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Heather D'Amour
University of Calgary, damour@ucalgary.ca

Ada-Marie Atkins Nechka
University of Calgary, adamarie@ucalgary.ca

Gloria Dingwall
University of Calgary, gadingwa@ucalgary.ca

Umashanie Reddy
University of Calgary, ureddy@ucalgary.ca

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A NECESSITY: OUTSOURCING THE ISSUES OF PRINT SERIALS

Heather D'Amour (*damour@ucalgary.ca*) - Head, Technical Services and Digital Access, Collections and Technical Services, Libraries and Cultural Resources, University of Calgary

Ada-Marie Atkins Nechka (*adamarie@ucalgary.ca*) - Associate University Librarian for Collections and Technical Services, Libraries and Cultural Resources, University of Calgary

Gloria Dingwall (*gadingwa@ucalgary.ca*) - Manager, Technical Services, Collections and Technical Services, Libraries and Cultural Resources, University of Calgary

Umashanie Reddy (*ureddy@ucalgary.ca*) - Special Projects Librarian, Collections and Technical Services, Libraries and Cultural Resources, University of Calgary

Abstract

The University of Calgary Library is testing and implementing a serials consolidation service including the receipt, claiming, and physical processing of over 1,000 print serial titles with a major serial vendor. The decision to outsource serials processing was in response to the growing demands placed on acquisitions processes by the digital collection. This article provides an overview of the issues that necessitated the move to a serials consolidation service, services available, steps taken by a project team to implement the service, to deal with the challenges and evaluate outcomes and next steps.

Introduction and Context

The University of Calgary is a young and innovative university, one that has grown rapidly since 1966 to become a thriving research university in the top tier in Canada. With an enrolment of 28,000 students, the university offers programs in 17 faculties and supports 30 research institutes and centres. As a newly elected member of the Association of Research Libraries (ARL), the University of Calgary ranks within the top fifty institutions. The Library is part of a converged organizational structure known as Libraries and Cultural Resources (LCR) which includes the University of Calgary Archives and Special Collections, the University of Calgary Press and The Nickle Arts Museum. In 2007, a capital project to build a new library including a separate off-campus storage facility or High Density Library (HDL) was approved. Libraries and Cultural Resources is planning to move into this new building, the Taylor Family Digital Library, in the fall/winter of 2010/11, bringing together converged collections with an emphasis on digital resources. Older material including large sets of print serials will be transferred to the HDL. As such, collection development policies are currently focused upon the creation and purchase of digital resources although print materials are still being acquired. We have a growing need to focus the attention of technical services staff on dealing with the digital collections and assisting with the streamlining of print collection processes. Issues related to print serial subscriptions will be the focus of this paper.

In 2008, Collections and Technical Services (CTS), a multi-unit area of LCR responsible for acquisitions, cataloguing, metadata, collection assessment and development began a project to review organizational structure and re-engineer processes and work-flow to ensure that the new directions for the digital library were put in place and that more emphasis was placed on patron needs. A review of Rick Anderson's "Four Mantras for the Technical Services Librarian" (2007)

provided useful insight into workflow, standards and user demands while 2007 conference presentations, by R2 Consulting on best practices for technical workflow and on ways to create an environment supportive of change, provided the background and stimulus for the development of the Process Review project developed by the Head, Technical Services and Digital Access.

An important aspect of the Process Review was to analyze the processes related to the legacy print collections and to ensure that the most efficient methods were being utilized to acquire resources and make them available to our clients. In addition to the students, faculty and community borrowers who use the main University Library and four campus branches, Collections and Technical Services includes within our client base a local community college library and five resource centres known as the Health Information Network (HIN), for whom we provide collection development, acquisition and cataloguing support.

