

**DALNET/AMERITECH PARTNERSHIP
PROGRESS REPORT
JULY 27, 1999**

DALNET and Ameritech agreed to work together to jointly develop and implement a library information system as the central component of an information hub for Detroit and Southeast Michigan. As part of our Partnership Proposal, we identified seven strategic areas in which to put our efforts to achieve our shared vision of a model urban information hub. This report addresses our progress to date in these areas since our agreement was signed in August 1998.

I. Information Hub Strategies

- A. Implement Horizon, enhanced in the agreed upon areas, as the foundation for the Information Hub.

A report on the *seven enhancements* we agreed on, as well as on Horizon and WebPAC release requirements for DALNET, is attached. The first three enhancements were to be delivered in March 1999. Delivery dates for the shared authority file and the children's OPAC are still open issues from our contract.

A report on the *migration of DALNET libraries* from NOTIS to Horizon is also attached. DALNET has migrated three libraries to date and has fourteen more to migrate before January 2000, when our NOTIS system is scheduled to be discontinued. The four non-NOTIS libraries can migrate after that. Major issues relating to data migration and functionality are included.

System performance in our large, shared environment is becoming a major concern. Ameritech is helping us analyze use of the Horizon database server housed at Wayne State University. We are seeing usage in the 65 to 70% range with five processes running. Wayne State University library staff are reporting serious concerns about response time for WebPAC searching. Searches often take so long that users cancel them before getting results. Many people continue to use LUIS (our NOTIS OPAC) as the fallback. We are concerned about performance in the fall, given that these summer months are our lightest use.

Compounding these performance concerns is the fact that the Detroit Public Library is having difficulty implementing the Agreement to provide *Help Desk, Webmaster, and server site services* to DALNET. Delays at DPL are impacting DALNET staff at WSU as well as Ameritech staff who are helping us with contingency planning. We may need to load more

libraries than planned on the server housed at Wayne State University.

As DALNET implements more and more Horizon databases, it is becoming clearer that our *Horizon test server* was under-configured. In the current test environment, we are using backup copies of the DALNET production Horizon databases as our test databases. This seems to be the most efficient way to manage the test databases and provides the best test environment for troubleshooting and training. Unfortunately, the test server was not sized to accommodate this.

Implementation services from Ameritech during DALNET's migration to Horizon have been generally quite good. Several Ameritech experts provide information that is clear, accurate and timely. Others seem to be overloaded and have no backup experts to fill in, as needed. Documentation could be improved if it were more timely and gave more details about the impact of choices made during implementation.

As the DALNET site gets ready to move from implementation to ongoing *support services*, we would like to explore a new model with Ameritech—one that enables DALNET to be more self-sufficient and better able to handle front line support locally, rather than having to depend on Ameritech experts for day-to-day support. We are in a good position to provide more support locally with our history of managing a NOTIS site with local computer professionals and systems librarians. This new support concept fits with our mutual goal of working together to develop a model for other consortia (and large sites), with our "train the trainers" approach for providing training, and with our joint development projects.

- B. Include DALNET's participation in writing specifications, evaluating, and testing prototypes for the Horizon system enhancements.

DALNET staff and library representatives have been actively involved in several of the enhancement projects. Workarounds are needed to enable testing prototypes remotely, as it is not easy to use a local DALNET Horizon database for beta testing.

- C. Integrate Horizon with DALNET libraries' desktop computers and network-based information resources, systems, and services.

Each DALNET library is installing the needed desktop computers and creating the appropriate links in their Horizon databases to network-based electronic resources. One difficulty has been identifying in a timely way

what the recommended specifications of the workstations are to optimize performance for library staff and users. Advance notice of new requirements are very much appreciated, as it takes a lot of lead time for DALNET libraries to upgrade and replace equipment.

II. Interface Design Strategies

- A. Design a children's catalog interface...

This is one of the enhancements reported on.

- B. Design Web-based client software to shared systems for DALNET libraries' users...

The DALNET WebPAC Design Task Force developed prototypes for the interface to the shared catalog last summer. Unfortunately, there is no date yet for delivery of the shared catalog, which is part of the Sunrise project. In the interim, DALNET will be designing a WebPAC 1.3 interface for broadcast searching across member libraries' OPACs.

- C. Integrate DALNET libraries' Web home pages and systems with NOTIS LMS and Horizon.

This awaits hiring the DALNET WebMaster, to be headquartered at the Detroit Public Library. Integration with NOTIS LMS is no longer needed.

III. Network Infrastructure Strategies

- A. Design a private TCP/IP network for participating DALNET libraries to ensure acceptable network performance and reliability.

