

Ex Libris Customer (1978-2005) Questionnaire – Katherine Ward

1... What is your name and the name of the institution(s) where you worked with Aleph (and/or other Ex Libris products)?

Katherine Ward

- implementation team University of Notre Dame, 1998-1999
- Saint Mary's College, Notre Dame Indiana, 1998 –
- Aleph, the MALC maid, the representative for the smaller libraries in the Michiana Academic Library Consortium (i.e. MALC)
- Currently, the Czarina of SFX.

2...When did your site install Ex Libris software and when did you start working with it?

It was December /January 1998/1999. It was cold. There was a blizzard. We did it anyway.

3...What was your job title, or, more generally, what did you do? Were there particular projects you were involved in?

Pesky kid sister.

I tried to represent the interests of the smaller academic libraries in the consortium with the University of Notre Dame. You have no idea how the transition from a terminal based system (mainframe) to client/server technology struck terror in the hearts of librarians and library staff members who had to work with the inevitable change. We developed “flash cards” to guide users through some of their normal workflow.

With the Library Task Force I helped to evaluate various vendors and was part of the infamous “Road Trip Across America” and also the “European Adventure” in Denmark and Belgium.

I was “on loan” for six months from Saint Mary's College to the University of Notre Dame for the implementation.

Tables, tables, tables.... For my sins, I set them up: circulation tables, patron records, loan tables, cataloging tables (those 400 fields gave me nightmares), and some serial prediction patterns. It was a game of *Dragon Quest*: change one thing here and go back three levels and change something in seemingly unrelated modules to find the golden treasure.

I learned vi and not to use tabs. I learned to grep and not gripe about it (well, not too much). I learned about coax cables. And I learned how to interpret geek-speak. I would not have survived without Doug McKeon, Phil Andrewjewski, the late Bob Konicek, and Tom Hanstra. And coffee. Lots and lots of coffee.

4...Were there modules which you felt were particularly good, distinguishing Aleph from other vendors' versions of the same module?

We were there in the first meeting with ExLibris with Judy Levi and Rob Baum. The various modules were emerging and not as “mature” as some other systems. Honestly, Serials had to be built from the ground up and the Serials people were not very happy – but were very brave (Laura Sill and Pam) and took the risk anyway.

One of the things that struck Sue Dietl and myself about circulation was there was no way to **recall a book** from a patron (a typical US library function).

Judy listened to us but kept asking us “why?” “Why did we need to recall a book? Certainly responsible academics would return materials on time.” [Insert hysterical laughter here]

Once Judy understood the academics in the US check out and keep *thousands* of books and don't like to return them unless threatened with maiming, she said "Ah! A different kind of hold request!" Five minutes later she was demonstrating how to recall a book and what a letter to the patron might look like. We became peers with the developers, programmers and all sorts of people at ExLibris. It was a feeling of empowerment and sheer terror.

It was the same experience with Acquisitions. We met with Yohanan in a small bistro in Denmark went through the typical workflow, drawn on the back of a serviette and had a working (American) prototype the same week.

The adaptability and flexibility of the system still amazes me. The question of "why do you want to do that?" kept us honest, made us think of how we had traditionally done things and how to look at those traditional methods in a new light. We were not merely a customer we were co-developers, co-conspirators, and that required trust at all levels.

Most important to me was the actual migration of data from NOTIS to Aleph. It was crucial to map specific fields, retaining circulation history, acquisition records, vendor records – all those details and decisions on what to migrate (everything) and what to ignore (nothing). Long hours, lots of code and then a miracle occurred: It actually migrated everything we wanted and some we never knew we wanted.

5...Who were Aleph/Ex Libris' main competitors?

Keeping in mind that the University of Notre Dame, who took the lead on this project, is very conservative, fiscally responsible and not known for [library system] risk taking. ExLibris had a very minor presence in the US with a special collection at (the Jewish Theological Seminary in NYC). This was a big risk.

To evaluate various systems we undertook the "Road Trip Across America" (over hill, over dale, we will hit the dusty trail...) included visiting installations of Innovative, Sirsi, Ameritech (NOTIS), and Endeavor. However, we were just the "customers", they were the experts. There was no give-and-take. When we compared the "corporate culture" of these systems to the rather free-wheeling culture of ExLibris it became the system of choice. No – they had no extensive record, they were not a huge corporation, but they were willing to listen, take risks *with* us, and be partners.

The fact that places like CERN and other European libraries had selected ExLibris and that peer U.S. and Canadian institutions were also interested in Aleph tipped the balance.

6...I think that two early decisions were very important:

- support of standards: the MARC and MAB formats, and, later UNIMARC
- the early use of Unicode, the ability to handle multiple languages and scripts – Hebrew and English from the first and, very early, Danish/German/Italian – laying the groundwork for making Aleph a system which could be implemented in virtually *any* language
- Others?

7...Comments on the role of user groups (ICAU, NAAUG, SMUG, etc.)?

NAAUG = North American Aleph Users Group. First *international* meeting was held at the University of Notre Dame I think sometime in the spring of 1999. Participants included: the University of Notre Dame, Saint Mary's College, Holy Cross College, and Bethel College. Supporting participants, if I remember correctly, included McGill and Harvard who were also on a quest to replace their LMS. ExLibris sent representatives from the company. It was small, it was intense, and it was a really good time.

8...Were there particularly interesting/valuable Ex Libris staff that you remember?

The Wild Bunch: Luis Lacayo (of course), Judy Levi – the woman who knew everything, Yohanan Spruch – the Professor, Oren Beit-Arie – smart, serious, and funny, Jerry Specht (Mr. ExLibris), and Barbara Rad-El (the voice of reason). Also John Kolman (trying to keep things under control), Herbert Van De Sompel (awesome!), Marc Daubach (aka the European MARC standard) and Naomi – from whom we learned about kosher Easter candy. And then there was the “retired” Israeli Air Force pilot with “bad knees” -- all of 27 years old.

9...It seems that, with ALEPH 500, the choice of a Linux / Oracle environment was important -- but maybe most of the competitors' products also operated in this environment?

At the time many were considering it but there was one company was determined never to part with the terminal based system.

10...Are there particular interesting, fun, or odd things that you remember?

I want to say that some extra rolls of cable made their way from the dumpster at Saint Mary's to the Chicago office, which was in someone's house, in the back of someone's Jeep. And a few no-longer-used “dumb” terminals made their way secretly from Saint Mary's to some branch libraries that were not quite ready to trust that whole client-server thing. But I would be just speculating.

11...If your library has stopped using Aleph, when did that happen – and what was the successor system?

12...If you moved to a different library, please describe briefly your history since that time.