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October 3, 2014

To: Karen Simion, Interim Vice President of Instructional Affairs

Subject: Trip Report
Kosrae Campus LRC Site Visit
September 22-27, 2014

I left Pohnpei on September 22 for a weeklong site visit at the Kosrae Campus Learning Resources Center. The objective of the visit was to train library technician, Michael Williams, on the use of KOHA, an open source library information system that the library is implementing for the purpose of creating a union catalog.

Training

The first two days were spent on configuring the initial setup of KOHA for the Kosrae Campus LRC. Rules had to be defined for circulation, cataloging, patrons, and the library catalog in the system preferences. All the libraries for each campus were added to the KOHA system. Rules defined for each component of the KOHA system were applied to all the campus libraries to maintain consistency in how fines are incurred and how materials are cataloged.

Part of the third day was spent on exporting a small sample of title records from the Follett library system to be imported into the KOHA system. The records were successfully imported into the database using the format from Follett. Cataloging of records was done successfully with the addition of an extra code that can identify the unique call numbers of each record or material. Patron records were a little trickier to import into the KOHA system. They were successfully exported from the Follett system. Importing into the KOHA system required some changes to the way the patron records were set up in the database. On Thursday, we tackled importing of patron records into KOHA and figured out where we made errors thus enabling the records to be successfully imported. A test was made on the new student ID cards that IT had installed a week prior to my arrival. The barcode was accepted, allowing the patron record to be created.

The online public access catalog (OPAC) was setup to allow patrons to search for materials as well as check the status of their library accounts. One added feature of the KOHA OPAC allows patrons to make purchase recommendations if the library does not have what they are looking for. Access to external electronic resources can also be linked directly from the OPAC, enabling quick access and retrieval of resources. Michael and I spent the last day of the visit, going over questions that he had on what we had learned together and finalizing setup of the OPAC and patron database. Michael was assigned to complete the importing of both patron and title records into the KOHA while also maintaining copies of the records on the Follett system.

Outcomes

1. The KOHA system setup was successfully modified to reflect the circulation, cataloging, and OPAC settings that are currently being used by the college libraries using Follett.
2. A small sample of the title records of the Kosrae LRC materials were successfully imported and edited in the KOHA system. Michael would be processing the rest of the materials in batches.
3. A sample of the patron records was successfully imported into the KOHA database after changing the format that the records appeared in. Michael would be processing the rest of the patron records by batches, similar to the title records.
4. Databases for all the campus libraries in the KOHA system were set up for each campus library to await the import of their data.

I returned to Pohnpei on September 26, Saturday afternoon.

Sincerely,



Jennifer Helieisar
Director, Learning Resources Center