Ameritech Advanced Data Services (AADS) has done the initial design work for a private frame relay network for DALNET and a briefing was held for DALNET institutional representatives to review the options. As a result, the University of Detroit Mercy is operational on the frame relay and it is being installed at the Detroit Public Library. It is turning out that each DALNET institution needs individual attention to determine its best frame relay connectivity option.

- B. Provide help to DALNET libraries for needs assessment, selection and installation of desktop workstations for both staff and users.

Advance notice is needed to give DALNET libraries sufficient lead time to be prepared not only for the initial Horizon installation but also for new releases. More realistic guidelines for workstations would reduce the need to upgrade as often with new releases. Hardware options for printing spine labels and carbonized mailers have been difficult to obtain and somewhat limited.

- C. Develop a shared Help Desk service to provide trouble-shooting within the private TCP/IP network for participating DALNET libraries.

Staff are just getting hired for DALNET's Help Desk. In the meantime, the University of Detroit Mercy and DPL have handled their own frame relay network troubleshooting, with help from Wayne State University/DALNET staff. Work in this area needs to intensify in the next six months.

IV. System Migration Strategies

- A. Install bridge products in the NOTIS environment to serve during the transition and to relieve demands for NOTIS support.

The only bridge product DALNET has put in place has been a WebPAC interface into LUIS, our online catalog for the NOTIS system. Links from LUIS to Horizon are not being done.

- B. Implement WebPAC to provide user access to LUIS with standard Web browser software...

Unfortunately, performance of WebPAC into LUIS is so poor as to be practically unusable in the interim. DALNET's resources must be focused on the migration off NOTIS, however, so we cannot put staff time into diagnosing and resolving this problem. Users and public services staff are frustrated with this situation and continue to use terminal-based access to LUIS, as they are able.

- C. Implement InfoShare to replace MDAS as DALNET's citation database system.

This strategy proved not to be cost-effective and DALNET libraries now obtain most of their electronic databases from vendors via the Internet. All DALNET citation databases locally mounted on the NOTIS MDAS system have been removed except one, which is being removed soon.

- D. Shift resources from centralized mainframe systems support by:
1. Migrating to the latest IBM operating system OS/390.
This migration was completed in June, 1999.
 2. Freezing NOTIS enhancements beyond Release 6.4.
This has been done and only Year 2000 fixes are being installed, as needed.
 3. Contracting for NOTIS day-to-day technical support.
This proved unnecessary, however, current DALNET staff are still providing considerable support to the NOTIS system. For a variety of reasons, DALNET libraries are not ready to remove their records from NOTIS. Also, many ad-hoc reports are needed from NOTIS to help with data migration tasks.

V. Resource Sharing Strategies

- A. Implement RSS... to provide users with the ability to request both traditional and full-text documents and to provide a platform for testing in a multiple-library environment with both OCLC and DOCLINE ILL systems.

DALNET is waiting for recommendations from Ameritech for the RSS servers needed. The original recommendation for four servers is being changed in consideration of the latest RSS release requirements. This implementation was scheduled to begin in May with the first four DALNET libraries using Horizon.

- B. Identify local information resources that... could be digitized and undertake projects to make them available through DALNET's information hub.

DALNET is still interested in software that integrates digitized images into Horizon and WebPAC for access by our users. With Ameritech's discontinuance of the NetPublisher software, we are still finalizing a letter of agreement for a replacement image system. Two demonstration image databases were developed by Ameritech with University of Detroit Mercy

staff for showcasing at the ACRL national conference in Detroit in April 1999.

- C. Continue to seek opportunities for DALNET libraries to share the costs of electronic library information resources... and make them accessible through the DALNET information hub.

The DALNET Collection Development Committee continues to explore opportunities and make recommendations for shared licenses. A new DALNET Web Site Standing Committee has been created to make recommendations to take advantage of WebPAC 1.3 broadcast searching capabilities to access electronic databases.

- D. Identify special collections and others materials in DALNET institutions that should be made accessible and undertake projects to add them to the Information Hub.

Individual DALNET libraries are responsible for this task. Wayne State University has applied for grant funding for two related projects—one for diabetes information and one for a GIS-based project.

VI. Cost Sharing Strategies

- A. Develop an equitable cost-sharing plan among the DALNET member libraries...

This has been completed.

- B. Identify funding sources or donated services to help carry out these initiatives.

The Grants Committee submitted a proposal to the Library of Michigan for LSTA funds for an image project for DALNET.

- C. Develop new or improved cooperative services...

The Help Desk service concept has been approved in the DPL Service Agreement for DALNET and will be implemented in the months ahead. Unfortunately, delays at DPL have impacted delivery of their services to DALNET.