Following Process Review meetings with individual staff members in the Serial Acquisitions area, the AUL for Collections and Technical Services; the Head, Technical Services and Digital Access; and other members of the CTS Management Group (CTSMG) began to look at ways to deal with a number of issues, relating to print serials. Of prime concern to us were the following:

- the significant number of continuing print serials subscriptions resulting in considerable processing back-logs and service delays causing complaints from our internal clients who indicated that the materials were in the building but not yet received or accessible
- the long lists of titles “claimed” but never received creating added stress for staff working in Serial Acquisitions
- the high percentage of attempted claims resulting in a high volume of correspondence from publishers indicating that multiple issues had been mailed (yet never received)
- the high number of unresolved invoice problems with publishers resulting in budget concerns

These issues combined with decreased staffing levels due to cut-backs and the Library’s commitment to purchase digital and electronic resources dictated that change was required.

Process Review

What We Discovered:

As part of our Process Review and the one-on-one discussions we had with staff working in the Serial Acquisitions Unit, we discovered they were not able to keep up with the demands of managing print serials by checking material into the SirsiDynix Symphony Integrated Library System (ILS). With the emphasis on digital resources, the number of print subscription titles had decreased to 8,177; however, the actual number of individual issues received as part of these subscriptions totalled 57,140. Each of these issues required a fair amount of handling and processing in order to “receive them” and complete the “check- in” procedures.

In addition to the information collected as part of the Process Review, a timed study of serial “receiving functions” was conducted by the Special Projects Librarian working closely with staff

in Serial Acquisitions. These processes were in turn “costed-out” by the LCR Finance Unit in order to compare them with the costs of outsourcing similar functions. In reviewing the information collected and the results of the timed study, we concluded that 60% of staff time was spent on the procedures required to “receive” journals physically into the Library and to enter information in the ILS. Table 1 shows the nature of the material being received, the number of subscription titles in each category and the number of print issues received.

Table 1: Nature and Number of Print Serials Received

THE UNIVERSITY OF CALGARY 2008 PRINT SERIAL VENDORS	NO. of SUBSCRIPTION TITLES	NO. of ISSUES RECEIVED ANNUALLY
Major vendors	3,470	27,414
Local, Law, Government Docs., and free publications	2,685	13,718
Other vendors	2,022	16,008
<u>Current Print Totals</u>	<u>8,177</u>	<u>57,140</u>

The eight staff who carried out receiving were only able to process 30,784 issues annually. With more than 57,000 issues coming in, this resulted in a 26,000 item shortfall.

Decision Making Process:

A serials consolidation service offered by one of our serial vendors had always sounded appealing but now more than ever, it seemed like a positive initiative to investigate the outsourcing of serial acquisition functions in an effort to become more efficient and to provide better service. Working within a collaborative and open communication environment, the members of the CTSMG decided to develop a Request for Information (RFI) and send it to potential suppliers. The development of this RFI was informed by consulting similar documentation provided by the Library at the University of British Columbia and from documentation available on the web site of the U.S. National Library of Medicine. Working within tight timelines to meet deadlines for summer cancellation and renewal processes we requested replies to the RFI by June 2, 2008 from three vendors identified as potential suppliers of serials consolidation services: EBSCO, Harrassowitz and Swets. The vendor responses were evaluated later that summer by the CTSMG. With the approval of the Vice Provost and University Librarian, we began to implement this service with a select number of titles being moved, in conjunction with the fall subscription renewal processes, to a serials consolidation service. Given the poor budget situation, approval of the proposal required that CTS give up a part-time, vacant position within the Acquisitions Unit. While the availability of this funding,

some \$25,000, enabled us to move forward, the amount of the funding also restricted us in the number of titles that could be handled through this vendor-provided consolidation service. In addition, the vendor who previously handled most of our print subscriptions did not meet the requirements stipulated in the RFI; this meant that a large number of subscriptions had to be moved from our previous vendor to the supplier of the consolidation service. Had more funding been available, it is likely that the Library would have entered into service agreements for serials consolidation with both vendors. As part of this renewal and transfer process, we also cancelled journals and reviewed subscriptions which included electronic components.

A project overview with projected timelines and the implications for public services was presented to the senior management group within Libraries and Cultural Resources for review and final approval.

