

Course Reserves & Media Dashboard

Two Departments, One Shared Dream

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Our Story Begins...

- User Services - manages the requests from Faculty for instructional resources, books and media
- Collection Management Services - manages the orders for faculty requested materials
- Staffing Changes and Information Sharing Challenges
- Communication Overload

Communication in a New Direction

Media Order Status for User Services

Fiscal Period Description

Title	Material Type	Receiving Status	Expected Receipt Date	Expected Activation Date	Receiving/Activation Note	Order Status	Cancellation Reason	Sent Date	PO Line Reference	Vendor Name
1948 : creation & catastrophe /	DVD	Yes	1/29/2023		PPR Course Reserves	Closed		1/30/2023	POL-68300	Collective Eye Inc
499 /	DVD	Yes	9/25/2022		Cat reserve	Closed		9/12/2022	POL-67152	Procurement Card
Agassi = The handmaiden /	DVD	Yes	6/22/2022		Kerry Glamsch	Closed		6/8/2022	POL-66871	Procurement Card
Aligarh /	DVD	Yes	6/13/2022		Sujatha Moni	Closed		6/8/2022	POL-66868	Procurement Card
All About Eve /	DVD	Yes	3/5/2023		Course Reserves	Closed		1/20/2023	POL-68220	Midwest Tape
Almost sunrise /	DVD	No	11/3/2022			Closed		9/23/2022	POL-67438	New Day Films
American winter /	DVD	Yes	10/20/2022		Course Reserves	Closed		9/6/2022	POL-67111	Midwest Tape
August: Osage County /	DVD	Yes	2/13/2023		Cat reserve	Closed		1/31/2023	POL-68304	Procurement Card
Bad reputation /	DVD	Yes	10/26/2022		Cat reserve	Closed		10/13/2022	POL-67504	Procurement Card
Behind the curve /	DVD	Yes	8/29/2022		Cat reserve	Closed		8/16/2022	POL-66936	Procurement Card
Behind the shield : the power & politics of the NFL /	DVD	Yes	11/20/2022			Closed		10/10/2022	POL-67489	Media Education Foundation
Cabaret /	DVD	Yes	8/29/2022		Cat reserve	Closed		8/16/2022	POI-66947	Procurement

Building Blocks...

- User Services requested a similar dashboard for Course Reserves Books
- Our physical books problem
- Can we get Course and Professor info with that?
 - Limitations of a Funds Expenditure Report
- If at first you don't succeed...



Order Coding for Course Reserves and Media Purchases

Physical Materials:

Alma Field	Print Book	Physical Media
Fund:	cr1	med1
Reporting code:	print	Audio visual
Secondary reporting code:	course reserves	course reserves
Rush box:	Tick the box	Tick the box
Receiving note:	Cat reserve; Receive without barcode (only IF ORDERING PBK)	Cat reserve; PPR (if applicable)
Interested User:	Course Reserves, User Services (206XXXXXXXXXX)	Course Reserves, User Services (206XXXXXXXXXX)
Notes tab:	Add note; Initials: cr/m	Add note; Initials: cr/m
Attachments:	N/A	ICT approval document &, if available, any licensing documentation
Item Record - Internal note 1:	Prof. name, course, semester, loan policy <i>add from POL in Ordered Items... box > Edit> Notes tab for all formats</i>	Prof. name, course, semester, loan policy <i>add from POL in Ordered Items... box > Edit> Notes tab for all formats</i>

Electronic/Streaming:

Alma Field	e-book	Streaming Media
Fund:	cr1	med1
Reporting code:	online	online
Secondary reporting code:	course reserves	course reserves
Interested User:	Course Reserves, User Services (206XXXXXXXXXX)	Course Reserves, User Services (206XXXXXXXXXX)
Notes tab:	Add note; Initials: cr/m	Add note; Initials: cr/m
Attachments:	N/A	ICT approval document &, if available, any licensing documentation
Portfolio - Internal Description:	Prof. name, course, semester <i>add from POL in Ordered Items... box > Edit> Notes tab for all formats</i>	Prof. name, course, semester <i>add from POL in Ordered Items... box > Edit> Notes tab for all formats</i>

**Out of many reports,
a dashboard is born.**

Course Reserve Purchases Media Purchases Streaming Media Collections Overdue Course Reserves

