CHRONOLOGY OF DANIELS / OLIS
as of July 7, 2004

1968   David Daniels begins research for *Orchestral Music*, with assistance of two grants from Rockefeller Foundation, via Knox College. Basis is personal examination of scores.

1972   *Orchestral Music*, 1st edition (produced on mainframe computer—ca.2600 entries), published by Scarecrow Press.

1981   Marshall Burlingame receives an NEA grant, through the American Symphony Orchestra League (ASOL), and begins research on the database that will become the Orchestra Library Information Service (OLIS), basing it on direct examination of orchestral parts (as opposed to scores) and consultations with orchestral percussionists on requirements (players and equipment). Much of the information is gathered from the library of the Boston Symphony Orchestra.[1] He also includes much further information, such as individual movement titles, dates of composition, presence of errata lists and the like. Work continues in the winters of 1982, 83, and 84.

OLIS was not originally conceived as a computer-based resource, and indeed it was first published (1986) as a 5x8 card catalog.

1982   Daniels: *Orchestral Music*, 2nd edition (typescript—3571 entries)

At ASOL annual spring conference in Washington DC, Burlingame gives talk called "The Orchestra Librarian and the Music Director." Daniels attends, and the two become acquainted.

1983   Marshall Burlingame becomes Principal Librarian of the Boston Symphony. ASOL's Donald Thulean works on creating the instrumental symbology for OLIS, and works with a percussionist consultant on the percussion entries (George Gabor at Indiana University). [Also various refinements giving "program page" information were added to OLIS—but this was probably later.]

Major Orchestra Librarians' Association (MOLA) comes into existence in Philadelphia, March 1983. It will gradually grow from an initial 25 member-orchestras to over 200 institutions worldwide. MOLA

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[1] From a communication from Donald Thulean: "Burlingame's objective was to catalog the BSO library. The Ford/Rockefeller grants were to help finance this effort, but [also] to underwrite new music reading sessions and ensure that OLIS would encourage new music as well as catalog the old."

members become very active in the development of OLIS and later OPAS, contributing errata and new information.

James Callahan, newly promoted to Personnel Manager (from Asst. Personnel Manager) of the San Francisco Symphony, consults a meeting of major orchestra personnel managers on the possibilities of using computer technology to ease their workload. He is interested in developing a computerized payroll system. However, his colleagues overwhelmingly believe a repertoire system would be preferable.

This leads Callahan to begin development of SOLI (Symphony Orchestra Library Information), with the assistance of his daughter, Claire Callahan Goodman, who is a computer expert. It is intended for desktop computers as well as multi-user/network operating systems, and is created in the Revelation database management system. Callahan markets it through his newly-created company Symphonia Software. Manually enters information from Daniels' *Orchestral Music* (2nd edition). Offered at an introductory rate of $1950 for the first 10 purchasers.

A second generation, dubbed "Super SOLI" and given as a free update to SOLI subscribers, includes the ability to track artists, and to enter artists in concert programs. A number of major orchestras purchase SOLI at a cost of $3600 each. In all, about 20 orchestras, from the New York Philharmonic to The Academy of St. Martin in the Fields, purchase SOLI.

1986   OLIS is published by ASOL (ca. 2400 entries on 5x8 cards). Marshall Burlingame, principal researcher. Grants from Ford Foundation & Rockefeller Foundation. According to Clinton Nieweg, Principal Librarian (ret.) of the Philadelphia Orchestra, the timings came from the performance cards of Ormandy with the Philadelphia Orchestra (and therefore do not include repeats of the exposition).

OLIS Users Advisory Committee listed in the Preface to the *Users Manual*:
> Joan Bricetti—General Manager, Saint Louis Symphony Orchestra
> Rheda Becker—Educational Consultant, Baltimore Symphony
> Mary Ann Coggins—Personnel Manager, Oregon Symphony
> Joseph Giunta—Music Director, Waterloo-Cedar Falls Symphony
> Frank Milburn—Artistic Administrator, New York Philharmonic
> Clinton Nieweg—Principal Librarian, Philadelphia Orchestra
> Peter Smith—Executive Director of Fort Wayne Philharmonic

ASOL's OLIS Staff similarly listed:
Donald Thulean—Director of Artistic Affairs, ASOL
Douglas Merilatt—Program Coordinator in Artistic Affairs, ASOL
Bob Olmsted—Director of Information Systems
Tamina Friedman—OLIS Project Assistant

1987   ASOL purchases SOLI from Callahan for $11,000. He signs an agreement not to produce any competitive product for five years; also he is forbidden to contact former SOLI clients.

