

The Notre Dame / Ex Libris Story

Contents

| | |
|---|---|
| <From Doug Archer:> | 1 |
| <From Laura Sill:> | 2 |
| <From Doug McKeown:> | 2 |
| <From Jennifer Younger:> | 3 |
| <From Jeffrey Kantor:> | 4 |
| <More from Jennifer Younger:>..... | 5 |
| <From Jim Wruck:>..... | 5 |
| <Postscript from Jennifer Younger:> | 7 |
| Photos..... | 8 |
| Katherine Ward's remembrances..... | 9 |

<From Doug Archer:>

I must rely on others to fill in the gaps but here's my memory.

There were no full installations of Aleph in the U.S. or Canada when we were looking, but there was a small installation at the Ohio State Library for their Judaica collection.* We did not do a site visit.

A team (Mary [McKeown], Lorry [Zeugner], Laura [Sills] and myself plus ??? and Kate [Ward] from Saint Mary's, flew to Copenhagen and visited the nearby Danish Technical University Library ("DTV"), and then the University of Ghent. I don't remember the names of the contact people in Denmark or Belgium, but I do remember Yohanan meeting us in Copenhagen and working out acquisitions problems with Lorry on a napkin in a coffee shop! I also remember his "sales pitch." Don't tell us how to solve the problem; just tell us what you need and we'll work it out --- or something along that line.

This struck me at the time because so many others were quite willing to tell us what we needed rather than asking us what we wanted.

I was not involved in the Jerusalem trip which I believe occurred after ND made its commitment.... That's about it off the top of my head.

[* Similarly, the Jewish Theological Seminary, in New York City, the Index of Christian Art, at Princeton, and the Annenberg Research Center at the University of Pennsylvania had Aleph, but

it was Aleph 300 and they weren't using it as a complete ILS in the way that Notre Dame intended to.]

<End Doug A.>

<From Laura Sill:>

My focus was primarily on serials at this time, and the Denmark/Belgium trip gave Notre Dame an opportunity to discuss this area with customers and see workflow in action. As Jennifer noted, we followed up with the trip to Israel to discuss specifications for the developing serials application in the new client/server system. With about 6 weeks lead time, Pam, Mary and I were charged with writing a spec document to present for discussion in Jerusalem to Udi, Oren, Judy and Yohanan.

Lorry would need to speak to acquisitions functions that were new, but on the serials side, I remember integration of the MARC Holdings standard into the system being one of the key goals we in serials had going into the Jerusalem meeting.

<End Laura Sill>

<From Doug McKeown:>

Here I've been worried about Marine Corps flashbacks my whole life and it turns out I should have been more concerned about ILS implementations!

*laugh

So generic remembrances and weak timelines of my thoughts.

I was on the committee from the OIT side of things as I was the Mainframe and Unix (Solaris/AIX) Systems Administrator along with Oracle DBA experience.

Key points I remember on the selection of Aleph over other vendors.

*) Total capacity of held records. (Even though we later needed to grow the Aleph system number due to needing more than 10m records.)

*) Use of non-proprietary DB technologies (Oracle backend.)

*) Sun/Solaris backend due to a significant cost savings on hardware and maintenance for Higher Education.

*) Commitment from Ex Libris of staff and functionality to enter NA market.

Shortcomings in Aleph at the beginning:

*) Circulation was an immature concept as European libraries didn't check out books as a rule.

- *) Multi-library holdings were not as robust as competitors.
- *) Authorization/Roles were very immature to match a more fine-lined user access model.
- *) Acquisitions, beyond base purchases, were immature. Annual budgeting, reporting and similar workflows were lacking.
- *) MARC holdings (already better explained than I ever could.)
- *) Who remembers label printing? I'll bet Jerry does!

The trip to Israel occurred very early in the implementation process. Aside from the visitors to Notre Dame and the people we met during the trip to Belgium, no one had really met with "all" of the Ex Libris staff. This partial PR/partial Technical roundtable made remote work easier in the long run as faces could be put to names.

James Steenbergen was one of the first Aleph employees in NA and the building of the Chicago office along with Jerry, Luis, Oren, Carl was a start.

James joined us on the trip to Jerusalem and provided a lot of value from his experience and his access to EL in general.

That's about all I have off the cuff. I'd recommend a weekend reunion of all the involved parties with an open bar to get ALL the memories back. Just make sure we have a designated scribe.