Electronic Book Purchases

Fiscal Year FY2023-24

Title	Course & Instructor Info	Access Model	MMS Id	ISBN	Vendor	PO Line #	Expected Activation	Portfolio Availability	PO Line Status
Foundations of bilingual education and bilingualism	Maggie Beddow EDUC 170 FA'23, DRM-Free	Unlimited Access (JA)	99258078183901671	9781788929912	GOBI	POL-89989	10/19/2023	Available	Closed
Assessing Young Children in Inclusive Settings : The Blended Practices Approach.	Huan-Ching (Tiina) Chang EDSP 210 FA'23	Unlimited Access (JA)	99258077383901671	9781881256016	GOBI	POL-89979	10/15/2023	Available	Sent
Interrupting racism : equity and social justice in school counseling	DRM-Free Maiko Xiong EDC 274 FA'23	Unlimited User (UU)	99258077383901671						
Stamped : racism, antiracism, and you	Angela Leslie EDUC 169 FA'23	Three users (3U)	99258077383901671						
Just practice : a social justice approach to	Katie Savin SWRK	Unlimited User (UU)	99258077383901671						

Physical Book Purchases

Fiscal Year FY2023-24

Title	Course & Instructor Info	Barcode	Perm. Location	Temp. Location	ISBN	MMS Id	Vendor	PO Line #	Order Date	Est. Receiving Date	Receiving Date	PO Line Status
Cultural psychology	Itzel Aceves-Azuara & Phillip Akutsu DPSYC 100 FA'23 24 hours	30600018454754	2 SOUTH	None	9780393644892	99257743984001671	ProCard	POL-70075	10/25/2023	11/8/2023	10/31/2023	Waiting for Invoice

Course Reserve Purchases Media Purchases Streaming Media Collections Overdue Course Reserves

Electronic Media Purchases

Fiscal Year FY2023-24

Title	Course & Instructor Info	Material Type	MMS Id	Vendor	Order Date	Expected Activation	PO Line #	Portfolio Availability	PO Line Status
The Story of mothers & daughters	Hall, Vicki WGS 120 FA'23	Streaming Video	99258078782001671	ProCard	10/30/2023	11/13/2023	POL-70096	Available	Waiting for Invoice
The mask you live in	1-year lease expires 10/30/2024 Tanaka, Teri PSYC 149 FA'23	Streaming Video	99258078961001671	Kanopy INC	10/30/2023	11/13/2023	POL-70095	Available	Recurring Renewal
CIVIL WAR, OR WHO DO WE THINK WE ARE	McLaughlin, Nancie EDUC 165 FA'23	Streaming Video	99258078780701671	ProCard	10/27/2023	10/27/2023	POL-70091	Available	Waiting for Invoice
The Quiet Girl.	1-year lease expires 10/20/2024. Glamsch, Kerry THEA 155 FA'23	Streaming Video	99258078982401671	Kanopy INC	10/20/2023	11/3/2023	POL-70095	Available	Recurring Renewal
Judy Chicago & the California girls	O'Brien, Elaine Art 116 FA'23	Streaming Video	99258078781901671	ProCard	10/18/2023	11/1/2023	POL-70040	Not Available	Sent
A river below	Kasic, Kathryn COMS 133 FA'23	Streaming Video	99258078782801671	ProCard	10/18/2023	10/30/2023	POL-70011	Available	Waiting for Invoice
El mar la mar	Kasic, Kathryn COMS 133 FA'23	None	99258078782701671	ProCard	10/18/2023	10/30/2023	POL-70012	Available	Waiting for Invoice
Chano Park	Darden, ...	Streaming Video	99258078782801671	ProCard	10/10/2023	10/10/2023		Available	Waiting for Invoice

