Map of/Excerpts from Jan. 18, 2017, Interview of Oren Beit-Arie   (-- still under review as of 14-Feb-2017)

Link to complete unedited (3-hour) audio recording of interview
(Firefox and IE work better for me for moving around the recording; the Chrome bar for this is too small.)

In reviewing this recording, Oren and I have realized there were certain omissions:

- *Luis Lacayo* was a very early (the first!) Ex Libris U.S. employee. He played an important role in setting up hardware and systems software for Notre Dame and other early customers -- and in maintaining our own internal systems.

- *Carl Grant*, the first Ex Libris U.S. president, played a critical role in the creation/structure of the Ex Libris North America operation. (**Plus**, *he provided all the photos of the first U.S. office seen at* http://jspecht.org/exlibris_history/jerry.kickoff.2017.pdf *.)*

- *Russell McDonald*, the first Vice President of Sales & Marketing, was instrumental in signing certain key early Aleph customers.

Interview map/excerpts

h:mm:ss

0:00:00 Introduction

0:01:00 Yohanan; ALEPH before Oren (1978-87)
     0:03:45 Yohanan's pre-Oracle, indexed sequential database

Programming languages
0:04:30 COBOL, "C"
0:05:00 Oren hired (1988); improve sorting routine by at least 50%
0:07:30 COBOL
0:08:30 "C"; I/O layer / "I/O engine"
0:10:40 Parallels to Jim Aagaard/Assembler
0:11:40 COBOL, PL/1, "structured programming"
0:14:40 Advantages of COBOL
       *Handle large data
       *Compile same code for VAX/Unix; portability
       * Structure
0:17:00 C++ for GUI
0:17:30 Keyword/Boolean
    0:19:30 ALEPH z97/z98/z95
    0:20:20 Proximity for DTV
    0:21:40 z980 ("temporary" z98)
    0:23:00 Google (no proximity; no truncation/wildcard)
    0:23:45 Oren: ALEPH forced to be compliant
    0:25:00 "incredibly challenging academic exercise that I doubt had any effect on scholarship"
    0:26:20 Browsing; Northwestern University
    0:27:50 "doubleword" for adjacency
0:28:30 "What got them to choose us was the architecture"
0:29:00 Oren/DTU (1989) ALEPH 300 … "That was my library school"
0:32:30 Jerry: "Library systems are interesting enough to attract really good programmers"
0:33:50 Oren: "… serving the mission of the library … the pleasure of working in this field is
not just the challenges … also the people you work with; librarians are often times very smart …
  It's always helpful to work with people with passion".
0:36:50 Fax / paper / telephone; no remote connection to sites; no Internet
0:39:20 Yohanan, traveled; "Yohanan worked really hard but he also had a really good time"
                "A very intense year"
0:40:20 Oren's father: Israel National Librarian "I certainly grew up in a house of books"
    Per Udi: Oren expert in linguistics
    1991-4 worked on Master's degree in Theoretical Linguistics
       Worked part-time for Ex Libris and ALEPH-Yissum
0:46:50 Consortia; mid–'90's
   0:48:45 CDL
   0:49:15 SUNY
    "decoupling of discovery" in 2000's
0:51:30 Ghent, Aleph 500
   Herbert von de Sompel / SFX

0:53:30 Jenny Walker, Silverplatter

    "first ideas about how to create linking"

0:54:30 Oren: programmer, analyst, and … "it was a time …

      we didn't know what product management was … we did everything"

0:56:00 mid-'90's high-level pilot work

0:56:45 Omri hired, took on GUI

0:57:20 "More time going places" Bibliotheque Nationale:

    "much work … didn't win the bid … just as well; they had so many requirements"

0:59:45 "We got a lot better as explaining our story"

   1995: "Crucial decision to go with Oracle"; multi-tier architecture; beginning of Aleph 500

1:01:00 Parallels between Aleph and NOTIS (Northwestern On-line Total Integrated System)

1:02:00 Differences: Aleph/Yohanan openness to outside world

   "Yohanan understood very well that writing a unique solution for the Hebrew University is unsustainable … In order for this to have a long shelf-life … it needs to have an audience and a market larger than just the Hebrew University … Very much aware of sales."

1:05:20 Important to maintain one source code

1:06:00 Jerry: "Tensions in what would be developed?"

1:08:00 Big changes in those years

    1:11"15 Client-side programs had to be created from scratch but many server programs could be converted from VAX VMS (COBOL) programs

1:12:30 Harvard/Taos (1998) "object-oriented" Harvard visited Jerusalem. Harvard/Wisconsin; Dale Flecker / Nolan Pope.

1:15:55 Why did Taos fail?

     Jerry: "Developing a system from scratch which meets the needs of all of these kinds of libraries is a daunting task, to say the least"

1:17:10 Ex Libris has pretty much stuck with the academic library market

    Differences between public and academic libraries. "Are the differences real?"

        1:19:20 Oren: "I actually think both…

          DRA/Taos: "Use of totally new, unproven object-oriented database technology…. They set themselves to an undoable task, I think."

        1:20:30 "With regard to public libraries, I think it's a little of both: real differences, perceived differences."

