Tracking Student Requests in Excel

1. Student Requests

Use the “Student Requests” tab to keep track of which classes students have requested accommodations for. Each request should be given a unique identifier (Request #) that represents each unique request. This number will allow us to link data about the student and their enrolled courses and allow us to populate that information in different Excel sheets.

Default Headings

- Request #: Automatically generated unique identifier – do not include any duplicates.
- Request Date: Take note of when the student first put in their request.
- CRN: Course Registration Number
- SBJ: Subject
- CRS: Course
- SEC: Section
- CMPS: Campus
- Student’s Full Name: First and last name. Preferred name in quotes.
- Status (1) / Status (2):
  - No book info
  - Contacted professor
  - See main class info
  - Inclusive Access
  - Books required
  - Books not required
  - LMS Readings: Not Converting
  - LMS Readings: Converting
  - Class notes packet
Customization Notes

Most of the information that gets input into this sheet will be done manually. However, by default, the “Status (1)” and “Status (2)” columns have been created using the Data Validation tool and will restrict entry options. If you want to make changes to these available options, select the entire column (excluding the header cell), click on the “Data” tab, and then select “Data Validation.”

Edit the values listed under “Source” to fit your specific needs. Separate each option using a comma.

2. Work Orders

The “Work Orders” tab allows us to track student requests that require additional follow up. Typically, these will be the student requests where the value of “Status (1)” or “Status (2)” is listed as “Books required” or “LMS Readings: Converting” on the main Student Requests tab.

Default Headings

- Request #: Use a value from the “Student Requests” tab to refer to a specific student request. Inputting this value first will pull in data for the following fields:
  - SBJ: Subject. Will be auto-populated based off Request #.
  - CRS: Course. Will be auto-populated based off Request #.
  - SEC: Section. Will be auto-populated based off Request #.
  - CMPS: Campus. Will be auto-populated based off Request #.
- **Student’s Full Name:** Will be auto-populated based off Request #.

- **ISBN:** This acts as a unique identifier for a book. As long as the book is listed within the “Book Index” (described in detail later), you can input a single value and it will pull in data for the following fields:
  - Book Title
  - Author
  - Publisher

- **Status:**
  - Converting in-house
  - Requested from publisher
  - On Hold: Need book + syllabus
  - On Hold: Need proof of ownership
  - Completed

- **Receipt:** Indicate whether or not student has provided proof of ownership.

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**Customization Notes**

Several of the fields within this sheet use the [VLOOKUP function](https://www.example.com/vlookup) to gather data from other sheets. As the folks from Microsoft describe,

> In its simplest form, the VLOOKUP function says:

\[
=VLOOKUP(\text{Value you want to look up}, \text{range where you want to lookup the value}, \text{the column number in the range containing the return value}, \text{Exact Match or Approximate Match – indicated as 0/FALSE or 1/TRUE}).
\]

If you change the layout of the “Student Requests” or “Book index” sheets, you will probably need to adjust the VLOOKUP functions used in the “Work Orders” sheet as well.

For instance, if you only have one campus location and want to remove the CMPS header from your workbook altogether, you might start by deleting the entire column from the “Student Requests” tab. Notice how “Student’s Full Name” jumps from being in column H to column G? Because the VLOOKUP function uses column numbers to gather return the values, we will have to go in and adjust the VLOOKUP function in the “Work orders” tab so it calls upon the proper column number based off our changes.
3. Converting In-House

This sheet keeps track of the resources that are being converted in-house.

**Default Headings**

- **Book/Course:** Book title or course title. Keep consistent with value listed in “Book index.” If the name is not unique enough (i.e. Chemistry), include the ISBN or additional information that will help folks identify which resource you are referring to.
- **Assignment Title:** What needs to be converted
- **Due Date:** When it needs to be converted by
- **Format:** What format it needs to be converted into
- **Assigned to:** Who is working on it
- **Status:**
  - Completed
  - Needs to be reviewed

**Customization Notes**

This sheet uses conditional formatting to highlight overdue assignments and red and completed assignments in green. If you want to customize the colors, find “Conditional Formatting” under the “Home” tab. Then click on “Manage Rules...”
Click on the style you want to change and select “Edit Rule.” Then use the “Format” option to go in and adjust the shaded color or pattern.

To change the options available for the “Assigned to” column, select the entire column (excluding the header value), go to the “Data” tab, and select “Data Validation.”

Edit the values listed under “Source.”
4. Book + LMS Index

This sheet indexes all of the books held within your digital library and specifies which formats they are available in. You can also add links to their local or online source files to streamline the retrieval process.

Before adding a new book, search the index to see if you have the title on hand. When searching for LMS content

Default Headings

- ISBN-13
  - If you are converting LMS content, the ISBN will be replaced by a unique LMS ID. We chose to use: LMS-##. No matter what you decide to go with, you MUST ensure that these IDs remain unique and are never duplicated. Just like each ISBN refers to one book, each LMS ID should refer to one class.
- Book Title
  - If you are converting LMS content, the book title will be replaced by LMS-[class]
- Author
  - If you are converting LMS content, the Author will be replaced by the instructor’s name.
- Publisher
  - If you are converting LMS content, the Publisher will be replaced by the name of your LMS (i.e. D2L, Canvas, etc.)
- Edition
  - If you are converting LMS content, the edition will represent the semester (Fall, Spring, etc.)
- Year
- Accessible PDF
- Enhanced PDF
- EPUB
- Daisy/HTML
- Online
- Word
- Scanned Image
- Partially Edited
Customization Notes

This sheet can be modified to best suite your needs. However, keep in mind that the “Work Orders” sheet pulls information from the first four columns of this table, so if you modify anything from columns A-D, you will have to make adjustments to the VLOOKUP functions within the “Work Orders” sheet as well.