At this program, three distinguished speakers, each representing a major consortium, provided their insights on their consortia automated systems and the larger set of supporting arrangements needed to keep consortia functioning. The three speakers were Dan Iddings, Executive Director of the Pennsylvania Academic Library Consortium (PALCI), Nancy Nathanson, Systems Manager of the Orbis Library Consortium, and Merryll Penson, Executive Director for Library Services, Board of Regents of the University System of Georgia. Penson described the GALILEO Interconnected Libraries (GIL) system.

Each of the represented consortia uses a union catalog product to enable a unified search of multiple systems and patron-initiated borrowing. Orbis (Innovative Interfaces INN-Reach) and GILS (Endeavor Information Systems Universal Catalog and Universal Borrowing [UC/UB]) employ physical union catalogs while PALCI (through epixtech's Universal Resource Sharing Application [URSA]) uses a virtual catalog created through the Z39.50 protocol. Iddings described the membership of the PALCI consortium; the disparate nature of the 24 public and private institutional members participating in resource sharing, along with the fact that member libraries use a range of integrated library systems, made the Z39.50 model an attractive option. In contrast, the Orbis and GIL consortiums are composed of member libraries with the same integrated library system platform (Innovative Interfaces INNOPAC for Orbis libraries, Endeavor Voyager for GIL libraries). Nathanson noted that the success of the Orbis consortium since it was made publicly available in 1995 provided an incentive for regional libraries interested in participating in Orbis to migrate to INNOPAC. For GIL, Penson described a process in the second half of the 1990s that led to the selection of a single system, Endeavor Voyager, for public universities in Georgia.

Taken together, the three presentations emphasized the opportunities available through the use of union catalog systems. Iddings, who serves as a member of NISO Standards Committee AV that is developing a national profile for Z39.50, showed search results from the PALCI virtual union catalog. Accurate holdings and circulation status information are available to PALCI searchers through the use of the URSA product. This capability is, as Marshall Breeding noted, a relatively recent development of Z39.50 technology (1). One of the demonstrated searches showed a shortcoming of the Z39.50/URSA approach: a title search of "red herring" in the PALCI catalog retrieved a record from the Tri-College Library catalog based upon table of contents information in the MARC 970 field. When the record is viewed in PALCI, the table of contents information does not appear; it is not apparent to the searcher why the record was retrieved. In contrast, a search of the Tri-College local catalog provides a display of the full record, including the contents information. In total, the results obtained in PALCI through the URSA Z39.50 union catalog are quite impressive: a union catalog containing holdings of catalogs using different integrated library system products; patron-initiated borrowing with automatic patron notification by e-mail when items are available; the availability of accurate item status information. PALCI catalog search and retrieval times, based upon testing, are typically in the 10-15 second range.

Nathanson described the Orbis consortium, including its use of the INN-Reach system. The Orbis catalog combines the contents of all member catalogs; it is continuously updated, with record changes and updates in local INNOPAC systems being constantly transmitted to the central catalog. The INN-Reach software has a number of features that make patron-initiated
borrowing very seamless, including the pass-through of searches to INN-Reach by clicking on a single button in the local catalog and automatic item selection with load balancing to even out the loaning and borrowing activity of member institutions. The result is a reliable catalog with 3.6 million unique titles that has become the catalog of first resort for users at many Orbis institutions. Nathanson described the workflow for a single Orbis request in INN-Reach. Importantly, the determination of eligible patrons, circulating items, loan periods, and fine amounts is set at the local system level, affording flexibility to member institutions. The workflow steps are highly intuitive; circulation activity at the patron site is performed in the patron's local system.

Penson described the GALILEO Interconnected Libraries system, currently being deployed at public universities in the state of Georgia. The system is scheduled for its public premiere in January 2002. Using Endeavor's Universal Catalog and Universal Borrowing products, the GIL catalog will provide a single statewide catalog resource capable of supporting patron-initiated borrowing. Both the INN-Reach and UC/UB software solutions rely upon physical union catalogs and there is a great deal of commonality between these products. Both products support automatic item selection, the setting of circulation policies for union catalog circulation in local systems, and essentially a common interface in both the local and union catalog systems. Like the Orbis implementation of INN-Reach, the GIL implementation of UC/UB supports redirected searching from the local catalog and accurate, dynamic status and holdings information. One difference between the Orbis and GIL catalogs is the display of item location and status information. In Orbis, a searcher can view item location and status information by clicking on a hyperlink that appears, along with a request item link, in the union catalog's bibliographic record. This information does not appear by default in the bibliographic display. In GIL, location information appears with summarized search results, and status and location information appears by default in the union catalog's bibliographic record. Each approach has its advantages; given that the catalogs can perform automatic item selection, suppressing the information from the default displays creates a more streamlined system for searchers.

All three presenters touched on broader consortium issues. Nathanson described how Orbis began administering a courier service several months after the existing service went out of business, leaving members to pay high shipping costs in the interim. Penson noted that a future goal of GIL consortium is to integrate the PINES system, the Georgia public libraries union catalog into GIL; she depicted the policy issues of integrating the public and academic union catalogs as possibly more challenging than the technical issues.

As noted, all three presentations provided insights on the opportunities available for the deployment of a union catalog system and consortium development. Two trends are making union catalogs a more viable option. First, the enhanced capabilities of Z39.50 systems, as illustrated by the strengths of the URSAS system deployed by PALCI. Second, vendors are making it possible for other integrated library system catalogs to be incorporated into their union catalog products. For example, the Prospector consortium, which employs an INN-Reach union catalog, has successfully incorporated libraries using the CARL system and is currently working to include libraries using Endeavos Voyager as a local catalog (2). The planned integration of PINES, which uses SIRSI's WebCat software, into GIL's implementation of UC/UB is another example. These trends suggest that in the future, libraries will have more flexibility in building consortium systems around union catalogs. In fact, the two technologies described in the presentations, physical union catalogs and distributed searching using Z39.50, are best viewed as complementary technologies that can be employed by libraries to support their resource sharing efforts (3).
References


URLs for consortia described in the presentations

PALCI - Home page
http://www.Lehigh.EDU/~inpalci/

PALCI - Virtual union catalog
http://palci.library.pitt.edu/~ursa/PITT_login.html

Orbis - Public home page
http://libweb.uoregon.edu/orbis

Orbis - Staff home page
http://libweb.uoregon.edu/orbis/staffhome

GIL - Home page
http://gil.usg.edu

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