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A Myriad of Tributaries: A Case Study Exploring a Confluence of Streaming Media and Course Reserves

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This article will detail a case study of Concordia University's path from operating separate services of physical course reserves and media collections to pivoting towards the pandemic-prompted implementation of a new, large-scale, integrated streaming media course reserve service. While many libraries have offered streaming media and course reserve services during and prior to the pandemic's arrival, this article brings to light how institutions can quickly upscale and blend services when unexpected events – like pandemics – create needs for fast optimization.

Keywords: streaming; reserves; workflow; acquisitions; e-resources

Introduction

Since the start of the COVID-19 pandemic, library service offerings around the world have had to be quickly adapted to support the rapidly changing needs of library users (Askin, et al., 2021; Cox, Felix, & Raschke, 2021; Foxworth, Marien, & Barker, 2020; Ohler & Pitts, 2021; Thorton & Dunn, 2021). The library of Concordia University in Montreal, Canada was no different. Among the many pandemic-prompted adaptations that occurred at this institution was the reorientation of media material offerings to be used in courses. This article will review recent industry developments in media collections and course reserve services and highlight how Concordia's separate services of physical course reserves and media collections were quickly pivoted to support a new, large-scale, integrated streaming media course reserve service as a result of the COVID-19 pandemic

Literature Review

Course reserve services, also known as textbook programs, have been widely offered across North American academic libraries in recent decades (Diaz, 2017). Thoms & Schmidt (2021) qualify such services by stating that the "purpose of [a]… textbook

program is to support college affordability, to address student demand for library materials relevant to their coursework, and to support faculty instructional efforts" (p. 3). Concordia too has had similar impetuses for its course reserves service, and has historical findings to that of Thoms and Schmidt, who go on to note that "use of the library's print textbook program typically outpaces use of all other tangible collections in the library" (Duy, Huhn, & Kapa, 2017; Thoms & Schmidt, 2021, p. 3).

The COVID-19 pandemic exacerbated many of the inequities in society, including those which have historically caused institutions to offer course reserves programs. (Duy, Huhn, & Kapa, 2017; Bilodeau, Quesnel-Vallée, Beauregard, & Brault, 2021; Robinson, Jubenville, Renny, & Cairns, 2016; Whitley, 2021). Thus, many institutions have poured funds into converting these – and other physical offerings – into electronic service offerings in order to continue supporting their communities while accommodating the virtual and hybrid realities mandated by the pandemic (Black & Powelson, 2021; Cox, Felix, & Raschke, 2021; Mehta & Wang, 2020; Peet, 2021; Thoms & Schmidt, 2021). Indeed, recent research by Bullington, et. al. (2021) have found that three quarters of academic libraries across Canada and the United States have expanded online access to resources in response to the COVID-19 pandemic. Cox, Felix, & Raschke (2021) argue that this shift will not be short lived, as the pandemic has "resulted in more demand for online access [and that it is anticipated that] libraries will continue to invest heavily in ebooks and streaming media" in years to come (p. 363). It is argued that libraries alone in seeing a rapid shift to digital; Drabczyk and Oomen (2021) report that the creative and cultural industries as a whole are shifting as a result of this pandemic. This swift flip to digital resources has some, including Webb, et. al. (2021), positing that "the global pandemic [has] condensed a decade of digital transformation into [just] a few months" (p. 7).

However, while COVID-19 surely accelerated a shift to digital, many note that this shift has been a long time coming; libraries have for many years offered digital services, and studies show an increasing preference for streaming resources among users (Cardwell, 2021; Clark & Evans, 2015; Farrelly & Hutchinson, 2014; Horbal, 2018; Morris & Currie, 2016; Tanasse, 2021). Nevertheless, despite the vast majority of academic libraries offering some sort of streaming video service, not all libraries have fully replaced these services with their previous physical media offerings. (Cross, Fischer, & Rothermel, 2014; Farrelly & Hutchinson, 2014; Grombly, 2020; Horbal, 2018; VanUllen, 2018). Prior to the onset of the pandemic, uptake of streaming media in academic libraries, while present was often comparatively minimal when juxtaposed with physical video media uptake (e.g. DVD), especially among certain faculty and librarians (Cross, Fischer, & Rothermel, 2014; Gilchrist, Li, & Toepfner, 2021; Grombly, 2020; Reno, 2021; Thorton & Dunn, 2021; VanUllen, 2018). These preferences have understandably been forced to adapt since the pandemic's arrival.