Physical Media Purchases

Fiscal Year FY2023-24

Title	Course & Instructor Info	Location	Material Type	Barcode	ISBN	MMS Id	Vendor	PO Line #	Order Date	Est. Receiving Date	Receiving Date	PO Line Status
Sankofa	Boston, Martin ETHN 179 FA'23	1 NORTH Media	DVD	30600018651845	No ISBN	99258078962501671	ProCard	POL-89998	10/12/2023	10/26/2023	10/19/2023	Waiting for Invoice
Mama Africa	Boston, Martin ETHN 179 FA'23	1 NORTH Media	DVD	30600018651829	No ISBN	99258077763501671	ProCard	POL-89991	10/9/2023	10/23/2023	10/19/2023	Waiting for Invoice
The menu	St. Louis, Renee HRS 80 FA'23	1 NORTH Media	DVD	30600018651779	No ISBN	99258077763801671	ProCard	POL-99990	10/6/2023	10/20/2023	10/11/2023	Waiting for Invoice
Kinsey	Borg-Therpot, Sonia PUBH 134 FA'23	1 NORTH Media	DVD	30600018651837	9788309179968	99258077763901671	ProCard	POL-89985	10/5/2023	10/19/2023	10/18/2023	Waiting for Invoice
MicroCosmos : it's Jurassic Park in your own backyard	Kasic, Kathryn COMS 133 FA'23	1 NORTH Media	DVD	30600018651787	9780788850912	99249109710101671	ProCard	POL-89984	10/5/2023	10/19/2023	10/11/2023	Waiting for Invoice
The seagull	Glamsch, Kerry THEA 5 FA'23	1 NORTH Media	DVD	30600018651795	9788317348455	99258075292001671	ProCard	POL-89983	10/5/2023	11/13/2023	10/11/2023	Waiting for Invoice
Ever after : a Cinderella story	Anderson Taylor FASH 130 FA'23	1 NORTH Media	DVD	30600018651748	No ISBN	99258077763901671	ProCard	POL-89982	10/5/2023	10/23/2023	10/11/2023	Waiting for Invoice
The Lord of the rings.	Replacement DVD	1 NORTH Media	DVD	30600018651803	9780780638372	992346371	ProCard	POL-89981	10/5/2023	10/23/2023	10/11/2023	Waiting for Invoice
Soul power	Boston, Martin ETHN	1 NORTH Media	DVD	30600018651761	9781435974861	99258075292001671	ProCard	POL-89980	10/5/2023	10/23/2023	10/11/2023	Waiting for Invoice



Analysis Based on Another Analysis

The screenshot displays the 'Electronic Media Tracking (CR)' application interface. The main window has a blue header and a navigation menu with 'Criteria', 'Results', 'Prompts', and 'Advanced'. On the left, a 'Subject Area' tree shows 'E-Inventory' expanded to 'Portfolio'. The 'Selected Columns' section lists various fields like 'Bibliographic Details', 'Portfolio PO Line', and 'Portfolio'. The 'Filters' section shows a filter: 'PO Line Reference is equal to any PO Line Reference in Media Order Status for User Services'. An 'Edit Filter' dialog box is open, showing the configuration for this filter: Column: PO Line Reference, Operator: is based on results of another analysis, Saved Analysis: /Shared Folders/California State, Relationship: is equal to any, Use values in Column: PO Line Reference, and a 'Protect Filter' checkbox.

Electronic Media Tracking (CR)

Criteria Results Prompts Advanced

Subject Area... [Search] [Sort] [Filter]

E-Inventory

- Portfolio
- Portfolio Activation Date
- Portfolio Creation Date
- Portfolio Modification Da
- Portfolio Library Unit
- Portfolio License
- Portfolio PO Line
- Portfolio PO Line Approv
- Portfolio PO Line Creati
- Portfolio URL Informatio

Selected Columns

Bibliographic Details	Portfolio PO Line	Portfolio	Portfolio PO Line	Portfolio	Bibliographic Details	Portfoli	
Title	Vendor	Course & Instructor Info	PO Line Status	Material Type	Portfolio Availability	MMS Id	PO

Filters

PO Line Reference is equal to any PO Line Reference in Media Order Status for User Services

Edit Filter

Column: PO Line Reference *fx*

Operator: is based on results of another analysis

Saved Analysis: /Shared Folders/California State [Browse...](#)

Relationship: is equal to any

Use values in Column: PO Line Reference

Protect Filter

OK Cancel

Conditional Formatting

Title	Course & Instructor Info	Material Type	MMS Id	Vendor	Order Date	Expected Activation	PO Line #	Portfolio Availability	PO Line Status
The Story of mothers & daughters	Hall, Vicki WGS 120 FA'23	Streaming Video	99258078782001871	ProCard	10/30/2023	11/13/2023	POL-70096	Available	Waiting for Invoice
The mask you live in	1-year lease expires 10/30/2024 Tanaka, Teri PSYC 149	Streaming Video	99258078981001671	Kanopy INC	10/30/2023	11/13/2023	POL-70095	Available	Recurring Renewal
					10/27/2023	10/27/2023	POL-70091	Available	Waiting for Invoice
					10/20/2023	11/3/2023	POL-70065	Available	Recurring Renewal
					10/18/2023	11/1/2023	POL-70040	Not Available	Sent
					10/16/2023	10/30/2023	POL-70011	Available	Waiting for Invoice
					10/16/2023	10/30/2023	POL-70012	Available	Waiting for Invoice
					10/10/2023	10/24/2023	POL-69995	Available	Waiting for Invoice

