

# NASIGuide: Cancellation Workflow

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Forms created by the  
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There comes a time when every library needs to review its collection. With the raising cost of serials and shrinking budgets, many libraries may have to make the choice of what serials titles to cancel. A Cancellation Policy, as part of the library's Collection Development Policy, can provide guidance for these decisions.

## What should the Cancellation Policy consist of?

### PRINT

- How often serials titles should be reviewed
- Who makes the decision that a cancellation project is necessary
- Who is involved in reviewing the request
- Who makes the final decision
- Cancellation criteria:
  - cost
  - available online
  - usage
  - availability via ILL
  - historical value
  - faculty publication
  - duplication

### Cancellation criteria

*Cost:* if the subscription cost is high, consider if the title is valuable to the collection.

*Available online:* if the library has print and online access, consider factors affecting the availability of the online version, such as the date range included and in library use versus remote access.

*Usage:* consider if this journal is often requested or is necessary for a certain area of study or scholarly publication.

*Availability via ILL:* consider if the library will be able to obtain copies of articles if needed.

*Historical value:* consider if the author may be regarded as an expert on certain subject matter.

*Faculty publication:* if written by faculty, do not consider for cancellation - all faculty publications are kept indefinitely.

*Duplication:* consider if several copies are really necessary; if highly requested, think about changing the location to Reserves.

### **Cancellation Procedures / Print Materials**

- Obtain a current subscription/standing order list from the major vendors
- Make suggestions on what titles to cancel based on established criteria
- Present suggestions to reviewing team
- Review comments and make final decision
- Decide if title should be withdrawn\* from the stacks and discarded or retained and labeled "No Longer Updated" (tape\*\*)
- Maintain a cancellation list

\**Withdraw* = Pull from shelves; delete bibliographic record and OCLC holdings; delete all records from catalog and integrated library system (ILS).

\*\**Tape* = Put "no longer updated" tape on volumes; put a public note in bibliographic record that the item is cancelled and no longer updated; put "no longer received" note in check-in record.

### **Print Materials**

#### **Cancellation Workflow - Withdrawal**

- Complete cancellation form
- Contact vendor - after receiving confirmation, note last issue to be received
- Delete order records from ILS
- Pull title(s) from stacks
- Remove records from catalog and delete OCLC holdings
- Add titles to cancellation list

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After each task is complete, the person responsible for completing the task should initial and date.

### CANCELLATION FORM - Withdraw

#### Cancellation Workflow - Taped

- Complete cancellation form
- Contact vendor - after receiving confirmation, note last issue to be received
- Put notes in check-in record - "No Longer Updated"
- Close order record in ILS
- Label titles in stacks
- Update record in catalog
- Add titles to cancellation list

After each task is complete, the person responsible for completing the task should initial and date.

### CANCELLATION FORM - Tape

#### Electronic Titles

The same steps are involved for electronic titles as for print, although some of the criteria will not apply.

An important additional factor to consider is the renewal date of electronic titles and subscriptions. If your library is considering canceling a title or titles, it is best to cancel before the renewal date. Some vendors do not issue refunds once payment is made.

#### Cancellation Workflow

- Complete cancellation form
- Contact vendor - receive confirmation
- Delete order records from ILS
- Remove records from catalog and electronic management systems and delete OCLC holdings
- Add titles to cancellation list

After each task is complete, the person responsible for completing the task should initial and date.

### CANCELLATION FORM- Electronic

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Page 3

Page 3



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