Project Management

Once CTS had approval to move forward, our first order of business was to form a Project Team to drive this initiative:

- The CTS Project Team included the Head, Technical Services and Digital Access, the Associate University Librarian for Collections and Technical Services, the Manager, Serial Acquisitions and a Special Projects Librarian. This Project Team reported on a regular basis to the CTS Management Group and relied upon the assistance of the Library's Information Technology Unit for systems issues and support.
- The vendor of choice provided assistance that ranged from top level managers who worked closely with us to set up the service, to sales representatives who provided training in the vendor system to the company's technology experts who worked closely with us to resolve technical issues and provide suggestions for equipment and workflow. The positive contributions from the vendor helped to move the project along smoothly.

In reviewing the literature relating to project management, Nicholas and Steyn confirmed that we were headed in the right direction with the formation of a project team as they noted that "Project management is bringing together individuals and groups to form a single cohesive team working toward a common goal. Perhaps more than any other human endeavour, project work is team work" (Nicholas and Steyn, 2008, p. xxxiii). Within Collections and Technical Services, clearly defined processes and responsibilities were jointly developed by members of the Project Team while clearly stated timelines drove the project forward. Commitment to daily in-person communication was integral for the completion of this project and we had good cooperation from internal team members as well as from the vendor members of the group.

Our common goal for this project was to develop a "shelf ready" journal process similar to our existing "shelf ready" book processes. We wanted to centralize physical journal processing with our serials vendor but this seemed challenging given that this type of service is more common outside North America and there were not many models for us to examine. All three vendors responded to our RFI with two indicating that they were able to meet our particular requirements. They supplied us with the names of five North American clients listing the Library

of Congress and the National Library of Medicine as references at an academic or research library level. We did follow up on these references with both institutions.

Serials Consolidation Services

The two vendors and the consolidation services we considered were EBSCO’s JETS (Journal Expediting and Technical Services) Service and Swets Information Services’ SwetsWise Consolidation Service. The following points provide a basic synopsis of processing offered through serials consolidation services:

1. *Consolidation service vendor becomes the “receiving” agent for a library’s print serials.*
2. *The vendor’s depot(s) becomes the “ship to” address for library subscriptions.*
3. *Publishers send the library subscriptions to the vendor’s depot(s) and the consolidation vendor receives the individual issues in to their system (SISAC barcodes record the detail). At the same time, the vendor completes any physical processing to issues (as specified in a service contract developed to meet needs of individual libraries).*
4. *The vendor ships to library as per pre-arranged schedule.*
5. *The vendor system tracks and automatically places any claims for missing issues with publisher.*

Basically, both EBSCO and Swets are able to provide similar types of serials processing as listed in Table 2.

Table 2: Serials Processing Available From Consolidation Service Providers

TYPICAL CONSOLIDATION PROCESSING	
SISAC Barcodes	Routing Slips
Security Strips	Sorting
Labels (Call #'s)	Unwrapping of Bundled items
Property Stamps	Reports
Packing Slips	Shipped Shelf Ready

Publications from the categories of publishers listed in Table 3 can be included as part of a consolidation service.

Table 3: Publication Categories Available From Consolidation Service Providers

PUBLICATIONS AVAILABLE	
Trade	Museum/Gallery
Scholarly	Small Press
University Press	Societies/Associations
Private Corporations	Law or Medical
Non-profit Organizations	Fulfillment Centres
Government Organizations	General Serials

The pricing models for the consolidation services available from EBSCO and Swets are very different so a straight one to one pricing comparison for the processing selected for the Library was not possible. Comparison of vendor prices with internal costs obtained through our time study did prove to be cost effective. In the end, our vendor selection process was influenced by the vendor's ability to work immediately with our ILS, the overall cost of the service given our available funding and the strength of the on-site presentation by the vendor's knowledgeable representatives.

Once the consolidation vendor was selected, the Project Team reviewed the 74 serial vendors and publishers involved in supplying the journals we had targeted for moving to this service. In several instances all the titles from a single vendor were transferred to the consolidation service. This transfer to a single vendor provided added advantages: consolidated invoices and a decreased number of individual vendors with whom we would be required to do business.