<End Doug M..>

<From Jennifer Younger:>

I arrived (as library director) at the end of the ND investigative process. The Task Force had completed its work and recommended adoption of Ex Libris to then acting library director Maureen Gleason in late summer or early fall 1997 but Maureen and/or the Provost decided to hold off until after I arrived in November 1997. Subsequently, we brought 2 of the contenders back for discussions to include me, Jeff Kantor, Associate Provost at the time, and other stakeholders. After this round I was pleased to agree with the recommendation of the Task Force and we adopted ALEPH as our ILS. It could have been as early as December 1997 or later in early 1998 when we finalized the decision, signed contracts, announced to campus and so on.

Coming from Ohio State, I did know of ALEPH because as Mary mentioned, Ohio State was running an ALEPH catalog instance to display vernacular script for Judaica materials. Certainly display of vernacular script was important to us although I don't think was a driving factor. I also remember that the Vatican Library was not a factor at all. We were interested in the whole ILS. What I do remember is that, while the desired functionality was not yet in place, a couple of my colleagues in the library automation world outside of ND said the underlying architecture of the ALEPH system was excellent and a reason to seriously pursue Ex Libris and ALEPH.

I also remember that the visit to Jerusalem was after we decided to adopt ALEPH. The purpose was to discuss what was needed for the serials component, which we saw as a major gap in the system functionality.

We went into Production with ALEPH in January, 1999.

<End Jennifer Younger>

<From Jeffrey Kantor:>

Many thanks for reaching out. I certainly remember this well since there was so much riding on the decisions.

This all took place while I was serving as Vice President and Associate Provost. At the direction of our then Provost, Nathan Hatch, my job was to be sure you (Jennifer), our newly recruited head of the University Library, had the resources needed for a successful evolution of the Library system. The Library system was in horrible shape, everyone was frustrated, the Provost wanted to see a much-improved environment for scholarship. The business side of the University was nervous about the potential cost, and our Office of Information Technology had its hands full with many other issues so not eager to take on another challenge. There had been prior work on the issue under the acting Director Maureen Gleason, but no one wanted to act before you (Jennifer) came to the University as the new Director.

I enjoyed our many conversations during that time as you developed a strategy for system replacement, got everyone on board, and very carefully put together a group to search out alternatives and review the prior work. There were a lot of pressures, including plenty of unsolicited advice from highly-placed folks. Some were suggesting Ameritech's Horizon system as the obvious choice. All were sure what the library ought to do, and more than happy to offer (sometimes shout) their opinions, no matter how divergent their views.

But here's the thing. Software is not about code. It's about people. Systems like this embody the understanding and experience of the people who create them, the people who use them. It's no accident that companies that buy up software startups often throw out the software and keep the people.

The group you put together understood this, did a superb job of sorting the alternatives, and figured what we needed to support a diverse community of scholars at Notre Dame. Their final recommendation of Ex Libris was a surprise to me, certainly to everyone outside of the community, and perhaps even to you. It appeared to do the best job of actually meeting the scholarly needs, but the other alternative had far higher visibility in the marketplace at the time. This was a time when universities were spending large amounts on new systems, and were looking for well-financed and stable corporate vendors. From that perspective, Ameritech looked like an obvious partner, especially since they apparently had Indiana University on board as an early adopter.

It took some effort, but the careful work your team put into the project spoke for itself. Oren Beit-Arie and Azriel Morag's presentation was certainly helpful, and I clearly remember Azriel

speaking to me directly and in very personal terms about his commitment to serving Notre Dame well. It was a mutual commitment to make the project work. I credit that commitment to the success of the project at Notre Dame, and eventually Aleph's success in the US market.

Hope that's helpful.

<End Jeffrey Kantor>

<More from Jennifer Younger:>

Jeff is absolutely right in saying it was about people. I heard that from the task force as well. They wanted a vendor they could partner with and believed Ex Libris was the best choice.

Jerry, I can't be confident of numbers on this as I don't have any records to consult but my recollection, in reference to Jeff's comment on "universities were spending large amounts," is that the Ex Libris fees were a cost-effective alternative relative to the other opportunities.

<End More from Jennifer>

<From Jim Wruck:>

I was in charge of the systems group at the time.

The first person to show interest in Ex Libris was Bob Miller, then the Director of Libraries at the University. He had tremendous insight. I don't remember the details of how Bob first became acquainted with Aleph, but in some of our discussions about replacing NOTIS, he told me that I definitely needed to look at Ex Libris.

