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## An Ongoing Treasure Hunt: One Library's Practical Experiences Documenting Post-Cancellation Perpetual Access

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# **An Ongoing Treasure Hunt: One Library's Practical Experiences Documenting Post-Cancellation Perpetual Access**

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## **Abstract**

Albertsons Library embarked on a practical effort this past year to document post-cancellation perpetual access for those electronic journal titles that had been or were part of large package purchases. Documenting entitled content was challenging and hampered by limits to accounting records maintained at the library and university; a change in the library's integrated library system (ILS); limited or incomplete access to third-party subscription agent order and payment records; and changes or the demise of consortia. Decisions were made to work with the known more recent electronic journal content purchased, and to work backwards from there. Procedures for creating standardized perpetual access documentation by title was devised for use in the ILS cataloging module as well as the library's electronic resource management system. By creating a method for documenting perpetual access, institutions are able to support claims for access purchased by the library, even as content shifts from one publisher to another.

**Keywords:** post-cancellation perpetual access, electronic serials management

## **Introduction**

While library literature has addressed the value of documenting perpetual access content for some time, articles about the specific mechanics of tracking electronic perpetual access have been few and far between. Additionally, skepticism has been prevalent in many libraries due to the cost, time, and labor required to create a substantial tracking method for post-cancellation perpetual access (referred to as PCA). What is known from the literature is the apparent lack of standardization for tracking perpetual access; each library that documents this information does so in a way that works for that institution. Boise State University's three-phase process for verifying and documenting perpetual access was created after a prolonged period of digging through old notes and combing through payment records and searching through old license agreements. Throughout this session, the presenters emphasized the importance of documenting perpetual access on an ongoing basis for each e-journal title purchased as a way to save staff effort and time in the future.

## **Perpetual Access Overview**

The need to track PCA stemmed from the significant shifts to primarily electronic serials over the last few years. As of 2017, only 4.75% of the serials budget represented print subscriptions. A large portion of the electronic serials subscriptions were originally part of Big Deal packages that have since been broken apart. In the meantime, print materials were either withdrawn from the collection given ongoing PCA online access or put in storage. After these packages were broken apart, publishers' communications concerning their own recordkeeping inadequacies complicated efforts to assure complete documentation.

Boise State University sees perpetual access as a double-edged sword. Glasser revealed through survey results that perpetual access requires a large amount of the staff's time preparing documentation that vendors require before access is granted.<sup>1</sup> Serials staff must work with vague license agreements, understand how perpetual access is offered, and track title changes that are often completed without notifying the institution. Additionally, there is an apparent lack of standardization in the field that requires librarians to reinvent the wheel. Bullock provided some practical insights to

track perpetual access and discussed the need to track perpetual access due to the constant changes in content provided by vendors.<sup>2</sup> Oparanozie discussed more specific methods of tracking perpetual access and covered topics such as records management and using bibliographic records to indicate perpetual access.<sup>3</sup>

### **Tracking Method**

At Boise State University, serials staff began tracking perpetual access for cancelled packages using Excel spreadsheets and the institution's integrated library system using a three-phase process.

Phase one consisted of verifying online access for known journal titles that were part of the specific Big Deal package that was broken apart in 2013. Using data pulled from an electronic resource management tool, Serials Solutions, each title's access point was checked to see if it was still active and the scope of access was documented. In the serials management tool, a new collection for journals with perpetual access was created and titles were added as necessary. This allows the serials staff to pull titles with perpetual access from a particular vendor with quick ease.

Phase two involved updating OCLC Online Computer Library Center, Inc. and bibliographic records for existing records, or creating new electronic records for titles that were entitled for perpetual access but were not documented previously. It was determined that the bibliographic record was the most reasonable location to document perpetual access as it allows simple migration from one system to the next, allows the institution to create identifiers, and is a location that is easily accessible by serials and collections staff. Additionally, tracking perpetual access through a bibliographic tool allows the institution to create multiple holdings records if access is provided through multiple avenues.

Phase three involved researching journal titles that predated the Big Deal packages. This involved combing through old staff notes from the early 2000s, reviewing license agreements for journal titles for which perpetual access was purchased, and digging through old consortium invoices and catalog records from a previous bibliographic tool.

### **Vendor Relations**

A large aspect of managing perpetual access is developing a relationship with vendors. In previous experiences, order and payment records older than seven years were discarded as per a university record retention policy. This resulted in increased challenges when documenting access rights to content purchased more than seven years ago. Furthermore, staff retirements and turnover can make critical knowledge and institutional memory disappear. Boise State was able to work with a vendor to upload older history files. Building this relationship increases the information available to libraries as they document access entitlements.

### **Discussion**

Following the presentation, the presenters had a discussion with the audience about other techniques they are using to document perpetual access for cancelled titles. The presenters answered questions concerning the tracking of Open Access titles that previously represented paid content, ways libraries can collaborate with vendors to ensure that payment records are easily accessible, and need for libraries to retain lists of 'entitlements' to assure ongoing access when content moves from platforms or publishers.

### **Conclusion**

Libraries have been managing perpetual access since the beginning of electronic serial subscriptions. However, very little has been shared on how to document perpetual access for permanent records. With many changes in academic publishing and private sector changes, the content that libraries subscribe to can change drastically. It's imperative that libraries document that for which they are entitled to ensure continued access for their users. As the presenters discovered during phase three, there were many journal titles that Boise State was entitled to for a certain number of years, but for one reason or another, access was not currently provided. Documenting perpetual access rights at the point of purchase creates a safety net for libraries to retain access to what they paid for. Furthermore, incorporating perpetual access tracking into serials management prevents frustration later down the road as staff try and remember previous actions and decisions, or comb through incomplete notes or purchasing documents.

The process the presenters suggested included updating holdings records each time a title moves from one publisher to another. Libraries should set a policy on how to approach PCA and focus on the highest electronic journals or Big Deal packages. Furthermore, this policy should include how to handle situations in which journal titles become Open Access publications. While titles in Open Access are ideal, Open Access status may reverse if the title is sold to a new vendor.

### Notes

1. Sarah Glasser, "Providing Perpetual Access: Results of a Survey," *Library Resources & Technical Services* 58, no. 3 (July 2014): 144–152, <https://journals.ala.org/index.php/lrts/article/view/5259/6389> (accessed May 10, 2018).
2. Chris Bullock, "Techniques for Tracking Perpetual Access," *The Serials Librarian* 68, no. 1–4 (May 2015): 290–298. doi:10.1080/0361526X.2015.1017711.
3. Teri Oparanozie, "Tracking E-Journal Perpetual Rights: A Library Case Study," *The Serials Librarian* 73, no. 3–4 (December 2017): 226–239. doi:10.1080/0361526X.2017.1383964.

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