Checklist of Project Requirements:

- Select titles for consolidation service
- Compare titles with those provided by consolidation vendor, negotiate for transfer
- Transfer titles to consolidation vendor
- Contact publishers regarding address changes – while this could be done by the consolidation vendor; most publishers and vendors prefer to be contacted about subscription changes by the Library so handling this directly secures best results
- Make decisions and select the physical processing to be outsourced
- Develop new workflow processes – involve appropriate staff and trial service with small number of titles

The University of Calgary Library had targeted approximately 1,100 titles for transfer to the consolidation service with the goal to have those titles represent the largest number of individual issues possible – some 18,000 for the titles selected. We worked with our Library systems staff to create a list of print serial titles exported from our ILS which would include fields of data to assist in the decision making process. It was fairly easy to determine the titles to exclude. For example, the Serial Acquisitions Unit processes government documents so this large category

was excluded since these documents are obtained through deposit agreements with governmental bodies.

Title Exclusion Criteria Applied at the University of Calgary:

- Government documents (depository agreements in place)
- Daily titles (important to receive as quickly and directly as possible)
- Weekly titles (most were excluded due to importance)
- Local material (Western Canadian Publications – no sense sending these away for receipt elsewhere)
- Specific subjects – (for example, Law serials were being reviewed for cancellation)
- Format – (for example, microforms were excluded)
- Publisher direct requirements

By identifying broad categories of titles that need to be excluded, it was easier to review in more detail the lists of titles for possible consolidation. Ideally, the fields in the exported list should include the categories listed above but such information may not be recorded in the system for all titles so further review by staff is an important aspect of such a project.

The following criteria were also developed to assist us in selecting the titles which would be sent for consolidation. Two members of the Project Team sorted the system output by frequency of publication as the key criterion and examined those with the largest number of individual issues. The resulting list included publications from Canada, the United States and countries outside North America and utilized the list of titles available for consolidation provided by the vendor during the RFI process. The list of titles targeted for consolidation was reviewed by staff in Serial Acquisitions and by the CTS Managers Group. The Managers Group focused upon issues relating to overall collection development, availability of the resource in an electronic format, and access implications for the users as well as on-going relationships with publishers, vendors and partnerships with other institutions.

Title Inclusion Criteria Applied at the University of Calgary:

- Frequency of publication (most **critical** category in order to target the greatest number of issues being published)
- Vendor (once a critical mass was reached with a vendor, all titles were moved to the consolidation service if possible)
- Place of publication (in order of preference for moving to consolidation service: domestic, United States, outside North America)
- Print-plus-online publications (if title was online but print was retained, the print subscription was moved to the consolidation project list)

Eventually 1,135 titles were submitted to the vendor for consolidation processing. Of these titles, 365 subscriptions existed with the vendor previously but converted to the consolidation service. Approximately 770 serial titles (including 266 sourced from outside North America) were transferred from other vendors to the consolidation service.

Implementation Challenges and Solutions

➤ **Check-in process**

The check-in procedures depend upon existing policy. The University of Calgary Library continues to receive titles in our ILS. On receipt of issue, staff members scan the SISAC

barcode into the Library's ILS from the SISAC on the journal's back cover. The SISAC barcode contains exclusive information for a particular title including ISSN, year, volume, and issue number. As part of the process the vendor also started to send barcode reports where the barcode can be read from a packing slip report rather than individually from the issues. If check-in is no longer required this is a process that could be eliminated.

- **Barcodes (ink rubbed off when scanned with hand held wand readers utilized by staff)**
- **Scanners not reading barcodes**

Timely communication with the vendor was critical to resolving the challenges presented above. We worked with their IT analyst to find a solution to the barcode problems. The vendor supplied us with a heavy-duty "hands free" WASP® barcode scanner. This upgrade proved to be the best solution and more efficient overall. The Library's IT staff worked on our ILS system set up to enable check-in of the consolidated issues by scanning the SISAC barcode. Scanners needed to be correctly encoded to read code 39 with a maximum string length of 48 characters. The Library purchased additional hands free scanners to ensure efficiency.