The increase in streaming media requests in recent years – whether progressively over the past decade or swiftly as a result of the pandemic – is not without its challenges, many of which are tied to the fluctuating power dynamics within the market. The rise in e-commerce, whether for digital content or otherwise, has created a reality where consumers (i.e. library users) develop unrealistic timeline and access expectations (Vollero, Sardanelli, & Siano, 2021). This, in turn, has caused many libraries to prioritize immediate access of streaming materials at the expense of other factors, thereby favouring big-name siloed monopolies of ideas over more obscure independent content (Austin, Proctor, Ostos, & Tinik, 2021; Library Futures and Internet Archive, 2022; Drabczyk & Oomen, 2021; Fernandez, 2019; Vollero, Sardanelli, & Siano, 2021). Draczyk and Oomen (2021)state that in this more "virtual

world…there is growing concern…about the power wielded by these market-driven platforms. [As such,] lawmakers in different countries are considering which legal actions they will need to take to support pluriformity, openness, and privacy online" (p. 10). Cooper, as cited by Ohler and Pitts (2021), goes on to note that such power dynamics and industry pressures can lock libraries out of the equation all together, an issue which can "lead to gaps in coverage for patrons and increased reliance on alternative access channels" (p. 42). Others concur (Grove, 2021; Tanasse, 2021; VanUllen, 2018). In a summary of the American Library Association's Joint Digital Content Working Group's (ALA-JDWG) position paper on the digital lending ecosystem in libraries, it was noted that libraries face significant challenges with digital content, "License terms…are [often] problematic […limited] license options [can lead libraries into] jeopardizing their mission as stewards of cultural memory. […Furthermore,] increasing amounts of film and television content…are not available to libraries in any form as disc release becomes rarer." ([American Libraries], 2021, p. 12). Beyond these issues which can be found within a single country's legal environment, Ostos draws attention to challenges faced by those needing to collect across geographic boundaries, emphasizing that films foreign to a specific collecting location draw unique and significant challenges for libraries attempting to acquire streaming rights (Austin, Proctor, Ostos, & Tinik, 2021).

Lack of market diversity and difficulties of access rights are not the only significant issues faced by those in streaming media acquisitions as of late; many libraries have seen great increases in pricing combined with fluctuating licensing models (Austin, Proctor, Ostos, & Tinik, 2021; Cross, Fischer, & Rothermel, 2014; Grombly, 2020; Grove, 2021; Tanasse, 2021; VanUllen, 2018). While some may have found it to be financially feasible to support demand driven or package access in years

past, others have found the need to turn to more mediated approaches as requests have increased in order to prevent overspend (Austin, Proctor, Ostos, & Tinik, 2021; Grombly, 2020; Tanasse, 2021). Such surges in requests have even caused institutions to rethink fund allocations all together with several universities changing course from purchasing streaming media on historically monograph/subject funds to acquiring streaming video at a undesignated, emergency/pandemic, or university level funds (Austin, Proctor, Ostos, & Tinik, 2021; Grove, 2021; Thorton & Dunn, 2021). Furthermore, as the ALA-JDWG has found "price complicates access [when…] institutional licenses are often either unavailable or so cost-prohibitive as to make student access impossible" ([American Libraries], 2021, p. 12).

Numerous publications also outline factors that must be considered when libraries are looking to license streaming content, independent of aforementioned pain points, including the duration of a proposed license, the location where the content is to be hosted, and more (Austin, Proctor, Ostos, & Tinik, 2021; Cross, Fischer, & Rothermel, 2014; Tanasse, 2021; VanUllen, 2018). In order to manage these factors, and other aspects of multifaceted streaming media request workflows, many institutions funnel requests to acquisitions departments via liaison librarian triaging, specific media request email addresses, or online forms (Austin, Proctor, Ostos, & Tinik, 2021; Gilchrist, Li, & Toepfner, 2021; Thorton & Dunn, 2021). Once acquired, discoverability of streaming media content is also a key factor, with some institutions privileging platform-based discovery, while others also integrate films directly into their catalogues (Austin, Proctor, Ostos, & Tinik, 2021; Farrelly & Hutchinson, 2014; Grove, 2021; Horbal, 2018; Hutchison Surdi & Farrelly, 2016; Tanasse, 2021; Thorton & Dunn, 2021; VanUllen, 2018). Some institutions also proactively reach out to liaison librarians and/or

faculty members at the end of each semester with a list of expiring films in their content areas for renewal consideration (Austin, Proctor, Ostos, & Tinik, 2021).