- D. Negotiate group-purchasing discounts...

Ameritech has provided information about their Web store purchasing.

VII. Promotion Strategies

- A. Issue joint press releases with Ameritech to publicize milestones reached during the partnership.

An initial press release was issued and a formal contract signing was held to announce the partnership.

- B. Target the spring 1999 ACRL conference in Detroit as an opportunity to showcase the DALNET information hub.

DALNET's Horizon and WebPAC implementations for the University of Detroit Mercy, Botsford Hospital, and Wayne State University were showcased at the ACRL conference, along with a prototype WebPAC interface for the Detroit Public Library. The two University of Detroit demonstration image databases were also showcased and well received by conference attendees.

- C. Other promotion strategies

In addition to those listed in the Partnership Proposal, DALNET has received grant funding through the Detroit Public Library from Ameritech Michigan for \$100,000 to promote public awareness and to provide user training for the Information Hub, named Im@gine. A video about the Im@gine system is on target for completion in August/September, 1999. Meetings with community information providers who could add their information to the Hub are being scheduled this fall.

Ameritech also provided assistance in designing a new logo for DALNET.

DALNET's new outreach coordinator has initiated marketing meetings with prospective DALNET member libraries in the seven county area and discussions are now underway with several of them. Ameritech's cooperation and help in these efforts has been much appreciated.

**Submitted by,
Louise Bugg, Wayne State University
Director, DALNET Online System**

Enhancements

Report for DALNET Board of Directors Meeting

July 27, 1999

1. Horizon Releases

DALNET plans to convert all of its production sites to version 5.1.2 by fall 1999. WSU and UDMercy are on Release 5.0 and Botsford is on 5.1.1. The remaining libraries will be implemented at Release 5.1.2. As soon as two large libraries are at Release 5.1, Horizon software acceptance testing can begin.

The much-needed functionality and productivity enhancements in Sunrise seem to be a year or more away from Production.

In terms of enhanced Horizon functionality, DALNET looks first to our partnership with Ameritech as the way to develop a library information system that meets the needs of a multi-type consortium.

2. WebPAC 1.3

DALNET had developed a timeline for the implementation of WebPAC 1.3 during this summer that would have given us the long-awaited broadcast searching capabilities and enabled acceptance testing of Horizon to be done. Unfortunately, delays in the release of the Solaris version mean that we will still not have this required functionality, originally scheduled for August 1998 delivery, until late 1999 or early 2000.

This is a serious setback in DALNET's project plan. Broadcast searching is DALNET's interim solution to the loss of a union online catalog of our member libraries' holdings. It is also a key feature of the Information Hub being promoted that enables users to search OPAC, citation, and image databases simultaneously.

3. Shared Patron File

The majority of the issues surrounding the shared patron file have been discussed and both DALNET and Ameritech appear to be in agreement. We are reviewing a recently received proposal for discussion on some database mapping issues related to the patron record. We need a "final" proposal from Ameritech outlining the entire shared patron file agreement with a new timeline for testing and delivery of the enhancement, which was originally scheduled for March 1999.

The details of the matching algorithm to create a unique ID that will substitute for Social Security Numbers in DALNET's patron records have been agreed upon. The workaround, in the meantime, is for DALNET libraries to store the last four digits of the SSN as well as the month and date of birth in each patron's record for use in creating the new unique ID number when the patron files are converted.

The issue of the two, shared files/databases (Authorities and Patrons) creates another challenge for installing new releases. While we do not have a definitive response from Ameritech, we expect that, at least initially, all member sites will have to be at the same release in order for these shared files to work correctly. This presents an enormous challenge to DALNET; converting all twenty plus members to a new release in a very short time period. Until we convert, we will be unable to use our much-needed shared file functionality. One strategy for future releases of the shared file functionality may be to design them so that they are always functional with the immediate previous release (e.g., 6.0 and 6.1), regardless of "sub-release" (e.g., 6.0.1), without incompatibility.

4. Authentication System

DALNET's initial review of the specifications for the Remote Patron Authentication (RPA) prototype is satisfactory, however, our review is not yet complete. This product needs to integrate seamlessly with all DALNET's Horizon and WebPAC user services that need authentication. It will also need to integrate with the Shared Patron File. This enhancement was scheduled for delivery in March 1999 with the Shared Patron Database.

5. Shared Authority File

DALNET's discussion with Earl Boyce has been very productive. Both parties are in agreement with the design and development of this functionality. DALNET needs this functionality ASAP due to the loss of some significant functionality since the migration from NOTIS to Horizon.