➤ **Duplicate (grace) issues**

Eight months after implementing the consolidation service we continued to receive duplicates although the numbers were considerably reduced from those received during the first three months. This is similar to the problem identified many years ago by the National Library of Australia and it still continues as a major issue with consolidation services. The reason: publishers start sending two issues, one to the new service "ship to" address and one to the original "ship to" address. This means the Library receives duplicate copies of everything. Getting this change of address working with the publishers is a laborious and lengthy process and as noted earlier, one that needs to be initiated by the Library or at least communicated on official Library letterhead if sent by the consolidation service vendor.

➤ **Plastic packaged issues**

At start-up of the service, the plastic shipping bags had not been removed by the vendor.

Clarify with the vendor regarding the opening of packaged issues; we opted for greater removal of plastic enclosures than is typical with other libraries.

➤ **Unwanted new print titles were shipped**

Clarify with the vendor regarding the opening of packaged issues; extraneous material and unsolicited new or sample titles are not required at the University of Calgary.

➤ **Memberships, subscription includes**

We needed to ensure that these subscriptions were maintained as one order for our internal processes therefore clear instructions to the vendor were necessary.

➤ **Duplicate payments**

It is important to coordinate the transition to a serials consolidation service with the timing of the renewal process in order to avoid duplicate invoice/payment issues.

➤ **ISSN in SISAC barcode did not match ISSN in ILS**

Use of standard information and the ongoing updating of standards is imperative when outsourcing as vendor information and library information must be synchronized.

➤ **Call Number Labels**

When transitioning to a consolidation service, communication with the vendor is critical as is the establishment of common terminology such as what is meant by a “call number label”. We are still working on such call number labels to be placed on the front cover of each issue -- much of this is our responsibility as the Special Projects Librarian who led the day to day activity was seconded to liaison services for 6 months.

Our need for call number labels is due to the fact most of our journal material is filed by LC class number in the current periodical reading room and then interfiled in the stacks with the monograph collection.

An additional benefit of this project was our ability to develop standardized labels for use throughout the library system and with our external clients. Two customized formats were introduced: one for the main library and branches, the second for the Health Information Network Knowledge Centres.

The label specifications and sample call number labels for each scenario were sent to the vendor to assist them with the preparation of shelf ready call number labels.

➤ **Shipment of Issues**

We needed to ensure that we received timely and cost effective shipments. Various shipping and courier scenarios were prepared and sent to the vendor for costing. Despite concerns about these costs, the shipping fees have been reasonable.

We also consulted with our on-campus Shipping and Receiving Unit as all shipments are actually delivered to them and they make the final delivery to the Library. The most cost effective route was to have the vendor bill us directly for the courier service.

Lessons Learned

Relating to the transfer of serial subscriptions to serials consolidation service:

- important for consolidation vendor to notify publishers that library customer is moving a title to the serials consolidation service and to provide publishers with the account details and new “ship to” address for existing orders;
- instead of instructing pre-consolidation vendor to cancel a title that is moving to consolidation, use the instructions “DO NOT RENEW”;
- subscription vendor needs to inform publisher of the expiry dates on existing orders and ensure that publisher does not set up an entirely new order

- the transfer process should be done in conjunction with the Library’s annual subscription renewal.

Relating to system specifications and set up:

- SISAC barcodes must comply with ILS System standards and barcode scanners.

Relating to Project Management:

- given the importance of communication, the use of asynchronous collaboration tools such as Basecamp®, Google®talk, Google®Calendar and web-conferencing software provided the Project Team and the staff with a better and more convenient way to share information and ideas;
- collaborating with staff by involving them in a Process Review and review of outsourcing services created a positive environment with greater buy-in ultimately resulting in greater efficiency;
- having dedicated professional staff, such as a Special Projects librarian, to work closely with support staff was very effective in solving daily problems, keeping on schedule and encouraging the use of technology;
- given that the consolidation vendor provides title and renewal lists and invoices in MS® Excel format, it is important to provide training and tutoring for staff to encourage them to develop their skill level with such products; and,
- as staff in the Library worked with multiple lists in MS® Excel format, in order to avoid confusion, it is important to establish an organizational structure and file naming standard at the start of the project and to delete any outdated or superseded lists from shared files.

