Workarounds for Post-cancellation Access Rights and Records in Electronic Resource Management Tools

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- 20,898 FTE (2017)
- Public, land grant university
- R1 Carnegie classification
- Campuses in Manhattan, KS, Salina, KS, and Olathe, KS
- ~$5.8 million annual budget for library acquisitions, mostly electronic
Post-cancellation Access Rights

• Located in the Termination section of a license
• Establishes a means of access for electronic resources acquired during a subscription period and in some cases will extend through prior vendor mergers (a combination of licenses)
• Medium may be:
  – physical (compact discs, hard drives),
  – hosted by the vendor’s online platform (sometimes incurring an annual hosting fee upon subscription termination),
  – or permission of the Library to digitally archive on a secure, local server
Metadata + Acquisitions Collaboration

Committee met regularly to discuss strategy with the Ex Libris Alma product, consisting of:

– Electronic Resources Librarian (license manager)
– Continuing Resources Librarian (subscription manager; serials cataloguer)
– Head of Metadata, Preservation and Digital Initiatives (certified in Alma; cataloguing manager)
– Electronic Resources Access Specialist (link resolution; discovery layer activation)
Problems Addressed

1. How to signify perpetual access portfolio (journal) management of inactive electronic collections within Alma
2. Patron discovery of perpetual access material
3. How to capture relevant licenses that name access rights despite circumstances of mergers or dissolved companies
4. Language discrepancies in early electronic resource acquisitions versus today’s licenses
1. How to signify perpetual access portfolio (journal) management of inactive electronic collections within Alma

- Relocate portfolios (journals) to a locally created e-collection named for perpetual access
- Consistent language notes field on each record signifying cancelation date and perpetual holdings period
- Link license record with perpetual access or digital archiving rights information
2. Patron discovery of perpetual access material

• Upon cancellation, vendors may send material on physical media (DVDs, hard drives, CDs)
  – Does your library have a procedure for future use/migration or legal multiuser situations?

• Facing an environment of cuts and consequences
  – Is your library in a position where it can’t pay an online vendor hosting fee for a previous large one-time purchase?

• Know the backend of your discovery system to be able to best use your tools at hand and plan for future migration possibilities with the data
3. How to capture relevant licenses that name access rights despite circumstances of mergers or dissolved companies

- Maintaining a long written record on preserved emails with vendors on backed up server
- Naming new ownership of access hosts through license addenda
- Keep those invoices and title lists! Some vendors lose track of what you’ve previously subscribed to with a merger
4. Language discrepancies in early electronic resource acquisitions versus today’s licenses

• Early licenses bare bones transactions
• Sections of license expanded with detail over time
• Progress in naming media for digital archiving and perpetual access rights language
• Applying what we’ve learned from the advantages and disadvantages of grey areas over time
Moving Forward

• Alma work for post-cancellation access coordinated among:
  – Electronic Resources Librarian to assure titles are documented and access terms
  – Continuing Resources Librarian to process cancellation and note holdings
  – Metadata personnel modify portfolio records access in discovery system
THANK YOU! QUESTIONS?

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