Ex Libris Staff (1980-2005) Questionnaire – Jo Richardson

[Feel free to say as little or as much as you like. Do *not* feel that you need to answer all of the questions…. Talk about whatever you like (in regard to your work with Ex Libris).]

1. When did you start working for Ex Libris?   How did this come about?

   I started in June 2000, having left Dynix, where I'd been since 1989. Julie Booth suggested I meet with Marc Daubach and a job offer followed.

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

   I think we were called system librarians but I could be wrong. At first, it seemed I did precious little! At that time we did not have access in the UK office to a copy of Aleph, either in house or via the 'ram' server. So I was advised to read the documentation and learn as much as I could. Occasionally we (the other 2 system librarians and myself) would help prepare a bid. Mary Ren and Debbie Cheesman were there before me and we were really supposed to be trainers. There is only so much documentation one can read without access to the software. The thing I remember most, which interested me the most (being someone who likes to understand what's going on 'under the bonnet') is the Database Management Guide, for which I think we have Babara Rad-El to thank. This gave me the earliest inklings of how Aleph was put together and I began to realise how clever the construction was. I was fascinated and hooked.

   In September that year, Mary Ren and I attended "Fresher" training: 2 weeks in Jerusalem. After that, we began to have access to the ram servers and to customer systems, and to do 'real' work. As the UK operation grew, I was focused more on new sites as per the original intention behind my appointment. I did system analysis, project management, training and data conversion specs for new sites, with support initially from more experienced colleagues from various places, initially coming from Poland and then, for data conversion, from Cape Town. Later on, I was Ops Manager for the UK, and in the last year, a change to be Aleph Product Manager.

   Thinking of the 1980-2005 time period….

3. Why was Ex Libris as successful as it was? Why did customers go with Aleph rather than other systems?   Some possibilities:
   a. Superior system and program design? (-- primarily Yohanan's doing? Others?)
   b. Superior functional design? (-- primarily Judy Levi's doing? Others?)
   c. Superior strategy (Oren Beit-Arie -- and others?)
   d. Superior marketing (Barbara Radel, et al.)
   e. Superior organization (Azriel and Udi and ???)
   f. Other?

   I can only give a personal view and there are far greater experts than I could claim to be. But for me, from memory, two factors stand out:
   1. ***Confidence**. I had come from Dynix, where times were not the best, and had been accustomed to approach new prospects with a cautious assessment of how much chance we might have. Ex Libris mad a similar assessment, but 2 things were different: firstly, ExL went*

for the biggest, most prestigious institutions apparently without hesitation, even in a new market. If a national library was out to tender, Ex Libris would bid. There seemed to be no wish to start small. Secondly, there was an <u>absolute expectation</u> to win. There was a very strong belief in the product, and a confidence that once the company's greatest experts (usually Barbara, often Judy, sometimes even Yohanan or Omri) had shown the customer what Aleph could do, there would be no reason for them to choose anything else. Why would they when Aleph was the best? That confidence trickled down to us. It was exciting and refreshing. Ex Libris did not send in sales consultants with limited product knowledge to show the product – they sent Barbara, and sometimes they sent Judy. This level of expertise was impressive to everyone.

2. **Functionality***: the fact that *almost* every "can it do….?" Question could be answered with a "yes". It was all in the configuration. The design of Aleph was so clever (so it seemed to me) that you could make it do almost anything the library might want, to support the most particular of library rules and practices. And if a development was required, once committed to, it was delivered in the expected release and became part of the core product. Ex Libris understood both library requirements and technology, and was a leader in both. This was not often true of the competition.*

4. Who were Ex Libris' main competitors?
You'd be better asking someone in sales but this is what I can recall from the UK: Dynix's Horizon product was still weak but was improving. There was a Birmingham (UK) based company called Talis which I think tended to go in cheap and picked up smaller deals or those where money was critical. Technology was old but it had a history of being a co-operative, i.e. non profit making, so some institutions had some loyalty to this, and it was cheap. Aleph was expensive, and this could be a problem. Some potential customers wanted to buy a Rolls Royce for the price of a Mini. Innovative competed on price but also on simplicity – they adopted the opposite approach from Aleph. With their product, there was very little parameterization, so very little flexibility, but the attraction was the fact that it could be installed and used pretty much right away – the 'black box' approach. Aleph could do almost anything, but there were a lot of tables to set up, and at that time it was using the vi editor. Voyager was at the time also a competitor.

5. I think that two decisions – perhaps just coincidence or luck – were very important:
    a. the use of the MARC standard – absolutely critical to success in North America (and the UK?), perhaps less so in Europe?
    Yes, crucial to the UK and initially, the ability to tweak what was then USMarc to UKMarc, which looked the same superficially but had a lot of differences. I can't speak authoritatively about Europe, but I do know that Aleph also supported Unimarc and other Marc standards and this was key to success in those countries: in essence, Aleph was not limited to a set of US based standards any more than it was limited to the English language. It was a truly international product.
    b. 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
    *This was important in the UK academic market and how I would have wished for it a few years earlier when the UK Dynix office was having to do its own development to enable Dynix to support diacritics and an extended character set, using escape sequences. The fact that Aleph could do this **before** Unicode meant that Unicode support was a given,*

and the company completely understood the use of different character sets, and didn't have to learn about it because it was a customer requirement – as in many other areas, Ex Libris led the way rather than reacting to market requirements.

    c.   Others?

