Please stand by for real-time captions.Hello, everyone, this is Melissa doing a final sound check and we will get started in about two minutes.

>> Hello everyone welcome to the FDLP change virtual discussion for August, 27 I am was carefully here today with Lisa Wessel and Corey Holder before we get started I will walk you through a few housekeeping reminders and then handed over to Lisa. If you have any questions you would like to as the presenter or if you have any technical issues, type them into the chat box located at the bottom right-hand corner of your screen. Lisa will and Corey will try to catch all of the questions as they come in and I will be here backing up in case something falls through the crack and gets forgotten and make sure all of your questions get to Lisa.

>> We are recording the session today and everyone who registered will get a link email to them along with the slides as soon as or sometime later this afternoon or tomorrow when the session is over. If you need to zoom in on the slides being shown you can click on the full screen bottom in the bottom left hand side of your screen. To exit full-screen mode just house back over the blue bar at the top of your screen so it expands and click on the return button to get back to that view.

>> With that I will hand the microphone over to Lisa who will take it from here. >> Lisa, you are up.

>> Thank you, somehow I could not unmute myself [Laughter] a little concerned there and thank you, Melissa. Hopefully that will be the only technical glitch we have today. We are or thank you for joining us for the virtual discussions. And Casey have not joined one of these before, Obama okay, [Indiscernible - low volume] bear with me just a little bit. And Casey have not come to one of these virtual discussions before, just a little bit of overview of what we're doing is we are planning the virtual discussions on a quarterly basis. The goal is to share status updates and also to seek input on development.

>> The web page for the -- on the development was launched back on May, I guess [Laughter]. The slightest from the last one which was in May and I forgot to put that in there and I thought [Indiscernible - low volume] the same. But that webpage will show plan development of the requirements backlog and initiative log and where you can join the discussion. We also add release notes from previous development cycles when that becomes available and not available yet because we are just heading into art second development cycle. >> Today's discussion we released a handout to get people talking , unfortunately the chairman is taking a little bit longer than we expected for the next round of development so we thought this was a good idea and instead of getting too far ahead of ourselves with the planet without was the time to get some input from all of you about whether there are things that or if there are services that we can be provided to help you transition or are there features that are missing in the tool that might be preventing you from adopting the tool in your Regents. >> If you can start your comments and questions in the chat box. And I will be reading from that, and a little bit awkward just because we try to make sure everyone is involved in the discussion by reading your chat responses. And we will respond to questions. If we missed something, we will follow-up after the session. And there should be some time at the end for additional comments. >> Topic one, implementation strategy for the process. GP was taking feedback on whether there are services that we could be providing, if you are a library -- if your library wants to adopt GPO exchange and has not adopted it, is there something that we could be doing to help you with the transition? Some things that we thought of not that might be awful -- [Indiscernible - low volume] that might be helpful to some people is hands on training for the region so everybody could learn how to use it and maybe's militating some [Indiscernible - static] to work with this division process after FDLP exchanges adopted maybe some targeted webinars on the steps that need to be taken to transition to using FDLP exchange so that [Indiscernible - static] or consultation on leave to tackle [Indiscernible - low volume] clock and of course maybe some things that you guys can take of that we have not even thought of. So kind of really like to hear if there is any sort of report that we can be providing to help you or help move the transition.

>> If you have any comments, if you can just type them into the chat box and I will read out comments as they come in. >> Giving you a minute to type. Just to give you some ideas, we have gone in a couple of regionals have had their regional meeting and we have gone in and provide hands-on training which gives people the opportunity not just to watch a demo but to actually use it and we have a training site that we can use for that. You can also use training site for testing within your own region if you need to do it or need to do that. Everyone who has gotten an account on the live site also has an account on the training site and the passwords will be different. So if you change it in one place usually helps if you change them in both places to keep them the same because if you're like me you might forget which one has which password. >> That is one think that we have been able to do. We are also pretty soon going to be going out to California to talk with them about how the word processors are working and it can also be useful for us and we could go in and sort of watcher processes and see if there are things that you might be doing something better you're not really fully aware that you're doing just because of the natural part of the process. Sometimes if we see those things we can say oh well maybe if we could at this kind of functionality maybe that would help, what do you think? And have some discussions that way.

>> Amy asked can you do hands-on training at the FPO P conference in October? We could do that. I think the problem in the past has been getting a room to do it in. But we could probably or be able to do that and I know there's a training room, if it is available here at GPO, people would be willing to sort of take a field trip away from the hotel to come over to GPO to do hands-on training here.

