL circ supervisor) after I'd sent email about finding the report she was looking for: "Yay! Thank you!"

- 1/23/25 – email from Catherine Campbell (Pendleton PL cataloger) after I'd added some bibs to the catalog that she couldn't find bibs for: "That was so fast! Thank you!"
- 1/30/25 – emails from Heather Estrada after I thanked her for sending me the Word format of FY-end reports for last 3 years & mentioned it looked like I'd have to rebuild them … trying small amount through Publisher to see how it works: "I certainly appreciate all your work on this, what a nightmare!" -&- when I emailed her that the FY2020-2021 report was now accessible: "Woo Hoo! Good work!"

Upcoming Events - Activities
- Sage Cataloger work group meeting – February 4
- Staff/Safety meeting – February 11
- President's Day (holiday) – February 17
- Sage LoT (Library of Things) discussion – February 19
- Sage Cataloging Mentor meeting – February 26
- UCSLD Board meeting – February 27