

Ex Libris Customer (1978-2005) Questionnaire

[Feel free to say as little or as much as you like. Do *not* feel that you need to answer all of the questions. *Thinking of the 1978-2005 time period....*]

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

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

- In 1998, the SUNY Council of Library Directors passed a resolution that all SUNY campuses would migrate to a common platform. At that time about 40 campuses were using the MultiLIS system, and the remaining campuses were on a variety of platforms. I was hired by the OLIS in 1998 to work on the development of the RFP and to coordinate the evaluation process.

Timeline:

- 1999 (January – March) Request for Proposal (RFP) was released
- 1999 (August) Recommendation for the Aleph500 system was made; approval was received within SUNY to engage in contract negotiations with Ex Libris. The recommendation was also reviewed within the context of SUNY' strategic planning for technology.
- 2000 (May) Contract was signed by Ex Libris (Carl Grant, President) and Dr. Peter D. Salins (SUNY Provost and Executive Vice Chancellor). The contract was then sent to the New York State Attorney General's Office and Office of the State Comptroller for final approvals.
- 2000 (October) Contract received final approvals and the first campus migration (Fredonia) began.
- 2000 – 2006 Ultimately 60 campuses migrated to Aleph from a variety of systems (DRA, Dynix, GEAC, III, MultiLIS, NOTIS, PALS, SIRSI, Winnebago)
- Note: in 2013 one last campus migrated from Voyager to Aleph

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

- Hired in 1998 as a Project Manager
- 8/1998 – 8/1999
 - coordinated development of a Request for Proposal for a library system to be used SUNY-wide
 - coordinated the work of a SUNY-wide committee in the formal evaluation process for the selection of the library system
- 8/1999 – 3/2006
 - participated in contract negotiations with Ex Libris
 - began work with SUNY ITEC (Information Technology Exchange Center) to develop the shared server environment for all campus, other than the four University Centers.

- coordinated the planning and implementation of Aleph across 60 SUNY campuses; worked with campus librarians, networking and computing support personnel, Ex Libris and server hardware vendor representative, as well as staff from the OLIS
- 2006 –
 - management of activities to ensure the ongoing maintenance of Aleph and the SUNY-wide catalog including planning and project management associated with upgrades, service packs, enhancements, and special projects. Over time there were version upgrades from v12 to v14 (Fredonia) then for the rest v14 to v16 to v18 to v20 to v22. There have also been multiple hardware upgrades: Solaris to AIX to Linux (two different Linux hardware upgrades)

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

The RFP evaluation criteria was based on functionality, system capabilities, vendor viability and cost. Further the Evaluation Team focused on functionality that was in production rather than development, would support the range of needs from the smallest to the largest SUNY libraries, and would provide consortial services.

Excerpts from the announcements sent to the SUNY community regarding the selection of Aleph:

- "An analysis of functionality, system capabilities, cost, and vendor viability concluded that Ex Libris and the ALEPH500 system significantly surpassed the other finalists by demonstrating essential library functions, required networked system capabilities, excellent responsiveness to customers' needs, and highly developed consortium components."
- "ALEPH500 is a full-featured system that has all standard modules in production. Based on current client/server architecture built on an Oracle database, ALEPH can be easily customized."
- "Support for consortia is a solid strength of ALEPH. The system provides multiple options for configuring local control of library data within a shared environment."
- "Multi-lingual support for over 17 languages enables patrons to select the language interface of the OPAC. Great flexibility is allowed in the design and content of the OPAC screens."

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

Six vendors submitted responses to the SUNY RFP in 1999:

- Ameritech (the product name may have been Horizon)
- DRA
- Endeavor
- Ex Libris
- SIRSI
- VTLS

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?

The client/server architecture built on an Oracle database was a big plus as was support for consortia.

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

SUNY was well represented at NAAUG in the early years (Notre Dame, McGill, Iowa, MIT, University of Maryland come to mind). It was a great opportunity to meet representatives from various consortia and to work jointly with them and Ex Libris on issues impacting consortia. I also had the opportunity to present at the 2001 Annual ICAU meeting in Thessaloniki, Greece on SUNY's planning for a consortium.

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

There are so many Ex Libris staff that SUNY has worked with over the years. James Steenbergen gave a two day Aleph demo to SUNY as part of the RFP evaluation process. Early on Asaf Kline was involved in data migration and in helping to develop the SUNY Aleph configuration for campuses on the shared servers. Naomi Leiser and later Eva Krall helped develop the SUNY-wide Union Catalog. Marlene Harris, Mark Keeper, Michael Blake, Mary Croxen, Marie Erdman, Helen Gbala, Susan Marshall, Chris Holly, Laura Pierson (to name only a few) were very active in guiding SUNY campuses through the implementation process. While Jerry Specht continues to provide outstanding Aleph support, Luis Lacayo and Randy Menakes, where also go-to people in the delivery of Aleph support.

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?

Other vendors that responded to the SUNY RFP had relational databases. Not all were Oracle based.

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

During the RFP evaluation process, the NOTIS sites being happy to hear that Jerry Specht was moving to Ex Libris to provide support.

A visit to the original Chicago office...

Luis Lacayo's visits to ITEC.

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

SUNY is still using Aleph. We are currently in contract negotiations with Ex Libris regarding Alma and Primo. Hopefully the formal contract process and approvals will be finalized in time to begin the implementation process next year.

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