This example of collaboration with those external to library suppliers of streaming media (e.g. media librarian, e-resource librarians, etc.) has been found to help facilitate support of such services, especially when nominal collaboration moves to fully integrated partnerships (Cox, Felix, & Raschke, 2021). Gu (2006) in particular, while citing the findings of Morgan (1998), highlights the important benefits that partnerships between libraries and other departments at academic institutions can bring to an institution's media service offering, stating that "the library [is] in a much stronger position to control its future and to grasp the opportunities that continuous change inevitably offers" (p. 388). Nevertheless, however beneficial such collaborations may be in the end, changes in workflows and procedures are known to cause anxieties, a reality that magnified throughout the lens of the pandemic (Mehta & Wang, 2020). Mehta and Wang (2020) bring this to light, noting that during such upheavals as pandemics, "collaboration …can face challenges [as…] past process and procedure for collaborative projects may no longer work with all the changes unexpectedly taking place" (p. 355). Indeed, studies have found that the COVID-19 pandemic created new, and inflamed existing, anxieties (Taylor & Asmundson, 2020). As such, when considering making changes to practices or procedures at such times of great flux, it is important to ensure that further anxieties associated with changes in the workplace are appropriately mitigated. Through their research in psychology and organizational theory, Baruch and Lambert (2007) have emphasized the importance of appropriate interventions to mitigate organizational anxieties, emphasizing the following three paths that workplaces can take to alleviate collective anxieties: consultancy; organizational development; and rethinking or reframing. These interventions when mapped onto libraries looking to

pivot services and procedures can prove especially beneficial in moments of great societal flux.

Background

Concordia University is a large, comprehensive university housed on two campuses in the city of Montreal, Quebec, Canada. (Duy, Huhn, & Kapa, 2017, p. 50). The three elements of the university core to this project – the Library's course reserve rooms, the Library's moving image collections, and the Faculty of Fine Arts' Visual Collections Repository –along with a fourth, external factor – the evolution of the streaming media industry as seen through the eyes of the Library – became the pivotal impetuses for the project outlined in this article.

Course Reserves

For over a decade, the Concordia University Library has purchased textbooks and other adopted course materials and housed these materials within course reserve rooms at each of its campuses. From these rooms, students can borrow materials on short term loan, 24 hours a day, via self-checkout machines (Concordia University Library, 2020; Duy, Huhn, & Kapa, 2017). The course reserve program was created through the inception of the Concordia Student Union's Library Services Fund which was established in 2010 via an agreement between the Student Union and University whereby undergraduate students contribute $1 per credit to the fund and – via a Library-Student Union committee – collectively establish parameters for which their funds can be used. The course reserves program is one of the focal areas where these funds are spent, amassing a collection of approximately 8,000 adopted resources (textbook or otherwise) at any given time (Concordia University Library, 2020; Duy, Huhn, & Kapa, 2017). Beyond the physical course reserves program, the library will, on

request from faculty members, make e-resources available via an electronic reserve platform which links to articles, book chapters, and whole e-books (Duy, Huhn, & Kapa, 2017).

Moving Image Collections

The library has also held for many years physical formats of moving images. At present, the collection houses the materials and the players for the viewing of VHS, Videodisc, U-Matic and DVDs. These materials exist in the regular (circulating) collection, special collections, and in the course reserves rooms, as requested by instructors (Concordia University Library, 2021).

Visual Collections Repository

While media collections and course reserve rooms are commonplace in many academic libraries across North America, there is uniqueness in the history of this institution with regards to media for members of the Faculty of Fine Arts, via the university service known as the Visual Collections Repository (VCR). The VCR is a facility of the Faculty of Fine Arts (FOFA) which was created in 2018 to combine the Faculty's Slide Library and Moving Image Collections. It also houses archival copies of faculty and student work, as well as celluloid films (Concordia University, n.d.). The Moving Image Collection – both as part of the current combined VCR and in its stand-alone preceding state – has been used by the FOFA for teaching and research since 1968 (Concordia University, n.d.). In its current form, this collection covers a variety of physical format types including VHS, laserdisc, Blu-ray & DVD (Concordia University, n.d.). However, it is noteworthy that this collection is not physically nor administratively part of the university library. And, due to a number of factors, including format preference, the longstanding history of the physical collection within the Faculty, and the complexity

and relative modernity of streaming, the collection does not include streaming media nor did (pre-pandemic) faculty in the Faculty of Fine Arts request streaming media as a service from the library. While many academic institutions across Canada have free-standing media collections housed within their respective Faculty of Fine Art, when streaming is offered via these institutions, it is done so via collaboration with the university libraries. This situation was nationally unique as there was no requests for (and therefore no established workflows for) streaming media to be used by the Faculty of Fine Arts.

