funds. Additional processes, like returning items, claiming unreceived materials, and cancelling orders, were covered in less detail. Finally, types of order statistics commonly kept by acquisitions departments were enumerated.

The third section focused on vendor selection and evaluation. Because the relationship between libraries and the vendors who supply them with materials is so important, this section was lengthy and included citations to numerous articles to help students understand the role of vendors in library acquisitions. First, the types of vendors, including jobbers, dealers, and publishers, were examined. The importance of vendors in providing economies of scale, discounts, and services to libraries, as well as mediating between publishers and libraries, was noted. Students learned about services that may be provided by vendors, including financial services such as discounts, invoicing, and currency conversion; automation services; and outsourcing opportunities. The considerations involved in choosing a vendor were discussed, and the importance of the library's assessment of its needs and goals was highlighted.

Students learned the basics of planning a RFP (request for proposal) process, including preparation of the document, definition of minimum acceptable standards, and criteria for making the decision. The course readings highlighted the importance of assessing vendor performance. In addition to ensuring that contract terms are met, performance assessments provide data to support or contradict staff impressions of a vendor's service. A number of possible evaluation criteria were enumerated, and acquisitions librarians were encouraged to contact the vendor after performing the assessment to follow up on any problems identified. Financial risks to vendors, including late payment from libraries or the cancellation of large subscriptions, were discussed. Finally, the importance of periodically assessing a vendor's financial viability was emphasized. To alert librarians to signs of financial trouble, a list of questions that librarians should periodically ask about their vendors was included, to alert librarians to signs of financial trouble.

The fourth section was devoted to budgeting, financial management, and accounting. This lengthy section included the basics of budgeting and accounting that are central to running an acquisitions department, but which are often not taught in library degree programs. Students learned how budgets ensure fiscal responsibility and control and how budgets provide the means to monitor expenditures and plan for the future. The basics of fund accounting were discussed, including procedures related to fiscal year close. Various ways of constructing budgets were analyzed, such as breaking the budget into fixed and discretionary categories, subject-based budgets, and budgets created for specific formats. Additional detail was provided about sources of funding in the library budget, such as allocations, grants, and endowments. Other topics discussed in depth were invoices, credits, statements, prepayments, and deposit accounts.

The accounting section was introduced by a discussion of GAAP (Generally Accepted Accounting Principles). The focus of the rest of this section was on practices that would prepare the acquisitions department for an audit. The role of the auditor was discussed, as well as the purpose of an audit and what constitutes an audit trail. Students learned the kind of information that should be recorded for each item purchased by the library. The importance of segregating functions, such as preparing purchase orders and approving invoices, and of limiting access to acquisitions data and software, was emphasized. Finally, the role of external constituents in the library's financial relationships was discussed, and students were encouraged to establish friendly and respectful relationships with their accounts payable department, auditors, funding agencies, and others involved in the library's budget.

The final section was devoted to ethics in acquisitions. It featured guidelines for negotiations between libraries and vendors, including lists of topics that should be discussed and ones that should be avoided. After reading an article that delved into more detail on this topic, students were given a set of case studies, which they responded to in an online forum. Situations discussed included sharing a vendor's proposal with a competitor, and libraries promising a certain mix of orders from a vendor and not delivering on that agreement. The discussion forum for this topic was lively, and students appreciated the opportunity to discuss some of the situations acquisitions librarians may face.

One of the most useful parts of the course was the detailed bibliographies included at the end of each section, so the topics could be explored in more detail. The individual responses to student exercises by the instructors were also helpful and kept students engaged in the course by providing additional detail about topics and questions discussed. Although there was a lot of content to read, working professionals should not be particularly challenged to keep up with the pace of the course (two to five hours per week should be adequate). Serials topics, such as cancellation workflows and the kinds of services provided by serials vendors, were covered, so the course is relevant for serials professionals new to acquisitions. The course also balances the perspectives of librarians and vendors, encouraging both to be respectful and honest in their dealings with one another. The online delivery, knowledgeable instructors, and comprehensive look at the basics of acquisitions make this course a good choice for librarians and library staff taking on new duties in acquisitions, or individuals tasked with supervising acquisitions staff.

doi:10.1016/j.serrev.2010.05.002

2010 Electronic Resources & Libraries Conference

Kelly A. Smith and Laura Edwards

The 2010 Electronic Resources & Libraries (ER&L) Conference, held in Austin, TX, in early February could easily have adopted the tagline “It's Magic! The e-resource librarian as the wizard behind the curtain.” This idea struck a chord because so many users and library colleagues seem to have no idea exactly what e-resource librarians do. For them, e-resource librarians seem wizard-like because of the ability to effectively and creatively manage the protean world of e-resources. In fact, this theme came up in so many presentations that, by the second day of the conference, when anything remotely “magical” was mentioned, audience members would yell out, “It's Magic!” followed by much laughter.

On a more serious note, there were several major themes during this conference that reflected trends in libraries. The “thought cloud” on the ER&L Web site gives an interesting snapshot of some current trends that were discussed (Figure 1).[1]

In this conference report, the authors will focus on a few of these themes, including the following:

- Theme 1: The fundamental importance of the interoperability of metadata and its potential impact on discoverability;
- Theme 2: Changing workflows;

Figure 1. ER&L 2010 Thought Cloud.

- Theme 3: The need to improve library assessment tools and approaches;
- Theme 4: The effect of the economic downturn on libraries; and
- Theme 5: The changing role of libraries (and publishers) in the digital era.

Theme 1: Data and Discoverability

Many presentations dealt with new ways to use, present, and/or enhance library data. Ya Wang (electronic collections coordinator, San Francisco State University) discussed the quest to improve discoverability of library resources in her presentation "Images, Reviews, Tags and Recommendations: Do Enhanced Contents and User Contributed Contents Improve Access to Library Resources in an Academic Library?" Libraries are starting to take note of the popularity of services such as Amazon and Netflix, and vendors have started to develop similar services that libraries can implement in their catalogs and Web sites. Leonard Library has implemented library catalog add-ons Syndetic Solutions, Library-Thing for Libraries (LTFL), as well as the new article recommender tool from Ex Libris called bX. When a construction project at the library meant that the stacks were closed to users, they decided to implement Syndetic Solutions and LFTL to give their users the ability to learn more about library materials without needing to access the physical items. Syndetic Solutions offers book cover images, book reviews, summaries, and table of contents integrated into the catalog record. Images, summaries, and tables of contents were heavily used, while interest in book reviews was varied. LTFL offers tag browsing and a book recommendation feature. Wang noted the popularity of LTFL's similar books feature ("users who like this book also liked…") but was surprised at the low use of tag browsing, which was lower than subject heading searches. While they marketed Syndetic Solutions and LTFL, they quietly implemented bX in September 2009 and watched the usage grow without any promotion. Clearly their users like this service. By December 2009, it ranked third in the total number of click-throughs. They noticed that click-through statistics for their ILL service has dropped while usage of bX has risen. She speculated that since bX is presenting users with alternative articles that they can use immediately, users are choosing these recommended articles instead of articles that they have to request through ILL.

In her presentation "Recommendations and the Library," Nettie Lagace (bX product manager, Ex Libris) discussed the growing popularity of recommender services and the implications for libraries. Many consumer Web sites (such as Land's End, Amazon, and Netflix) now include recommendations for similar items