The delay of this functionality until Sunrise has a significant impact on DALNET. NOTIS made use of a shared authority file and the maintenance of the authority file was centralized in DALNET. In the current release of Horizon, we will have fourteen authority files to maintain. This is cost-prohibitive to DALNET. It means that we will have to defer maintenance on most of our authority databases until Sunrise is implemented and design the implementation of our Shared authority file to incorporate fully automated database clean-up processes. DALNET looks forward to continued work with Ameritech and an implementation as soon as possible. A delivery date for this enhancement still needs to be agreed upon.

6. Children's OPAC

DALNET is running behind on this enhancement. We have reviewed an initial proposal by Ameritech that seems to cover the basic outlines of what is required. DALNET needs to develop some more detailed specifications and examples for Ameritech. The committee co-chairs for the DALNET Children's OPAC Task Force are scheduling a meeting for the week of July 12 and expect to provide some written information in the

next few weeks. We still need a delivery date for this enhancement once the requirements have been determined and agreed upon.

7. Ad-hoc Management and Statistical Reports

Report Smith is running adequately on the separate Horizon databases. It is not usable for creating much-needed statistics on WebPAC usage, however. We do not know yet how it will work with shared files. Unfortunately, it is not easy for a novice or inexperienced staff member to use Report Smith. Ameritech's new product, English Wizard, looks very promising. We look forward to receiving more information on this new product soon.

8. Integrated Booking Module

DALNET is working on local needs for this module. Information from Ameritech indicates that we must be at Release 5.2 to beta test the first version of the booking module on DALNET databases. DALNET is in the process of converting to 5.1.2. While, we remain interested in testing this product locally, installing release 5.2 may not be feasible in the near term. DALNET's first concern is to provide specifications to Ameritech for the features needed in the booking module. We are also available to test the module by accessing the prototype on one of Ameritech's servers.

9. ILL/Document Delivery System (RSS)

DALNET is in the process of acquiring RSS hardware and software. We look forward to integrating this product into our services. Unfortunately, it appears that there are still two significant limitations, i.e., OCLC's and DOCLINE's non-compliance with the ILL ISO standards. The RSS interface with OCLC is able to transmit requests to OCLC, as we understand it, after which the ILL staff must continue their work on OCLC. Until these two providers are in full compliance, staff will still have to switch between RSS and service providers' systems on a continuing basis. DALNET is willing to help Ameritech communicate with these two providers about the importance for them to become compliant as quickly as possible.

Submitted by,
Scott Muir
DALNET Project Leader

DALNET HORIZON MIGRATION STATUS

Site	Release	Status	NOTIS Conversion Progress	WebPAC
UDM	5.0.2	Production, converting to 5.1.2	Converted	1.2 Production
Bolsford	5.1.1	Production, converting to 5.1.2	Converted	1.2 Production
WSU	5.0.2	Production, converting to 5.1.2	Converted	1.2 Production
DPL	5.1.2	Implement Summer of 1999?	Production Data Loading	1.3 Beta Software
DIA	5.1.2	Implement August 1999	Review Test Data	1.2 Developing
OCLL	5.1.2	Implement August 1999	Review Test Data	1.2 Developing
VA	5.1.2	Implement August 1999	Test Data Loading	1.2 Developing
Walsh	5.1.2	Implement August 1999	Test Data Loading	1.2 Developing
Beaumont(2)	5.1.2	Implement October 1999	Test Data Loading	1.2 Developing
DMC (5)	5.1.2	Implement October 1999	Tables Data Entry	Need Training
MCC	5.1.2	Implement October 1999	Tables Data Entry	Need Training
OCC	5.1.2	Implement October 1999	Tables Data Entry	Need Training
WCCC	5.1.2	Implement October 1999	Waiting for first Test Data Load	1.2 Developing
DMC (2)	5.1.2	Implement December 1999	Tables Data Entry	1.2 Developing
DPSPL	5.1.2	Implement December 1999	Custom Plans to be Developed	Need Training
Mt. Clemens	5.1.2	Implement December 1999	Custom Plans to be Developed	Need Training

VISION AND IMPLEMENTATION STRATEGIES

Vision

The Detroit Area Library Network (DALNET) and Ameritech Library Services propose to create, through their partnership and shared effort, a model urban information hub in the Detroit area. The hub will be a single source of information and library-based services providing access to the shared resources of the partners and DALNET member institutions. It will serve as a gateway to information resources worldwide that supports the life-long learning needs of the people of the Detroit metropolitan area. It will improve access to unique local information, special collections, and services available through DALNET member institutions. Finally, it will enable DALNET libraries to play a leadership role within their institutions and communities in the delivery of information to meet the library-based learning, research, professional, cultural, and recreational needs of their users.