Streaming Media

Beyond the physical media across the university, the library has been colleting streaming media upon request for many years. Beginning with streaming audio content, which was planned and piloted in 2008-2010, and continuing into streaming video content which was first licensed in 2014 (Doi, Mason, & Wiercinski, 2011; Mason & Wiercinski, 2009). The collection of streaming content began with locally-hosted materials on a password-protected library-dedicated server, and in 2016 the library collection welcomed the addition of vendor-hosted content. This first began through title-by-title licensing of films on the Kanopy platform and later evolved to include a myriad of purchasing models and vendors. In the first four years (2014-2018) of offering streaming video content at the library, less than 40 individual titles were licensed per year. Then, in 2019, requests jumped to 84 streaming media requests fulfilled in that year. Of note, about half of these requests were hosted on vendor-hosted servers (via Kanopy; see Figure 1) [insert Figure 1 here]. As the access to streaming grew at the library, so too did the workflow and staffing for this service grow through the years; when in its initial pilot stage, streaming media was done as one part of one

person's job and eight steps to complete; by 2019 at least seven distinct positions were involved and the process took nearly 40 steps, depending on the level of complexity.

Prelude to 2020

In addition to the above-mentioned four pivotal elements, three additional factors set the stage for the moments preceding the pandemic. First, in early 2019, prior to the global spread of COVID-19, a consultancy firm was hired to analyze the offerings of both the VCR and the library (with regards to media services) and propose possible future scenarios for collaboration. In parallel, the library began the implementation phase of a multi-year project that moved the institution from an individual integrated library system, to a networked, cloud-based, consortial library management system. Finally, the university's Instructional and Information Technology Services department was planning a summer 2020 roll out of a new license to Microsoft 365 (Concordia University, n.d.).

Method

On March 13, 2020, the Concordia University Library closed its doors – to staff and patrons, alike – as the university and the world dealt with the COVID-19 pandemic. That day, an initial stay-at-home order was issued by the provincial government mandating that no person could be on the university campus (Gouvernement du Québec, 2022). This was later compounded by additional measures as the months of the pandemic went on (Gouvernement du Québec, 2022). When the first orders were issued, winter courses were already mid-session and spring courses were soon to begin. Neither students nor employees of the university were allowed to access physical materials on campus which rendered the library's general collection, the course reserve rooms, and other collections located on university spaces, including the Visual Collections Repository, inaccessible to those in the middle of their studies.

As could be anticipated given the circumstances, faculty across the university quickly began looking to find new digitally hosted content to support the rapidly changing environments in which they were instructing. Thus, the interim emergency

decision was made that the library and VCR would collaborate to support streaming media requests from across the university, which included requests for the formerly physical media titles used by those in Fine Arts. In doing so, streaming media requests skyrocketed to unforeseen heights. [insert Figure 2 here] Figure 2 demonstrates that there were months in 2020 where more film requests were fulfilled than entire years past. Indeed, more films were licensed from January to October 2020 than the entire preceding history of individual streaming media titles licensed at the institution to that date. As more requests increased, it was also witnessed that there as a gross increase in films that the library was unable to license in streaming (see Figure 3) [insert Figure 3 here]. From a content perspective, it was understandable that if one had been watching a physical media format (VHS, DVD, etc.) in their class for many years – or had sourced physical media content from a location outside of the country – the difficulty to connect with the rights holder and establish an agreeable licensing contract on the turn of a dime, mid-pandemic was exponentially more challenging.

Because of this reality, it became important for the library to document how and why not all streaming requests were able to be fulfilled, and how each request varied in time for staff and librarians. For films on platforms with existing contracts between the vendor and the library, as well as an easily navigable interfaces for both staff and users, fulfilment could take a relatively short amount of time. However, for other more complex requests, the amount of time to research, document, license, and provide access grew rapidly (see Figure 4) [insert Figure 4 here].

Given increase in both volume and complexity of requests, as well as the ever-present realization that COVID-19 restrictions were not fully disappearing in the near future, it was decided mid-2020 that the library would need to reorient and refine the streaming media workflow in order to better manage the ongoing demand.

