

## APPENDIX A

### **CHARGE TO THE PATHFINDER REVIEW COMMITTEE**

**From Library Cabinet, August 20, 2003**

The primary question for the Committee to answer is, "Can the UC Berkeley community discontinue the use of Pathfinder and use the new Melvyl system in its place?"

Cabinet would like the process for deciding this question to proceed in three steps.

- **Step 1:** The Committee will determine the feasibility of discontinuing Pathfinder and report its findings and recommendations to Cabinet.
- **Step 2:** Cabinet will consult with Roundtable and then decide on whether or not to proceed with discontinuing Pathfinder.
- **Step 3:** If the decision is made to discontinue Pathfinder, Cabinet will further charge the Committee to plan and execute this action.

#### **STEP 1: FEASIBILITY STUDY**

##### **Phase 1 - Deliverables**

- A) A prioritized list of the benefits of discontinuing Pathfinder. Include any potential benefits to users, library staff in general, the Systems Office in particular and any other group that may be affected. Areas of cost savings should be identified, but detailed cost/benefit analysis can be deferred to Phase II.
  
- B) A prioritized list of Pathfinder features that would be lost, the impact of these losses on the UC Berkeley Community and the estimated feasibility/difficulty of providing replacement features through CDL or other means. Features should be organized in two major categories, intrinsic and extrinsic (see Appendix I). Priority should be based on importance of the feature together with estimated cost and benefits of recreating it;
  - Include anecdotal evidence and use statistics of each feature.
  - Other public service issues should be included in any analysis of benefits. Issues such as: ease of use for patrons and implications for training and impact on circulation desks and reference desks.
  - Need to identify which priority features CDL can provide locally as opposed to what must be done by Ex Libris.
  - Investigate possibility of sharing UCB programming resources with CDL for Co-Development of prioritized features.

If at the end of Phase 1 the Committee feels that the benefits in discontinuing Pathfinder do not justify the losses of important features, the Committee should report this recommendation to Cabinet, along with the rationale for this recommendation and the above deliverables.

If the Committee feels it is still possible to discontinue Pathfinder after the completion of Phase 1, it should inform Cabinet and proceed to Phase 2.

### **Phase 2 - Deliverables**

- A) Reports from user focus groups of users on the benefits and losses of discontinuing Pathfinder.
- B) Case studies – Is there anything we can learn from the UC Davis experience in this regard? Are there any other campuses that have studied this question?
- C) Cost Analysis Statement to determine any fiscal impact of discontinuing Pathfinder, including programmer's time to implement replacement features compared with programmer's time saved by discontinuing Pathfinder, the monetary costs of providing lost features through other means, etc.
- D) Final recommendations to Cabinet on whether to discontinue Pathfinder and if so, a plan on how to proceed.

The Pathfinder Review Committee should complete Step 1, Phase 1 by Nov 1<sup>st</sup>, 2003. At that time and if necessary, a completion date for Phase 2 will be set by Cabinet in consultation with the Chair of the Pathfinder review committee.

### **Appendix I - Features**

#### **Intrinsic Features**

Intrinsic features pertain to the way records are kept, indexed, searched, and displayed. The following are examples of intrinsic features:

- Inherent functions e.g. record displays, holdings displays, indexing.
- Custom indexing and normalization (massaging) of call numbers etc. The special indexing used at Bancroft, Music Library, and others. (Survey type information)
- In some cases where Pathfinder uses "indexes," Melvyl uses "browse," and "browse" does not support complex searching, limits, and Boolean operators.
- Truncation on unmerged records. (Loss of important UCB information in Melvyl because the UCB record may not be displayed in Melvyl.)
- "Canned" searches: Pathfinder provides a way to create a search and save it as a URL that can be linked on a web page. (example: all ebooks, recent acquisitions at a subject library, etc.)

#### **Extrinsic Features**

Extrinsic features pertain to how Pathfinder interacts with other services that the library provides, whether it be linking between databases, authentication, or other local services. The following are examples of extrinsic features:

- Site Search (the engine behind Pathfinder) also supports other databases (e.g. Ejournals Database.)

- Z39.50 interface for third party databases (e.g. Stanford).
- Local control over programming allows paging for libraries in temporary locations with off-campus holdings.
- Custom programming is in place to support BAKER, ILL, Page NRLF, etc.
- Socket calls to Tandem (GLADIS) for circulation and authentication information. Right now Melvyl calls Pathfinder, and Pathfinder calls the Tandem for circulation information. The new Melvyl, if Pathfinder is discontinued, will need to be able to make the socket call directly to the Tandem.