Positive Outcomes and Next Steps

Our Process Review in CTS combined with the Serials Consolidation Project forced us to make a paradigm shift re-thinking and re-working many functions. The move to a consolidation service has been a very positive learning experience as we were the first academic library in Canada to utilize such a service. We have become more efficient with our processing of serials and are able to deliver to our broad client base in a timely manner.

Table 4: Average Statistics Compiled During First Ten Months of Consolidation Service

AVERAGE STATISTICS FOR FIRST 10 MONTHS OF CONSOLIDATION SERVICE	
Titles Received Weekly	198
Claims Handled by Vendor	2,489 of 11,265 issues
Check-in Time per Issue	1-2 minutes generally/2-3 minutes for complex
Turn-around Time	Vendor to Library: 2-3 days; Library to stacks: 2 days

Prior to 2009, we had 8 staff involved with serials – now there are 5 staff; we have no backlogs and one staff member receives most of the titles via this project. If all details are in order, a consolidated title can be checked in within 2-3 minutes, making the receiving and check-in process more efficient. Table 4 summarizes statistics collected and analyzed during the first ten months of this project. The ten month period coincided with the presentation date for this information at the 2009 Charleston Conference and has been further substantiated by analysis of an additional two months of data collected prior to the submission deadline for this article.

The most significant outcome has been a staff willingness to consider change and to develop a greater ability to be adaptable, flexible, and share ideas. Staff acquired new skills by using MS® Excel and by attending vendor training workshops on the use of the vendor database. Team work and a sharing of technological skills is more prevalent. The CTS Management Group is planning to expand our serials consolidation in order to become even more efficient.

Following the lead of many libraries, we are looking at stopping the check-in process. This is still under investigation as it is not a popular decision although CTS Management Group anticipates that such check-in data will be less useful as we move items to the High Density Library (HDL) and rely upon a different process to retrieve paper journals. The purchase of more digital content will also make this information redundant over time.

The Library is looking at consolidating deposit collections of government publications and for efficient means to acquire and provide access to the publications of non-governmental organizations – this type of material still accounts for a significant in-take of paper issues received on a daily basis.

The CTS Management Group plans to examine the acquisitions and cataloguing issues surrounding standing orders. We have begun discussions with vendors to see if we can introduce an outsourcing process which will expedite the receipt and processing of these materials for both acquisitions and the cataloguing department (“shelf ready” standing orders).

The CTS Management Group plans to implement EDI invoicing by the beginning of next fiscal year (April 2010). EDI invoicing will ensure more efficient and timely processing and payment of serial invoices thereby reducing routine paperwork, manual keying of data and errors.

Staff members previously dedicated to the work in Serial Acquisitions are being assigned to assist with electronic resources, to work with the Electronic Resource Management System and to assist with HDL projects and other projects that will make our hidden resources more discoverable.

Increasingly, the CTS Management Group utilizes outsourcing services such as serials consolidation, communication tools such as Basecamp® and productivity tools such as MS® Excel to create more efficient processes, to improve communication and to support project management. The tools enable us to collaborate and integrate our ideas and resolve the challenges we face at any stage of a project.

Conclusion

Within Collections and Technical Services at the University of Calgary Library, a Process Review project brought to light a number of long-standing issues related to the processing of paper serials. These issues in Serial Acquisitions prompted the CTS Management Group to consider the outsourcing of serials processing. The Project Team worked collaboratively with

staff to set the goals and to develop the critical requirements for such a service resulting in staff buy-in and the positive implementation of a consolidation service that has improved efficiency and enhanced service delivery. Support from the consolidation vendor ensured that the project was implemented in a timely manner. A backlog of print serial issues, budget cuts and a need to focus on digital resources created the right environment for the outsourcing of print serial processing – to date, the implementation of serials consolidation has been very positive and well-received.

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