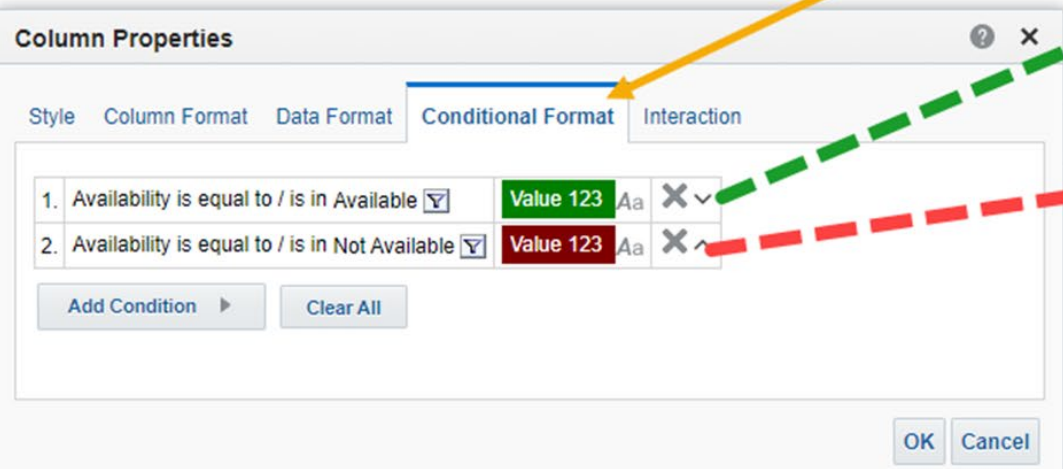
Column Properties

Style Column Format Data Format **Conditional Format** Interaction

1.	Availability is equal to / is in Available	Value 123	Aa	X
2.	Availability is equal to / is in Not Available	Value 123	Aa	X

