DALNET Planning Process Committee
Report to the DALNET Board
September 14, 1995

The DALNET Planning Process Committee includes Louise Bugg/DALNET
Office, Indra David/Oakland University, Mary Ann
Sheble/University of Detroit Mercy, and Frank White/Macomb
Community College. The Committee was asked by the DALNET Board
to draft a planning process for the next generation DALNET Online
System. This is the Committee's first report to the Board.

Assumptions made by the Committee:

(1)   The DALNET Online System, based on NOTIS Library Management
      System (LMS) mainframe software, is becoming out-dated
      and will not be able to meet our needs for a new generation
      system without substantial redesign.

(2)   The next generation library information retrieval and
      delivery system will likely be a client/server based
      design. It will operate with TCP/IP communications and rely
      on high-end microcomputers for multi-function workstations.
      It will be able to retrieve all formats of library
      materials, whether stored on local or Internet host
      computers, and to deliver information not only to
      libraries but also to users' desktops in their homes and
      offices. .

(3)   Given the stage of client/server library system development,
      there are no systems currently able to handle a library as
      large as Wayne State's let alone a consortium the size of
      DALNET. It could take a few years for these systems to
      develop the features and capacity we need. This gives us
      time to plan while these systems develop.

(4)   It is highly desirable for a consortium like DALNET to
      select a proven library system rather than one on the
      cutting edge, unless we have the opportunity to work with
      a vendor to develop the kind of system we need.

(5)   Wayne State's Computing Center will not pressure DALNET to
      migrate off the mainframe, thus giving us time to plan
      for the next generation system.

(6)   Client/server technology will soon offer smaller DALNET
      member libraries the capability to run their own separate
      systems. Those systems could be linked together rather than
      be part of a shared system. It would take individual DALNET
      libraries some time to move to such stand-alone systems,
      however, DALNET needs to begin now to determine its vision
      for the next generation.

Recommended Steps in the Planning Process:

(1) <u>Conduct a DALNET Service Evaluation</u>

DALNET needs to update its understanding of its customers'
needs in order to bolster service during the next few years,
while we plan for migration to the next generation
system. The DALNET Online System needs to be focused on
those enhancements that are the most critical to member
libraries in the interim. Preliminary work also needs to be
done on a new vision for DALNET as a foundation for planning
for the next generation system.

NOTE: focus sessions were held with key staff of DALNET
member libraries during the summer. A separate report
summarizes the findings of those sessions for the Board.

(2) <u>Develop a New Shared Vision</u>

The Committee recommends that the DALNET Board (and other
key individuals such as project managers) participate in a
visioning session this fall. Even though the focus sessions
this summer started us thinking about new directions, they
were done in small groups. Now, we need to put all our
heads together to come up with our collective, shared ideas.

The goal is to have at least a preliminary version of our
new vision to use and refine as we educate ourselves about
the latest capabilities of technology. Knowing what we
want to accomplish will help us ask the right questions of
the vendors, will help us test our assumptions and ideas.

For this process, we may find it helpful to hire a
consultant to be an impartial facilitator and to free all
those involved to participate in the visioning. We may also
want to include a step in the process that acknowledges the
individual DALNET libraries' visions before we develop a
group vision. The Committee is willing to develop a plan
and budget for this session.

(3) <u>Educate Ourselves About New Information Systems</u>

To plan for a new system, DALNET project managers and other
key staff need to learn about current and developing library
information systems. The goal of this education process
includes understanding the "total information environment"
that goes beyond automating library operations and providing
centrally mounted citation databases. That environment

includes both locally and remotely accessible Internet information resources that are linked together. It includes the integration of shared systems with locally provided systems to present them to users with common interfaces and easily understood search engines on single workstations.

The Committee recommends a one-year education process aimed primarily at DALNET project managers. The Committee would organize the education sessions, e.g., schedule one every other month. The topics to be included are:

a. Future directions of telecommunications, mainframe, and client/server technologies. Example: Ameritech, IBM.

b. Client/server library systems. Example: Sirsi, Horizon.

c. Internet resources and services, both private and commercial. Example: CARL Uncover, IAC, UMI.

d. CD-ROM and other local LAN-based information systems. Example: Silverplatter, Ovid, Logicraft/Virtual.

e. Intelligent front ends that organize access to and retrieval from local and remote information systems. Example: WebPac (Ameritech), WebZ (OCLC).

f. Digital libraries and electronic publishing systems and services. Example: NetPublisher (Ameritech), electronic course reserve systems.

The Committee proposes minimizing costs for this process by seeking vendor-supported presentations, however, some travel expenses may be incurred to bring in experts from other libraries. Some of the vendors may be able to address several of these areas in a single session. The series of sessions should end with an update session that reviews developments since the beginning of the year. Support from the DALNET travel budget is requested for this educational effort, estimated $1,000-2,000.

(4) Determine "Bridge" Products and Services

While we are planning for the new system, we need to enable our current NOTIS LMS mainframe system to best meet our needs over the next few years. Ameritech has several "bridge" products to offer that continue the move to a UNIX environment, e.g., DocDirect, InfoShare, and WebPac client software. There are also capabilities now available that we haven't implemented due to resource constraints, e.g., location-based catalogs. New software releases will

also continue to be delivered for the mainframe LMS system,
e.g., circulation redesign.

The report on the focus sessions held this summer includes a
listing of the "bridge" products and services that are
important to DALNET libraries in the next few years. Number
one on the list is location-based catalogs. The DALNET
staff should analyze what it would take to implement this
capability and make a proposal to the Board for action.

(5) Identify Functional and System Requirements

DALNET library staff need to identify their needs for
functionality beyond the current NOTIS LMS features. The
new system should be focused more on the user's needs--be
more customer driven--than focus on the staff's operational
needs, which are a given. Not only should the needs of a
multi-type consortium be itemized, but so should those
unique needs of the various DALNET member libraries.

In addition, the staffing configurations needed to support a
client/server environment need to be estimated, including
staff for the local sites as well as for the central site.

The Committee is willing to continue working on a process
for this step.

(6) Refine our New Shared Vision

The Committee recommends that the same consultant hired for
our earlier visioning session now be invited back to help us
incorporate all that we have learned into a refined version
of our vision. The goal now is a vision to help us evaluate
and select a vendor for our next generation system.

(7) Plan for System Migration

As DALNET gets ready for its new system, it needs to
consider the remote possibility that Ameritech would stop
supporting the mainframe NOTIS LMS before we are ready or
able to migrate. We need to determine what resources we
would need to continue with the mainframe LMS system even if
it were unsupported. The Committee recommends that the
DALNET staff do an analysis and report back to the Board
this year.

Individual DALNET libraries need to assure themselves that
they are making the best investments in local
telecommunications systems and microcomputer workstations to
take the advantage of future client/server systems.

DALNET also needs to think through the possible system migration plans to help evaluate next generation systems. Those better able to support our migration needs will look more attractive.

And, finally, the DALNET Board needs to develop a plan to finance the migration so that appropriate steps can be taken to raise any needed capital contributions for both the local and central site costs.

The Committee is willing to continue working on a process for this step.

Overall TimeTable for The Planning Process:

The Committee still needs to develop an overall timetable for the planning process. These first seven steps we have identified could easily take the first year. The goal is to prepare ourselves for system procurement and migration, which are estimated to take two years.

Submitted by,

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