>> And also there will be or there were supposed to have an arid conference at the hotel where we could do consultations so we are going to have a sign-up sheet where we can work with you one-on-one with exchange one of us will be there doing that. So I am not sure what the layout is going to be with the hotel because this is a new thing we are doing but it is not just for exchange, but all sorts of consultations and questions, so we will be there doing some hands-on sort of things at that point as well.

>> Sorry to interrupt.
>> No, thank you for doing that I actually forgot we were doing that. I'm glad you did. That is one thing we can do. We did also -- obviously it is over now but we did offer hands-on training during ALA and AA and 00 here at GPO this summer because they both happen to be in DC this year.

>> And if your library is willing to host we can also come to you into a training there. If you have instruction room that we could do regional meeting in or something like that. >> Does anyone have any thoughts on any sort of consultation if there is anything or advising on processes or any of that kind of thing that you need from us? >> Okay, I will go on to the next topic and if anybody thinks of anything you can always chime in later or you can also contact us afterwards. Annex one next topic is if your region has not adopted and if there is radicular functionality that is missing that you need in order to be able to really use it effectively, we are interested in finding out what that is so we can make sure we are trying to or we can make sure that we are advertising other things first. Some things might be the ability to route offers [Indiscernible - low volume] and I see a typo there [Laughter] and I think particularly in region that have more than one library working at regional it is really important to be able to route based didn't.stem to make sure the right library gets a fair shot at the right see.areas. We have also had some request for additional tools for regional collaboration. One of the problems right now if you have two or more regionals, if one regional passes on it you are basically passing for both regionals. So you know of having some notification or something that you can better communicate with the other regional might be useful. >> And I guess it kind of also leads to improved workloads for collaboration and there is more than one regional in the region. And I know I believe there is just at least one regional that is not adopting yet because we cannot repay see.number because I really need to be able to use

that as a regional with multiple or region with multiple regions acting as collection -- regional collections.

>> So if there is anything like that that we have not thought of, we would like to share about it.

>> You can go ahead and type into the chat box. Michelle says the ability to upload an existing do not need list, previously we were told that we would have to rebuild that list as libraries offer on exchange. Okay, that actually might be something again we can incorporate the next on the next run of the development one of the things we have is do not need listen then maybe wait to be able to upload that. So we will keep that in mind for that development. So I'm glad you said jested that. >> And then you will also definitely be able to add things to it and then build your if you have an existing needs list that we can upload in there, that would be great but you also always would be able to get to if you do not have what you would be able to build as you are working through off something select. >> Lawrence is the ability for administrator accounts change rules after an account is created, possibly more granularity and rules of for example someone could have the ability to do with things allowed to be discarded with that meeting. Being administrator.

>> Okay. Do you see that as something that would be -- actually I am sort of seeing two possible things here one is maybe as administrator could be able to do or take on more than one role within the system but the other thing is that or I am seeing from your comment is that maybe someone else could or maybe there is a need for another level of access but in between user and administrator. We can certainly put either one of those. Amy says does everyone know you can have more than one administrator on an account? Ben says yes, he would like that. So would that be like being able to have or the administrator to have more than one role? Or was it for an additional level of access? Okay, Amy says I need more access and I was added as an administrator, needed more access. Yes, we can certainly do that. When use set up the system or when we set up the system you put every coordinator in there as administrator for their libraries but we also know that many libraries have someone who is not the ordinator who is actually handling most of the needs and offers so we can put that person in as an administrator so if the coordinator does not need to be in their we don't have to have a coordinator in there or we can set up multiple administrators. But we would recommend if you got someone who handles most of the needs, that needs an offer it's, that is not your coordinator, we would recommend they be added as administrator in the system. Ben says yes, I like that comment refers to the ability of a possibility of a role that fall somewhere between a user account and an admin account. Okay, we will take note of that. And then that makes a lot of sense. I think there is a lot of sort of middle ground that is not really covered, you know you might not want to give all access to someone but then they need more than what the user can do. >> Any other thoughts of additional functionality that you need in order to be able to successfully use the tool? Let's see. DD says she has been trying to make the sound work. Melissa, can you --

I am not sure. We will have someone see if they can help get the sound working for you.

>> I am on it. >> Melissa is on it.

>> Let's see. As far as the functionality, we do know that there are some cases where that ability to develop [Indiscernible - low volume] makes [Indiscernible - low volume] effectively and that kind of falls into the area of a major development and we are doing sort of a point of reminder development next go round which is why we are not doing it this time. That is certainly high on the list of things that we want to enhance. We also want to be able to add on additional functionality to support preservation stewards of that they can actually get, they can get stuff that goes up initially before it is going to cross the country to someone who might not be able a preservation Stewart.

We want to definitely help them so it will help them fill some gaps in of course were trying to help everybody fill gaps but particularly the preservation Stewart because they have things that they are missing that they are agreeing to keep and preserve.