The first step in this reorientation was to reframe the library's Acquisitions unit to address the newly developed need. In late February 2020, a member of the payments group in the Acquisitions unit retired. However, when the pandemic arrived at the university less than a month later, this vacancy was left empty while all units responded to the emergency. By late summer, those managing in Collections Services realized that the need to fill this vacancy no longer sat in the payments group; rather, the ordering group (which included researching sources of materials to be acquired) needed more support. As such, the vacant position was re-written and filled to support the new need in the unit.

With the addition of the new position in the unit, and the collaboration with other units across the library and at the VCR, the attention then turned to the workflow itself. The newly implemented library management system facilitated the opportunity to make cloud-based holistic changes in processes that had previously been tied to local-hosted programs and resources. And practices that historically were so small-scale that they were easily managed via email now had to be fully documented and tracked to support large-scale collaboration.

Many resources were considered for such a tool, including external office and project management software as well as a variety of institutionally licensed products. In the end, the Head of Acquisitions and Serials at the library decided to leverage the benefits presented by the university's new Microsoft 365 license in order to create this tool, which was made via Excel. This tool which was dubbed the "Media Sheet" and contained all the steps needed in the multi-unit workflow for streaming media, from the point of request to the point of user access. The tool was housed on OneDrive, integrated into a new "Media Acquisitions Collaboration" group on Teams, and launched in December of 2020 [insert Figure 5 here].

While Figure 5 outlines the results of the landscape analysis used to decide on this tool, the most noteworthy benefits of this implementation, when compared to previous practice and other comparable resources on the market, were that Microsoft 365 was already rolled out by the university's information technology team. This meant that that the library was not responsible for the licensing, data compliance, etc., and that access to Teams and OneDrive was seamlessly connected to one's university emails account allowing for single sign on and access management. Additionally, as the tool was cloud-hosted, it did not get "locked" by a single user as was historically the case when more than one person tried to open the same file on a locally hosted drive). Furthermore, it can be accessed from computers both on-campus as well as at one's home office, a pivotal consideration during the pandemic. Best of all, and essential to the functioning of this project, was the new communication methods that developed; in order to track the history of each title and to alleviate back-and-forth emails, collaborators used the integrated "tagging" function (also known as "Modern Commenting" or "@mentions;" elaborated further below) embedded in the Excel file. This allowed each person or unit to be responsible for their own tasks and title level management of the workflow, as was the case with email-managed processes of the past [insert Figure 6 here; insert Figure 7 here].

Figure 6 provides a limited preview of how the Media Sheet is read, while Figure 7 lists all of the steps taken for a given film via the Media Sheet, from the moment of request, until the request is fulfilled. Looking first at Figure 6, one can see that each request has an auto-generated accession number that is applied in chronological order of submission. This control number allows for a reference point for the request as many films have the same or similar titles and as film licenses can be renewed or films can be cross listed for different professors or courses. The accession

number filed is also the place where comments are applied, allowing it to appear in alerts for the comments.

Comments, as mentioned above, are pivotal to the functioning of this tool, as the Modern Commenting function in Excel works in conjunction with the institution's email database. At the addition of each new @mention in the comments, an email message is sent to the person being mentioned thereby alerting them to look in the Media Sheet and citing the accession number of the film request in question, while preserving the recorded message in the comment within the sheet. Through the Modern Commenting functions of @mentions and assigning, it was possible to see the completion of the workflow of each film – from research and purchase, to loading onto the institutional server, cataloguing, and putting onto reserves.

Discussion

At the time of writing, nearly 1800 streaming media request have been researched since the initial onset of the pandemic less than two years ago, and the requests continue to come in. The reframing of the role in the Acquisitions unit, the collaborative efforts made via the use of the Media Sheet has kept things running quite smoothly. Beyond the title-by-title requests managed through this process, the library has also been subscribing to more streaming media packages than in years past, in order to support ongoing hybrid learning as the pandemic continues.

Indeed, the current academic year at Concordia University has been a hybrid one, as COVID-19 variants have forced instruction offsite on more than one occasion. As such, the data as it stands may not be indicative of the future needs of the post-pandemic faculty or students at this institution. Regardless of the institutional format preference, however the trend towards further collaboration has been solidified on the horizon. On December 22, 2021, it was announced to all library staff at Concordia that the FOFA and the Library recently agreed to a transfer of the nearly 30,000 physical film media

(DVD, VHS, Blu-ray) from the Visual Collections Repository (VCR) film collection to the Library. This transfer also allows a transfer of responsibility for collection development, physical processing, cataloguing, and the opportunity to circulate parts of the collection to the university in the years to come.