Sometime after that, I went to an ALA meeting (I think it was in Washington) with no other agenda other than to interview 4 vendors about their systems. I'd made appointments with each of these companies and went with a set of specific questions for each vendor. I am certain that I didn't make up all the questions myself.

I met with each of the vendors for 2 hours. As I remember 3 of the 4 had suites in the hotels and I got wined and dined. The gentleman for Ex Libris, on the other hand, just met with me in a non-descript place – like the lobby of the conference center or something. He answered every question I had – very directly – no marketing - no fluff. He described the system, the process of managing it, where they felt they wanted to go with it. It was a very matter of fact, business-like discussion. It was clear that he knew the system. It was clear that he knew what he was talking about. It was clear that he didn't have to gloss over things. There weren't any "this is what we

think it's going to look like" screens. We talked extensively about the mapping of the Marc record onto a relational data base. Every answer was clear and exactly what we wanted to hear. I never got the sense that it was hyped in anyway. This is what we have. This is what we have done. This is what we can do. Period.

After I got back and briefed whoever – and I don't remember who all that was – we invited some, if not all, of the people I interviewed at ALA to come in and make presentations. In most cases, those presentations were the first that most people in the library saw of Aleph. Subsequent to that, a team was formed to select a system. You have that set of names. We did send a team to Europe as has been noted and they came back fairly encouraged. And some people visited schools in the US that were running competitors' systems as well: Vanderbilt, Indiana U., Missouri, and Kansas State. [Think "road trip", by van.]

The people that, I believe, did the most extensive analysis of Aleph were Laura Sill and Doug and Mary McKeown. I haven't seen any comments from Laura and I'd recommend you reaching out to her directly for her impressions. She is a very busy person. She'll kill me for recommending her, but tell her that I did.

A couple other comments I'd make:

As several have noted, the fact that the Vatican had Aleph never entered into the conversation.

Upgrading to Aleph was a challenge. Upgrading to any web-based / client-server system would have been a challenge. At that time, pretty much the entire staff of the library – and that includes the Librarians – who would balk at being referred to as "staff" - were quite inexperienced with PCs. They worked with a terminal based system (NOTIS) and that was pretty much the extent of their computer expertise. There were a few PCs in the library, mostly 386's and I think four 486's. Our first challenge was to educate a staff to be PC-literate. In addition, there were minimal capital dollars allocated in the entire Library operating budget – hardly enough to buy a half dozen computers for an audience of roughly 130 staff – and those allocated capital dollars were the same ones used for bookcases, chairs, desks and everything else. Acquisition of Aleph was much more financially difficult than just the cost of the product itself – which in itself required additional financing from the Provost Office, which is why Jeff Kantor became involved – because capital dollars had to be reallocated from traditional things like serials and acquisitions over a lot of objections. Aleph was a bigger issue than just changing the LMS.

<More from Jim Wruck:>

You need to understand the situation then. The Librarians were unbelievably frustrated with the fact that they couldn't get anything changed with NOTIS. They had a backlog of requests that were three years old in some cases – probably some of those, the systems staff should have been able to fix but didn't. I gathered all those requests into a pack and asked systems people at two other NOTIS universities to evaluate how long they thought it would take to program all those changes. They both came back with estimates of about three years of work for two people.

So when Ex Libris showed them a system that 1. Made most of their requests go away and 2. Promised to fix things in short order that they viewed as flaws, you were 90% there. You had a system that worked, wasn't vaporware and a company that was responsive to needed changes. Aleph walked into a perfect situation. Everybody else had promises. You had deliverables. I didn't see much to the decision – except for one issue. Aleph required a lot of staff involvement – setting up tables for one – I don't remember all the things. Aleph had much more user flexibility – but flexibility that the user had to get involved with. It was the effort of people like Doug and Mary and Laura that made the thing go.

<End Jim Wruck>

<Postscript from Jennifer Younger:>

The recollections of Task Force members and Jeff Kantor provide the library and campus context which is key to understanding the decision to adopt the Ex Libris system. In the end, it was people, as Jeff notes, but including the people at Ex Libris as well as the entire Notre Dame team of people, who, after many discussions and debates, came together in recommending the Ex Libris solution. My responsibility lay in knowing what alternatives they reviewed, understanding their reasons for their recommendation, and in the end, supporting their collective wisdom about what was the right choice for Notre Dame.

Photos



(Below) Five Americans in Copenhagen with their Danish hosts, Frank and Inger



[Katherine Ward's remembrances](#)