

APPENDIX B

Pathfinder Intrinsic Features - Ranked List

December 2, 2003

Intrinsic Pathfinder Features that would be lost, or require Melvyl modification to replace:

Item	Rank	Problem	Explanation / Examples	Possible Solutions	CDL Comments 11/3
1	1	Limit by library	Numerous units report significant use, and Melvyl currently limits only by campus. Used at Doe/Moffitt reference desks to pinpoint material in reference collections, and elsewhere. Environmental Design also uses, usually with keyword searching. Patrons use heavily. Bancroft uses heavily. One implication is that we can not easily eliminate all of the microfilm copies or facsimiles of early printed books and focus solely on special collections holdings, more likely to be originals.	Add feature to Melvyl?	Yes, UCB sub-locations could be added. Involves (among other things) reindexing of database and changes to user interface. A "political" decision rather than a technical one.
2	1	351 notes	351 Arrangement Notes do not display in Melvyl. (Significant for archival collections, both manuscripts and visual materials) Example: <i>Roy Flamm collection of California architectural photographs</i> .	Add display to Melvyl	Possible; it appears it could be added to the Full display (edit_doc_999.eng and edit_field.eng)-exclude subfields \$6 and \$8(linking subfields). It appears CDL can control subfield display order: if so, UCB would need to decide order.
3	1/2	Truncation	Truncation works well in Pathfinder, parallels journal article database practice, and is a cornerstone of search technique instruction for some units. Database size limits the usefulness of truncation in Melvyl.	Change strategy, use keyword search where appropriate.	Functioning of truncation in Melvyl will not be changed in current software architecture.
4	2	Inclusion of "on order" records, n-level and p-level records.	Many units rely on keyword searching in Pathfinder to find on-order items. Keyword search ability makes locating brief o, n, and p records far easier than in Gladis, especially for unique archival materials with supplied titles rather than known formal titles. Patrons can also see that something has been ordered. NRLF staff use Pathfinder to limit n-level searches by library.	Add order records to Melvyl? Rely entirely on GLADIS for these records? Make keyword searching possible in GLADIS?	CollectionDevelopmentCouncil (systemwide cte) contends that inclusion of <i>on order</i> records is inadvisable because it causes confusion.(reaffirmed Sept 2002); current CDL Record Standard specifically states that "on order" records should not be sent; nonetheless some campuses may currently

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					send in on-order records. Policy issue. (Keyword searching in telnet Gladis is not an option.)
5	2	Chronological Imprint file (“ci”) & Geographical Access file (“ng”)	Chronological Imprint searching and Geographical Access searching in Pathfinder is based on the 752 field. It is VERY important for locating material by place and date of publication and is used by Bancroft as well as Newspaper catalogers. Keyword searching of the 260 (as in Melvyl) is not adequate for this due to all the language and spelling variations that might occur.	Potential substitute feature, partially replacing both CI and NG: Index 752s in Melvyl as a “Place of Publication search”, at the risk of misleading results since not all libraries use the 752. Consider a “Place of Pub” search that searches BOTH the uncontrolled 260 and the 752, which has controlled forms of place names.	Possible. Currently Melvyl uses the 008 (15/17), the 260\$a, the 261\$f and the 262\$a\$b for Place of Publication. Could add 752. Rebecca Doherty notes this would need input from hard core catalogers, since the 752 is used in various ways and could be misleading. (e.g. place a newspaper serves rather than place where it is published)
6	2/3	“Special Files” based on relator codes	Bancroft’s Association File (7xx + \$4asn), Binder File (7xx + \$4bnd), and Typographical File (7xx + \$4bcp) are not indexed in Melvyl. Association is the largest, and is used to index important names associated with a particular copy of an item, not a creator or subject. This is especially problematic in that it results in false “author” hits for individuals whose libraries we have acquired. See: Irving Stone or Philip Whalen, for example. (See Whalen’s copy of Elbert Hubbard’s “Little Journeys” – Whalen asn entry is stripped out in Melvyl display, but is still retrieved.) Pathfinder allows you to target all of the “asn” entires separately, but it fails to target the “real” authors accurately also – so it’s a problem in both.	A Melvyl “Browse” feature that further breaks down headings (to the \$4) would help.	Rebecca Doherty notes that conceivably three new indexes could be built. eg. Association file: build index from specified 7XX fields and subfields that contained subfield \$4 with value ‘asn’. Question: what impact on non-UCB records non-rare book users?
7	2/3	\$3 subfields	Display clarity is worse in Melvyl than Pathfinder due to the absence of these “Material Specified” portions of notes. This subfield (\$3) used is used by Bancroft in	Change Melvyl to display \$3 at the beginning of fields in	CDL may be able to alter the subfield order of display (edit_field.eng) however would need to test this.

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			fields 260, 300, 351, 5XX (500, 506, 520, 530). It might be valid in other fields as well, but these are those Bancroft uses. Example (title): <i>The San Francisco News-Call Bulletin newspaper photograph archive</i> (Additional note: Pathfinder does not display the \$b of 351 fields, and it should!)	which it occurs (preceding \$a).	
8	3	“Date added” searching	Date added can not be searched in Melvyl. Useful in Pathfinder for locating recent acquisitions: Acquisitions, Tech Services staff, and subject selectors are likely users.	Add feature to Melvyl?	Melvyl default display is last in – first out. This feature is not present in Aleph software nor contemplated in the next version.
9	3	Limiting/Sorting	Pathfinder permits setting persistent limits and persistent sort for a session, sorting by more than one criterion at a time, more fields to sort by.		None of these features are on current Melvyl development list.
10	3	Modify feature	Pathfinder modify allows full range of boolean operators plus ability to add limits after a search has been performed. Melvyl does not.	Changes underway at CDL to improve modify?	This is on Melvyl development list for next version.
11	3/4	Genre/form searches Banc	These terms are lumped into subject searches in Melvyl, not a separate search option. (Books about "lithographs" will be retrieved along with examples of "lithographs". Limiting searches to certain material types (audiovisuals or books) seems to mitigate this problem, to some extent.)	Add feature to Melvyl? Genre is a sep index in Pathfinder.	Possible to create a Genre index per specs.
12	4	Clarity of URL links for finding aids. Display of links to online resources in general	In Melvyl, links to a finding aid or digital images appear only at the bottom of the Melvyl display, in the "holdings" information, and it's a bit cryptic: the link says "Available Online" in blue, then a notes field to the right says "Finding Aid", presumably from our 852\$3 Melvyl display of links to online resources are harder to get to, less clear.	Discuss Melvyl display options.	Text to right of “available online” link is drawn from the 852\$3. Records could have additional info in that subfield. The general Melvyl display, however, is hardcoded and cannot be changed without development.

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13	4	Display issues	Pathfinder has fully customizable display options from Brief and Saved displays. Call numbers and online links on first result screen.		Fully customizable display options are not on Melvyl development list. Because of union catalog architecture, holdings info cannot display on first screen.
14	4	Full Boolean searching at all levels	Pathfinder allows and, or, not in limiting as well as in full feature search and modify. Melvyl allows “and” searching, but full Boolean searching is available in command search only.	Use Melvyl command search, which has full Boolean searching	Current search page format does not accommodate more than ‘and’ as an operator between boxes; would be major work to redo the interface. (Teach users to use booleans within search boxes)
15	4	Browse	In Pathfinder, nearly all fields browseable. Limited number of fields in Melvyl.		It’s theoretically possible to set up any direct index (e.g. call number) or heading for browsing, although CDL would need to test what the display would look like.