Conclusion

Though much has already changed over the past two years, the future of library streaming media changes can be predicted only in part. As outlined in the literature review of this article, there is a strong prediction that streaming, both in and out of libraries, will be here to stay. However, how that will manifest at academic institutions is still up for debate. Whether platforms will continue towards consolidation, research will move towards vendor-mediated aggregation marketed to academic libraries (i.e. Can I Stream It, Just Watch, Like Wise or Reel Good changing into the video version of GOBI or OASIS of the future, as previously alluded to by Morris and Currie (2016)), or access will move more controlled digital lending (as predicted by Lear (2021)), regardless of what path the market will take, library workers will have to be ready to adapt, collaborate, and innovate in order to continue supporting the media needs of their users.

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A Myriad of Tributaries: A Case Study Exploring a Confluence of Streaming Media and Course Reserves

Figures

Figure 1. Pre-pandemic year-by-year comparison of total streaming media requests vs. streaming media requests that are able to be fulfilled by Kanopy

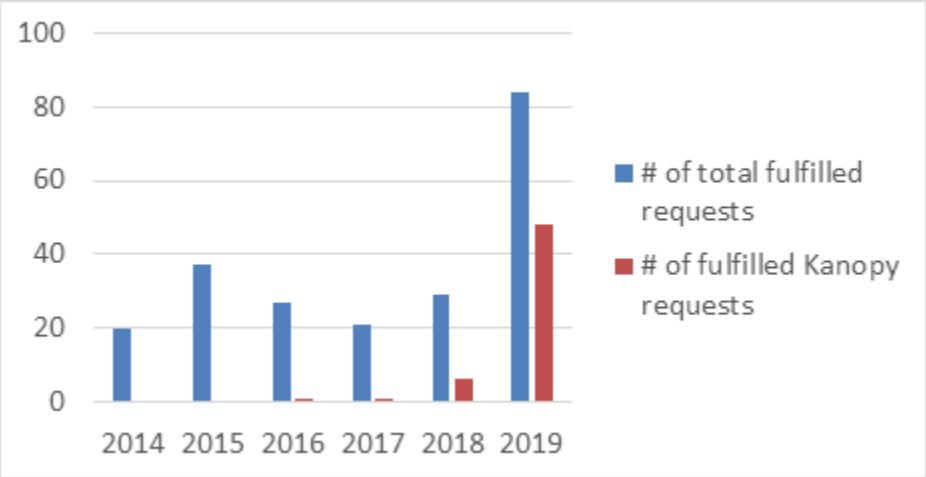

Figure 2. Number of requests fulfilled – pre-pandemic vs. first year of pandemic

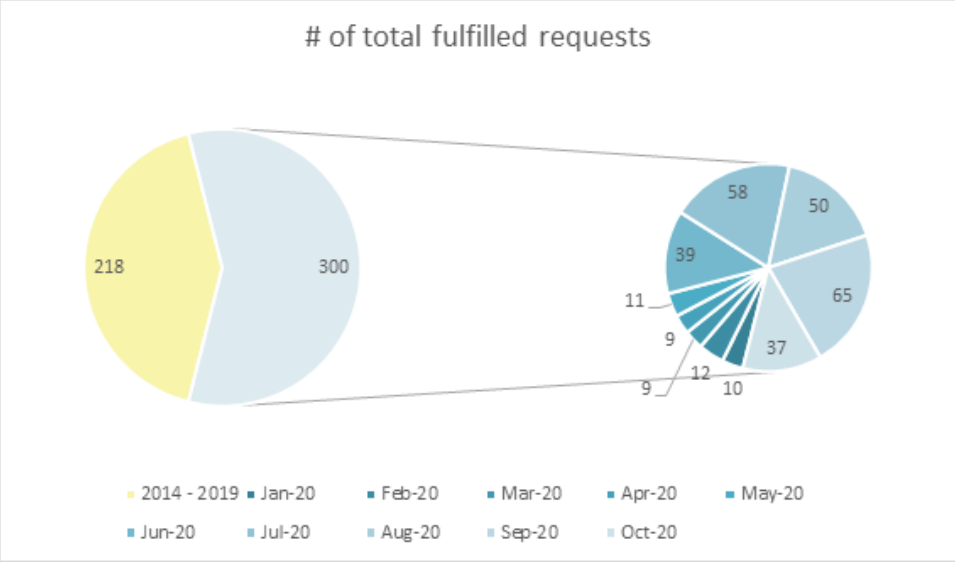

Figure 3. Year-by-year comparison of total streaming media requests vs. streaming media requests that are able to be fulfilled.