In order to actualize this shared vision of an information hub, featuring DALNET services and Ameritech systems, DALNET and Ameritech commit to the following:

- Development of a computerized system to serve as the foundation for the information hub of a large multi-type library consortium that includes academic, public and special libraries, and that can be expanded to include school libraries.
- Design of an easy-to-use interface to DALNET's information hub that has a consistent "look-and-feel" yet can be customized for specific user groups as they access DALNET libraries' information resources and systems throughout their lives.
- Development of a network infrastructure, including critical help desk services, that ensures system availability and responsiveness to DALNET's staff and users in DALNET libraries, as well as in their offices, classrooms, and homes.
- Migration from the "legacy" NOTIS system to the new system in a manner that minimizes disruption to DALNET's users, takes advantage of the power of desktop computers, and maximizes operational efficiencies for DALNET libraries' staff.
- Improved access to, and sharing of, DALNET libraries' traditional collections, electronic materials, special collections, and local digitized information resources through the hub.
- Provision of a cost-effective system for a large consortium through shared expertise, cooperative services, and shared information systems and resources.
- Enhanced visibility of DALNET, particularly its member libraries' resources and services, as a means to identify new partnerships and funding sources that will help build the information hub.

Implementation Strategies

The implementation strategies to achieve these goals are as follows:

Information Hub Strategies

- Implement the Horizon system, enhanced in the areas mutually agreed on, as the foundation for DALNET's information hub.
- Include DALNET's participation in writing specifications, evaluating, and testing prototypes for the Horizon system enhancements.
- Integrate the Horizon system with DALNET libraries' desktop computers and network-based information resources, systems, and services.

Interface Design Strategies

- Design a children's catalog interface to include such features as automatic spell checking, ranked retrieval sets, concept searching and librarian-designed canned searches.
- Design Web-based (thin) client software to shared systems for DALNET libraries' users that improve patron access and ease of use while reducing client software maintenance costs.
- Integrate DALNET libraries' institutional Web home pages and Web-accessible systems with the NOTIS LMS and Horizon systems implementation.

Network Infrastructure Strategies

- Design a private TCP/IP network for participating DALNET libraries to ensure acceptable network performance and reliability.
- Provide help to DALNET libraries for needs assessment, selection, and installation of desktop workstations for both staff and users.
- Develop a shared Help Desk service to provide trouble-shooting within the private TCP/IP network for participating DALNET libraries.

System Migration Strategies

- Install bridge products in the current mainframe-based NOTIS environment that will also be fully functional in the Horizon environment, to serve both the NOTIS and new systems during the transition and to relieve demands for ongoing NOTIS support.
- Implement WebPAC to provide user access to LUIS with standard Web browser software, which will give a new look to LUIS during the transition, take advantage of desktop computers in DALNET libraries, and provide a platform for developing the children's catalog interface.
- Implement InfoShare, a UNIX-based database server system, to replace MDAS as DALNET's citation database system.
- Shift resources from centralized mainframe systems support towards the new client/server systems, TCP/IP networks, and PC and network support services by:
 - Migrating to the latest IBM operating system OS/390.

- Freezing NOTIS enhancements beyond Release 6.4.
- Contracting for NOTIS day-to-day technical support after Release 6.4 is installed until late 1999.

Resource Sharing Strategies

- Implement RSAS, the interlibrary loan and document delivery management system, after WebPAC is operational, to provide users with the ability to request both traditional and full-text documents and to provide a platform for testing in a multiple-library environment with both OCLC and DOCLINE ILL systems.
- Identify local information resources that already are or could be digitized and undertake projects to make them available through DALNET's information hub.
- Continue to seek opportunities for DALNET libraries to share the costs of electronic library information resources available from both commercial and non-commercial providers and make them accessible through the DALNET information hub.
- Identify special collections and other materials in DALNET institutions that should be made accessible and undertake projects to add them to the information hub.

Cost Sharing Strategies

- Develop an equitable cost-sharing plan among the DALNET member libraries for the new system, with baseline components supported by all members and optional components to be selected by individual members.
- Identify funding sources or donated services to help carry out these initiatives.
- Develop new or improved cooperative services, such as the Help Desk service for desktop computers and the DALNET network, DALNET database maintenance, and shared cataloging.
- Negotiate group-purchasing discounts for software, desktop workstations, electronic resources, and other supplies or equipment.

Promotion Strategies

- Issue joint press releases with Ameritech to publicize milestones reached during the partnership.
- Target the spring 1999 ACRL conference in Detroit as an opportunity to showcase the DALNET information hub.