          Possible "public library flavor" of Aleph

       1:23:00 Debate within Ex Libris about whether to go after public libraries

         *We didn't want to get de-focused"

         *Public library finances on downward trend … we didn't see this as an attractive business"

1:26:00 Alternative paths of growth

       * Parallel (other kinds of libraries)

       * Vertical (associated functions within academic market)

"We definitely took the position of selling more things to the same buyer."

1:28:10 Ex Libris North America

        1998 **Oren** moves to Chicago

        2001 Oren moves to Boston; SFX

1:30:30 Boston office

        "Engagement with SUNY", office closer to Albany

      1:31:50 Harvard

1:33:30 North American staff

    "Really good employees attract other really good employees"

        James Steenbergen - "certainly a key player"

          John Kolman (1)

      1:40:30 **Jerry -** Fostered Support Knowledge Base

        Oren: **"**Respect customers as peers"

        Jerry: "There's nothing more interesting you can do with computers than library/information systems"

      1:48:40 **Randy** (Menakes) "You just don't find people like Randy every day"

      1:53:45 **Marie** Bradshaw; **Laura** Pierson; Maruta

      1:54:20 **John Kolman** (2) "Just not good fit, I suppose"

        Galen (Charlton) -- Generic fix routines (fix_doc_do_file_08)

2:00:30 "Aleph built in a very modular way"

2:01:30 X-Services

    Make the system extensible; unique in having these tools so early?

    edit_field / edit_paragraph / edit_doc

2:05:20 Use of source code by Support in solving problems

2:09:30 Notre Dame

2:10:05 McGill

2:10:40 "They felt Ex Libris had the will and the ability to do the development they were asking for."

2:11:00 Oren: "… and think what's at stake -- this is the operation of a major ARL library"

2:11:20 "I can't overstate how fortunate we were to get their confidence in us, their trust"

2:12:20 Price (of Aleph)

2:13:20 Jerry: "Other vendors were offering more fully-developed solutions … but Aleph seemed more malleable"

2:13:40 Oren: "The uniqueness of this space, this sector [academic libraries]"

2:14:30 "These were people who were hired to do a library job, but they ended up, at least for a year, designing a system

2:15:20 " … "the right partner is key"

2:16:05 Jerry: "That flowchart … did Pat Riva do that?"

2:17:50 Oren: "Our job wasn't just to write code; our job was also to map their deep understanding of processes…"

2:18:30   **Judy** (Levi); **Naomi** (Leiser/Conforti); **Tami** (Trotter/Ezra)

2:19:00 Jerry: Aleph praised praised for its flexibility; criticized for its complexity … two sides of the same coin?

2:19:30   "arbitrary differences" … default values important

2:21:30   preconfiguration of the system for certain kinds of libraries?

2:23:00   "no debugging process for the setup"

2:24:00   "The only way to know if an option is really needed or not is to start from scratch" … Alma … "a little more conservative in terms of options".

2:25:10 Jerry: "It made things interesting for Support."

2:26:00 Jerry: "I'd like to give a shout-out to the Ex Libris Aleph programmers!"

2:27:20   "I think the Aleph programs are really good"

2:27:50   **SFX**/Metalib in year 2000 – expanded the market not just for Primo and Alma, but, even earlier, that for Aleph

                2:29:10 "placed a foot in the door … positioned us as innovators"

         2:29:45 **Herbert** van de Sompel; SFX as <u>open</u> standard; Herbert and team created "the framework and the product"

         2:30:50 Jerry: "Were there competitors, other people who recognized the value?" …

            SFX "summit" at Ghent

         2:32:30 Jerry: "What if Ghent hadn't bought Aleph and you had never gone to Ghent?"

         2:34:00   "I think you underestimate your importance"

         2:35:15 Importance of Knowledge Base

         2:36:10 Non-Aleph development partners

         2:36:20 Importance of name: "Open URL" vs. "SFX URL"

         2:37:30 NISO … "think-tank": EBSCO, *Nature*, CNRI

         2:38:45 NISO Committee AX -- **Eric van der Velde** (Caltech)

         2:39:00 Jerry: "I could see how with some companies this could have ended up some kind of proprietary thing … but I think this **was** a better strategy."

            Oren: "It wasn't any easy pitch [to Ex Libris management] … they got it."

         2:40:00   In parallel to this, Metalib was created – Yohanan

         2:40:45 SFX people: **Vlad; Jenny Walker** ;

         2:41:40 Oren: "We had two challenges: sell it to customers plus convince information providers to support the standard (create open URLs)

             Jenny Walker was instrumental

         2:42:30 **Nettie** Lagace; **Dana** (Sharvit); **Andres** Monroy Hernandez; **Vlad**; **Lieve** Rottiers

2:45:40 **Verde** "practice" for Alma; "Verde, I think, was a really important stepping stone for us"

2:46:50 Code name: "the Green Box". "The place where Verde 'failed' was the place where Alma excels: the unification …"

hard to create a standalone product … major components missing: Knowledge Base, bib records, Acquisitions

2:49:20 "Why couldn't Verde do what Serials Solutions did?" – started from the ERM, added the link resolver to it

2:50:30 "Looking back at these years, 1988 to 2005, what things are you, personally, most proud of having done in connection with Aleph, SFX, Metalib -- and Ex Libris in general?"

"Probably, if I had to choose one … SFX…. But bringing Aleph to North America would be a close second."

"A lot of people contributed a lot of good things."