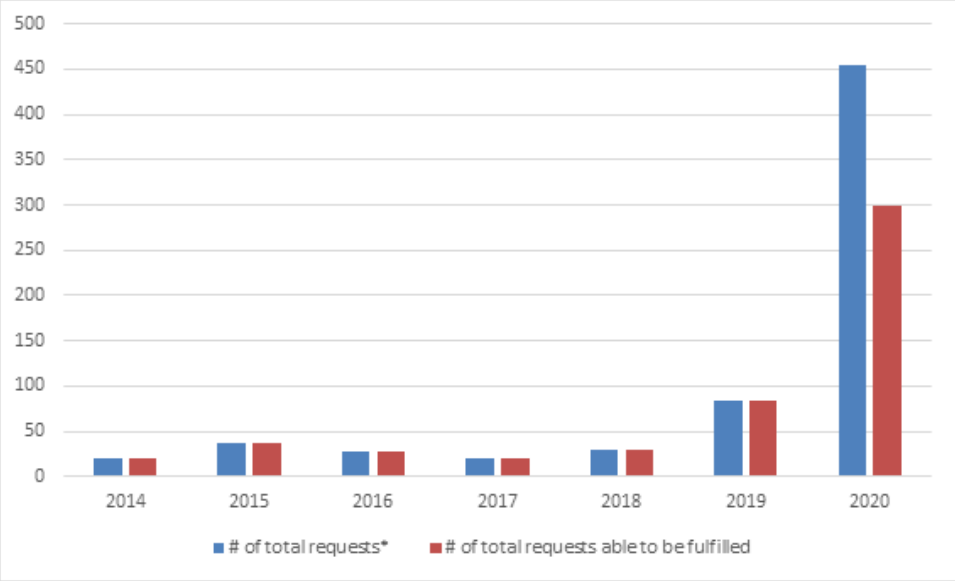

Figure 4. Comparison of time range to fulfil requests

	Approximate amount of time used to complete this task	
Task	Existing contract vendor platform	Unknown vendor/platform
Request received and read	1-5 minutes	1-5 minutes
Request clarified with requester (what is the actual film requested, what course is it for, etc.)	n/a	30 minutes per back/forth exchange
Request documented	5 minutes	5 minutes
Request investigated	n/a	1 hour minimum (up to 3 hours depending on complexity of film/requirement of clarification, etc.)
Investigation documented	n/a	5 minutes
Vendor contacted	n/a	10 minutes
Vendor contact proves fruitless, sent back to investigation step for new vendor to be found	n/a	30 minutes per back/forth exchange
Vendor replies to contact, clarification of request, terms or conditions proposed; information is read and recorded	n/a	15 minutes
Terms and conditions forwarded for review and institutional signature	n/a	5 minutes
Pricing forwarded for review	n/a	5 minutes
Negotiations required for pricing, terms and/or conditions; forwarded for negotiation	n/a	15 minutes
Negotiations take place	n/a	1 hour minimum (up to 6 hours depending on complexity of negotiation, etc.)
Create and "place" order record in library system	5-20 minutes	5-20 minutes
Create a vendor record in library system	n/a	5-20 minutes
Negotiations and signatures complete, vendor contacted with approved information	n/a	15 minutes
Vendor sends confirmation of purchase and invoice; information is read, recorded, and forwarded as required	n/a	15 minutes
Purchase documented	1-5 minutes	1-5 minutes
Receive access to the file for the film from vendor	1-5 minutes	1-5 minutes
Upload film file to local server and send link to appropriate individuals	n/a	15 minutes
Inform Cataloguing of link to film	1-5 minutes	1-5 minutes
Cataloguers catalogue film	5-15 minutes	5-15 minutes
Film is received and invoiced in library system and paid for with vendor	5-15 minutes	5-15 minutes
Cataloguer sends discovery link for film	1-5 minutes	1-5 minutes
Requester is informed of the access to film	5 minutes	5 minutes
Reserves is informed of access to film with affiliated course code information	1-5 minutes	1-5 minutes
Reserves put film on reserves	5-15 minutes	5-15 minutes
Total estimated time	**36 min to 1 hr 45 min per film**	**2hr 45 min – 13 hrs 45 min+ per film**