Add Condition Clear All

OK Cancel

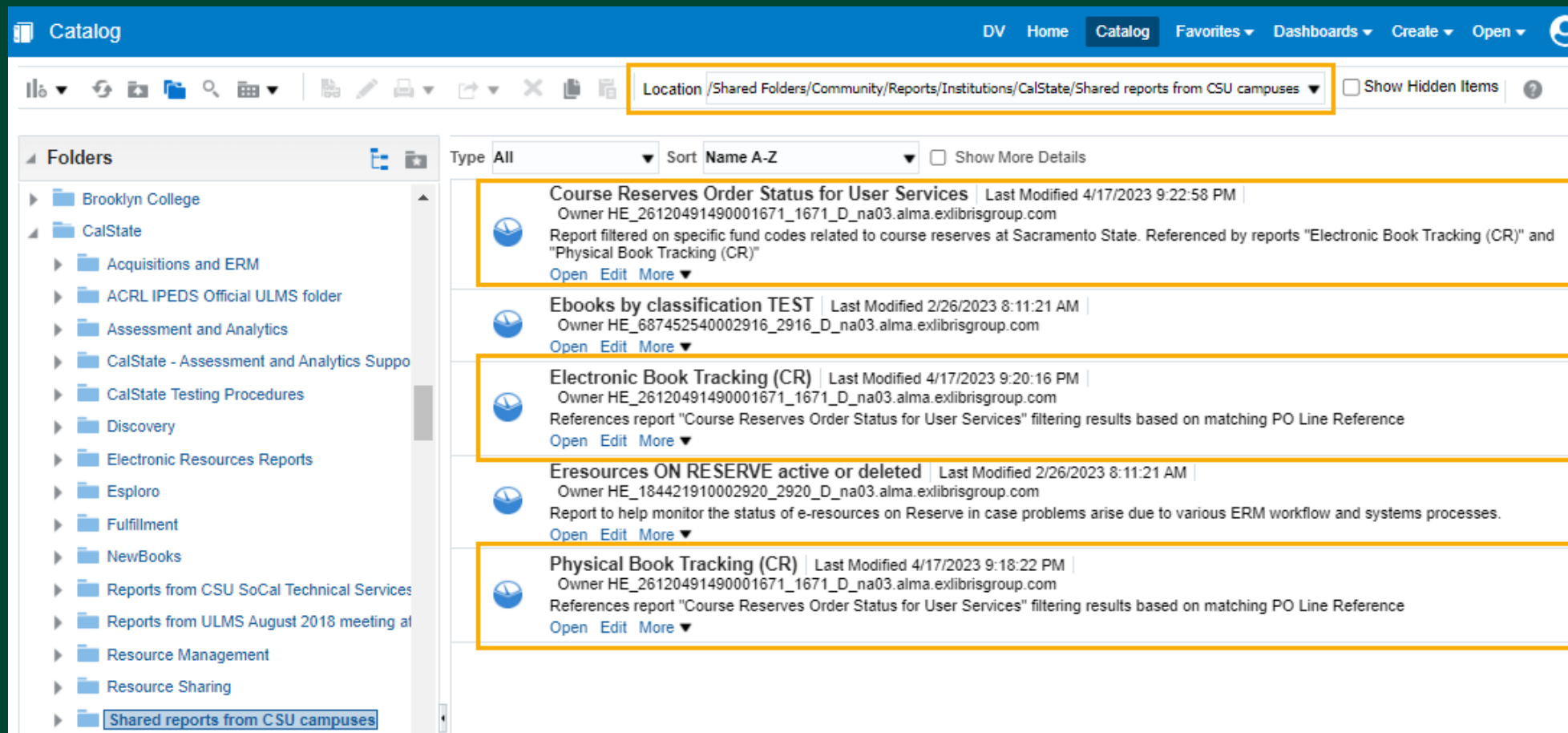


The screenshot shows the 'Column Properties' dialog box with the 'Conditional Format' tab selected. Two conditions are defined for the 'Portfolio Availability' column:

- Availability is equal to / is in Available (Value 123)
- Availability is equal to / is in Not Available (Value 123)






Arrows indicate the mapping: a green dashed arrow points from the 'Available' condition to the 'Available' cells in the table, and a red dashed arrow points from the 'Not Available' condition to the 'Not Available' cell in the table.

Sample Reports in CalState Shared Folders



The screenshot shows a web-based interface for a library catalog. At the top, there is a navigation bar with 'Catalog' selected, and other options like 'Home', 'Favorites', 'Dashboards', 'Create', and 'Open'. Below the navigation bar is a search and filter area with a 'Location' dropdown menu set to '/Shared Folders/Community/Reports/Institutions/CalState/Shared reports from CSU campuses'. A 'Show Hidden Items' checkbox is also present.

The main content area is divided into two columns. The left column, titled 'Folders', shows a tree view of the directory structure. The right column displays a list of reports with the following details:

Type	Sort	Show More Details
All <td>Name A-Z <td><input type="checkbox"/></td> </td>	Name A-Z <td><input type="checkbox"/></td>	<input type="checkbox"/>
	Course Reserves Order Status for User Services Last Modified 4/17/2023 9:22:58 PM Owner HE_26120491490001671_1671_D_na03.alma.exlibrisgroup.com Report filtered on specific fund codes related to course reserves at Sacramento State. Referenced by reports "Electronic Book Tracking (CR)" and "Physical Book Tracking (CR)" Open Edit More	<input type="checkbox"/>
	Ebooks by classification TEST Last Modified 2/26/2023 8:11:21 AM Owner HE_687452540002916_2916_D_na03.alma.exlibrisgroup.com Open Edit More	<input type="checkbox"/>
	Electronic Book Tracking (CR) Last Modified 4/17/2023 9:20:16 PM Owner HE_26120491490001671_1671_D_na03.alma.exlibrisgroup.com References report "Course Reserves Order Status for User Services" filtering results based on matching PO Line Reference Open Edit More	<input type="checkbox"/>
	Eresources ON RESERVE active or deleted Last Modified 2/26/2023 8:11:21 AM Owner HE_184421910002920_2920_D_na03.alma.exlibrisgroup.com Report to help monitor the status of e-resources on Reserve in case problems arise due to various ERM workflow and systems processes. Open Edit More	<input type="checkbox"/>
	Physical Book Tracking (CR) Last Modified 4/17/2023 9:18:22 PM Owner HE_26120491490001671_1671_D_na03.alma.exlibrisgroup.com References report "Course Reserves Order Status for User Services" filtering results based on matching PO Line Reference Open Edit More	<input type="checkbox"/>

The 'Folders' list on the left includes: Brooklyn College, CalState, Acquisitions and ERM, ACRL IPEDS Official ULMS folder, Assessment and Analytics, CalState - Assessment and Analytics Suppo, CalState Testing Procedures, Discovery, Electronic Resources Reports, Esporo, Fulfillment, NewBooks, Reports from CSU SoCal Technical Services, Reports from ULMS August 2018 meeting at, Resource Management, Resource Sharing, and Shared reports from CSU campuses.

Questions?

... and Thank You!