ASOL modifies SOLI to accommodate OLIS; merges the two databases. Result: OLIS software with database of 4100 entries (2300 from OLIS and the remainder [= 1800] from SOLI).[2]

Heather Dinwiddie becomes the ASOL staffer in charge of the combined OLIS/SOLI. Claire Callahan Goodman expresses her willingness to help with any transitional problems that may arise. Heather Dinwiddie states that she is not allowed to make such consultation.

1989   ASOL begins using OLIS software to capture information on additional works from MOLA annual repertoire reports and premières listings.[3] These works, ultimately amounting to another 7000 items, do not have complete information. Heather Dinwiddie works at researching them to render the information complete, but does not finish all 7000. These 7000, in various states of completeness, are not added to the basic OLIS database of 4100. Presumably they are still in the possession of ASOL.

1990's   Creation of DOS version of the Orchestra Planning and Administration System (OPAS) by Hubert Woelbitsch (Woelbitsch & Partner, KG) in association with ASOL and Fine Arts Management (FAM). OPAS is designed to incorporate the OLIS database, or whatever database the user may have previously created. In the subsequent development of OPAS, a number of distinguished orchestra librarians are consulted who happen to be members of the Major Orchestra Librarians' Association (MOLA). Consequently the work is carried out according to

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[2] From a communication from Heather Dinwiddie: "It was decided that, because there were several very large orchestras using SOLI, the SOLI works that weren't in the OLIS database could not be removed, but that they should be distinguished somehow so that users would know that they hadn't been 'OLISized'. Each work had two title fields - TITLE and COMPLETE TITLE. TITLE was for sorting purposes and was all caps and COMPLETE TITLE was the title according to OLIS standards. The works that came from SOLI only had a TITLE and no COMPLETE TITLE."

[3] These reports and listings were begun by MOLA (spearheaded by Mary Judge of the Cinncinnati Symphony) in the 1980's, and taken over by ASOL in 1988-89. The project was retaken by MOLA in about 2000.

MOLA standards and practices, and the MOLA membership is kept informed about the existence of OPAS.

1996   Daniels, *Orchestral Music,* 3rd edition (personal computer—4236 entries)

1997   Large orchestras begin to adopt OPAS, using their own databases, which were usually their own expansions and modifications of OLIS. The OLIS software (as opposed to its content, the database) gradually dies out by attrition. As orchestras without their own databases begin to purchase OPAS, FAM arranges to sell them the OLIS database ($1500, half of which goes to ASOL) as content for their OPAS systems.[4]

2001   Kazue McGregor, Librarian of the Los Angeles Philharmonic (then President of MOLA) approaches Daniels and Tom Gaitens of FAM with the proposal that Daniels undertake to merge his database with that of OLIS. (The 7000 partial entries held by ASOL are available to become part of that merger at Daniels' discretion.)

2003   All parties agree in principle to the McGregor proposal, Scarecrow Press (publisher of *Orchestral Music*) being the last to come aboard. Details are still under development, but the result is to be a merged database that will:
    (a) be available to users of OPAS,
    (b) form the basis for the 4th edition of Orchestral Music, and
    (c) be placed on a website accessible by subscription.

In June, Fine Arts Management parts company (amicably) with the software portion of its business. OPAS will be sold, supported and developed in North America by a new company, Fine Arts Software (FAS), headed by Tom Gaitens.

2004   Agreements begin to be negotiated among the various parties (FAS, ASOL, Scarecrow Press, Daniels). Tom Gaitens converts the OLIS database to Daniels' preferred application (FileMaker Pro). After numerous false starts, Daniels begins the lengthy project of merging the two databases.

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[4] In September 2003, Tom Gaitens estimated that half the US clients plus 8-10 overseas clients have purchased the OLIS database for use with OPAS. Price unchanged from 1997-2003. 2004: 38 North American clients have OLIS.