Figure 5. Landscape Analysis

	Locally-hosted (e.g. Excel on local machine)	External Online Office (e.g. GSuite)	External Project Management (e.g. Airtable, Trello)	Microsoft 365 Project Management (e.g. Planner, Tasks)	Microsoft 365 Office Online (e.g. Excel via OneDrive.)
Licensing / Purchasing	✔	X	X	✔	✔
Data Compliance Management	✔	X	X	✔	✔
Cost	✔	✔	X	✔	✔
Access Management	X	X	X	✔	✔
Multi-user capabilities	X	✔	✔	✔	✔
Auto-save / Backup functions	X	✔	✔	X	✔
Email alerts	X	X	X	✔	✔
Records Management / Data Archiving	✔	X	X	X	✔
Workflow flexibility and maintenance	✔	✔	X	X	✔
Scalability / Learning curve	✔	✔	X	X	✔

Note the intentional omission of Microsoft 365 Power tools, a low learning curve/level of entry with no required coding knowledge was a priority for knowledge continuity in this project.

Figure 6 : Basics of Media Sheet Structure

Tracking Field(s)	Tasks to be completed		
VID-REQ-0000012345	Person A	Person B	Person C
VID-REQ-0000012346	Person A	Person B	Person C
VID-REQ-0000012347	Person A	Person B	Person C

Figure 7: Extract of all steps outlined in the Media Sheet

Type of field Tracking field (auto generated), User submission (from request form), or Staff task	**Field description**
TRACKING FIELD	When is the last possible date to purchase? (Formula = screening date minus 21 days)
TRACKING FIELD	How many days until deadline? (Deadline to inform requester that film is unavailable) (Formula = count of days until date above; if overdue cell turns red)
TRACKING FIELD	TICKET NUMBER (Formula = Auto-filled accession number)
USER SUBMISSION	Film Title *required
USER SUBMISSION	Date of submission *required
USER SUBMISSION	Course code *required
USER SUBMISSION	Name of professor *required
USER SUBMISSION	Name of requestor (may be same as professor) *required
USER SUBMISSION	Concordia email address of requestor *required
USER SUBMISSION	Faculty of professor
USER SUBMISSION	Year of film release
USER SUBMISSION	Notable PEOPLE ...associated with the film (actor, director, etc.)
USER SUBMISSION	Notable GROUPS ...associated with the film (production house, etc.)
USER SUBMISSION	Link to the film on the internet
USER SUBMISSION	Are you aware of a library platform that hosts this film?
USER SUBMISSION	Any other information that can help us to acquire licensing rights to this film?
USER SUBMISSION	Screening date *required
USER SUBMISSION	Additional information you would like to provide
Acquisitions (Research)	Do we have it in streaming with a license that allows for viewing on “screening date?”
Acquisitions (Research)	Do we have it in "hard copy" (DVD, VHS, etc.)?
Acquisitions (Research)	Findings of streaming research
Acquisitions (Research)	If it is available, with which vendor?
Acquisitions (Research)	URL
Acquisitions (Purchase)	Confirm vendor
Acquisitions (Purchase)	Type of eProduct
Acquisitions (Purchase)	Streaming License Term
Acquisitions (Purchase)	License Expiry Date
Acquisitions (Purchase)	Price
Acquisitions (Purchase)	Currency
Acquisitions (Purchase)	Proposed fund code
Acquisitions (Purchase)	Order Status
Librarian (budget and pricing)	Price, Currency & Fund code has been approved
Acquisitions (Purchase)	ILS Order created (write in PO)
Acquisitions (Purchase)	Bill received & Paid (pcard) OR Sent for payment (invoice)
Acquisitions (Purchase)	License status
Acquisitions (Purchase)	License Notes / Comments
Acquisitions (Fulfilment)	OPTION 1: Vendor-hosted URL (enter URL & @ Cataloguing)
Acquisitions (Fulfilment)	OPTION 2: Medial-hosted (enter date that file sent to be uploaded & @ Medial)
Medial (local server upload)	FOR OPTION 2 ONLY: Medial-hosted (enter URL & @ Cataloguing)
Cataloguing	Cataloguing completed (enter Catalogue URL & @ Reserves)
Reserves	Once added to Reserves & Requester emailed select Yes in the box below & mark comments "Complete"
END OF PROCESS	