>> Let's see, Myrna says another regional [Indiscernible - low volume] middle of a meeting project. Another library has a question might [Indiscernible - low volume] nice to be able to click on the library name and message and bring up their mailing address. Sounds good and that is actually something that we have in the next round of development. I am not sure if it is going to look exactly the way you describe it we have are really those things a little bit more -- more easily, one of the things that we have.
>> I think when we are developing, a little concerned the people might start billing things off unsolicited. Which is part of why we did not make it a little easier to find the admin's of it but it seems like the ability to find actresses more easily something that we need to add. That will definitely do that for you, you're not. >>
 Any other thoughts or additional functionality?
>> Cheryl asks priority for preservation stewards be first or certain period of time after and offers posted like first -- 5-10 days? Yes, that is basically how it would work. Except that right now it is written in the law that we have to offer first to the regional within the region and then to the selective within that same region. But I think the idea is that we would like to give reservation Stewart their shot at things. Maybe GPO and that same layer as well and so kind of be an additional timeframe between the other selective in your area and offering nationally.

>> And and GPO of course sometimes needs things to fill full [Indiscernible - low volume] preservation project and so on. That would be another case that we would like to be able to grab some of those things ourselves and digitize them and make them available to everybody in the program. >> The other thing with the preservation Stewart I guess is that we would have to when it gets to that preservation steward level we need to make sure that that preservation Stewart are getting action imperative for the things that the preservation steward is for and not just everything. So that sort of complicates the algorithm that you have to build to make that work and it is part of why it is a major development. >> Any other thoughts? Carol says she agrees.
>> Okay, I am going to move on and the next one is sort of focus in the first couple of topics on regions that have not
 adopted FDLP exchange and what we could do to help them if they want to adopted. How we can help them transition. Topic three we went to also take a look at anyone who has not already adopted it and if there are things that we could do to help make things work a little better for you, we are interested in hearing some of those things as well. And so we are interested in whether GPO can provide assistance in resolving issues such as providing ideally some workarounds are functionality may still need to be developed, reviewing your processes and offering suggestions for streamlining, maybe consultation on ways to tackle existing backlogs are targeted webinars on particular topics. And of course we are always open to other ideas that are not listed. Often that is something that you guys are very aware that we could do for you and might not have occurred to of so if there is anything like that we certainly would love to hear it. >> Shebang Amy says offers that of gone beyond 60 days, will there be any way to delete them someday? The concept was when we wanted to keep them in the system so that data would always be there
 -- in order to do statistical analysis on it so that maybe if we want to look at whether there are certain agencies that are being claimed and others are not, those kinds of things, what we do plan in the next round of development is to actually have that step archived, and right now you would be the only people, you and Weber would be the only users who can see stuff in your library that have expired from the system. But with the archiving, but we are planning is to have it so that it is default and to have that information archive and you can still see it if you want to, if you choose to click the show archived items or however that ends up working, but the idea is that that way you don't have to scroll through all of that stuff that is already expired when you go into the system. You can currently in case you're not aware you can currently use the filters by status to hide some of that stuff. But I believe this still just

clear themselves after you look at something. Because that is something we're trying to make that work a little bit better. Amy says she likes that idea. Great, we like hearing that.

>> That I miss?

>> It looks like Michelle had a question. >> Okay, in your experience as a process faster with exchange and move into exchange be a good way to tackle the backlog? >> Melissa,
 is working more closely with the library so I will as for heart thoughts. My feeling is it probably would be faster with exchange but maybe more of that information on that? >>
 Really depends on your situation. I think in general yes, it would be faster and it would make process a lot simpler. It might take a little bit of work before you start [Indiscernible - static] planning and that sort of thing and where are you from, Michelle?

>> I think she is from California.

>> California, because we are going to be helping with that in California soon. I do think it is going to be helpful for you to be able to do that. But yes, I think once you get the planning done, I think in most cases it will be a lot faster once you start using exchange.

>> Does that answer your question?

>> And at the just to chime in on that put the I think one of the potential hurdles of using exchange to tackle a backlog might depend on the format that you get your needs list in in your office listing currently. You know the word there is no way to upload a Word document. But as people are uploading, people are putting them in -- if they are putting them in spreadsheets, that is a template, that might be something that you could start transitioning by having them submit spreadsheets on the template form for temporary basis while you make the transition and then you get ready for them you can upload to the system. To sort of thinking off the top of my head and I do know how we will work that.

>> No, I agree -- I'm sorry.

>> Go ahead.

>> I was just going to say yes, I think little things like that it might take a little bit of time to start to do the transition but once it gets going, I think exchange will definitely be faster than the way most people do it as far as going through looking at every item in that sort of thing because the system will do a lot of the work for you.