6. Comments on the role of user groups (ICAU, NAAUG, SMUG, etc.)?
The UK user group seemed quite polite compared to some of my previous experiences with Dynix user groups in the UK. Early customers struggled with implementation at times, they really needed more help. Aleph was like a precision engineered, top quality car, but you had to assemble a lot of the parts and tune the engine yourself. I recall the UK user group expressed some discontent about this, while at the same time never wavering in praise of the product. As Product Manager I would have like to spend more time and effort than we were able, on user suggestions, of which there were hundreds and we never really got on top of the process. I wanted to work more on this but it was not possible – this was of course later, in 2008.

7. Were there particularly interesting/valuable customers that you remember?
Some of my previous Dynix customer came over to Aleph, notably York University and the University of East Anglia. UEA had really pushed the envelope with Dynix: I had personally spent many happy hours on site at UEA setting up special indexes for them initially using local UK development to get Dynix (Classic) to do what didn't come naturally. Therefore it was a delight to implement Aleph, which could do everything they wanted as standard: once they understood the configuration, they could do it themselves. For customers like this, Aleph was really empowering.
*Of course, we shouldn't forget the British Library, which as far as I know was one of the first (if not **the** first) use of the Merge utility. They had about 17 Marc databases, possibly more, with massive duplication and difference in standard of record, and we merged them all into one.*

8. Were there modules which you felt were particularly good, distinguishing Aleph from other vendors' versions of the same module?
Cataloguing. I'm not a cataloguer but have had to learn quite a bit over the years and Aleph is the best. Other systems often support the Marc standards to a degree, doing clever things behind the scenes to simplify things for the user, but this limits what the user can do. Aleph allows the library to define the level of detail seen and edited by cataloguers, and presented to the users – not within limited parameters, but all the way.

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?
Well, I think they were the right technology decisions for the time, as was the programming language. Dynix's Horizon product originally used Sybase for its database, and developed it in a language whose name escapes me, for IBM's OS2 rather than Windows. Every choice turned out to be wrong as far as the market was concerned and the whole thing eventually had to be rewritten at massive cost. Some experts would say that Sybase was better than Oracle and they may be right (who knows?) but in the end it's what the industry adopts that determines success. These choices are critical and Ex Libris made the right choices from what was available at the time. The down side was that Unix/Linux and especially Oracle required a level of on site technical ability that did not always exist in a library setting. Not all libraries had an Oracle DBA available, and Oracle had to be properly looked after. Aleph's Oracle utilities were a massive

help but it was an issue. Some potential customers simply couldn't find the technical resource. Long term, I think we would have looked at running systems for customers.

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

Take a look at the UK Office when I joined (I think this was actually the second UK office and apparently an improvement on the first – hard to believe). The entrance was the doorway between the Creative Crafts shop and the Raymonde Roma hairdresser. Sometimes people slept in the doorway (I don't mean staff!) and there was often the remains of last night's beer cans or take-away to negotiate. The term 'serious dump' doesn't begin to describe it.

When we were bidding for Iceland, they insisted on visiting the offices. This resulted in some serious vacuuming, and I sent my husband out to Athena near his office in East London, to buy some stylish black and white photographs of New York cityscapes in clip frames. We put these up and they actually looked almost good against the yellow walls. Some time later, we persuaded Marc to stump up £200 for a sink and water heater at one end of the so called conference room, so that we didn't have to use the sink in the toilets on the landing to wash our mugs after coffee. In the summer, it was sweltering, but with a main road on one side (traffic noise, fire engines etc.) and the main railway line from London to the West on the other side, opening the windows was not an option if you wanted to have a conversation. The one good thing was that at about 11 a.m each morning, if you were at the right window, you could watch Concorde take off from Heathrow.

What else?

I spent 2 weeks in Iceland working on data conversion with Michal Marchlinski from Poland. Iceland is an extraordinary place, but if they offer you the Viking dinner, don't. We had some shark 'prepared in the Viking way', which is to say you catch your shark, you bury it for 2 months or so, then you dig it up, chop it up and eat it with Schnapps. I have never been so ill. I made it into the library about 11.00 the next day, where Sigrun, our customer, was kind and sympathetic. I think she intended to say "Jo, you look awful" in response to my deathly white appearance. What she actually said was "Jo, you are horrible to look at". Just about finished me off.

I'm sure there are other things but the main comment I would make in all seriousness would be that I met and was privileged to work with some really extraordinary people, in a truly international environment. Some of those experiences, working with the most talented, clever, dedicated and focused people I've ever known, will stay with me for ever.

11. When and why did you leave?

I left at the end of January 2009 to join Capita as a project manager. The reasons for leaving were complicated. I was Product Manager for Aleph and also working on some of the specs for what was then called the URM. I wasn't sure I really understood this new electronic library world and while it was interesting writing specs for the new product, I wasn't confident and my heart was still with Aleph. If I'd had that job a few years earlier when Aleph was in its prime, it would have been my perfect job (assuming professional singer or show jumper still out of the question). Capita was very good to me, I was valued and given complete freedom to define how we delivered implementations. Nevertheless, a colleague did say once when I'd been talking about something from my time with Ex Libris, that I "lit up" when I was talking about Aleph. I suspect that was true. I left a bit of my heart in Jerusalem.