>> Right. There is a question from Jared asking is are anyway to sort offers by the date of input or alphabetically
 by titles? Yes, there is. You can actually I believe the best way to do that and I am doing or speaking off the top of my head, so [Laughter], cannot give you step-by-step but in general I think if you go into the advanced search, you should be able to or you can put a lot of parameters in there but you can also if you have the results list, then click on the headers and even also if you're looking at or just browsing in the repository you can click on the headers in any of the headers that you see there, you can click the headers by clicking on them.

>> I think the weather my title is there and not sure input data [Indiscernible - low volume] but you can -- you can search by input date or by limit by input date and the advanced search. One thing to keep in mind though if it is an awkward phone from another region you are not necessarily going to see at the date it was input. So if I search today for things that are offered within the past week, if there are things that another opera regional or someone in another region has offered, I am not going to see those until they expire through their timeframe. Because if I go or if I keep going in every week and asking for things and for last week I will miss something that way. That is a little [Indiscernible - low volume] a little bit hard to! So never sure if I'm explaining it well but something to keep in mind anyway. That CME said we uploaded a few hundred offers from self template and a kick that 112 of them. I exported them to excel

and could not see any reason they did not go in. Is there a way when I export them to excel, does that or the information process problem show up in a font or a sheet? That would require additional development
. One thing that I do sometimes when I have been testing and something is not going in, if you can -- if you can take a -- if you can yes, if you have a spreadsheet of roughly 250 or less, if you should get that review pane, and then anything being kicked out should be something that did not go in. I think from reading your question you know that better but just in case anyone listening is not aware of that, if it is 250 or more it is going to go directly into the system but it kicks out anything that does not go in and I had a few kick outs when I was testing when I tried to upload a spreadsheet to 500 items in a kick that all 500. What I have done in that case if I cannot figure out what the issue is, what I often have done is to make a copy of the spreadsheet and cut out all of the first 10 for
 or the first 50 or something that will make it small enough to be able to upload it and get that review. And then usually if I see that review. That will highlight what it is that is going in. And that that allows me to fit yes, at that point I usually just cancel it and go back and spread -- fix the spreadsheet once I figure out what is wrong with it and that is something you can do in the meantime. Otherwise you know you can keep it or if you got a large spreadsheet and you can cut it into a, maybe spreadsheets 200 items or less, that should [Indiscernible - low volume] review pane which would make it a little easier to upload.
>> And also if you just plan out for the life and you figure it out and nothing is working send it to FDLP -- outreach at GPO.gov and we will take a look at it for you at help you figure it out.

>> One thing that we sometimes found out is that there seems to be some formatting in there that is not really visible to the eye and just gets tongues up on at yes, hung up on and in those cases if you save it at a [Indiscernible - low volume] instead of Excel spreadsheet and upload that sometimes that will work.

>> Betsy Ben says nothing happens with another library can format, paper in microfiche [Indiscernible - low volume] etc. be made more apparent or explicit or perhaps make formatting matching indicator an issue with current workflow currently in the middle of it microfiche project and every time [Indiscernible - low volume] we've had a message to the library, [Indiscernible - low volume] message to Larry to make sure [Indiscernible - low volume] when this prefer paper. That's a good comment. I think it is not a matching indicator written out just because -- is something turns out to be only in [Indiscernible - low volume] my go ahead and take the phish but yes, that's a good thought and I am kind of trying to think that through if there's a way that you could almost set up a default and not sure [Laughter] not sure [Indiscernible - low volume] maybe if you are library and you [Indiscernible - low volume] paper maybe make it maybe there's a way to checkmark and say this is only accepts paper or whatever. So I think there's some things there to think through and see if we could make it match a little bit better.
>> Amy says I have been having this didn't type directly into exchange but the Excel spreadsheet does better for us, good to know. >> That was one of the things in the development process to kind of we want to or not sure if people were initially uploading spreadsheets and then typing directly into exchange. Or if people continue to use Excel on a long-term basis. So it is good to hear or just to get your input on whether typing it in or using spreadsheet is better. >> Are there any other enhancements that people would think would be useful? And those could be process or functionality. You know anything that would help you use the system better.
>> I am not seeing any comments. Yes, nothing for [Laughter] services. And Lorna says biggest slowdown with this current does not [Indiscernible - low volume] but I heard in the last webinar
 that you were working on that feature. Yes, that is in the next round of development and that is one of the most frequently requested functionality [Laughter] methods that we got to that step, and it looks like we will probably need to take -- to for a few of the things that we were planning. And most notably I

think there seems to be some complications with or we were trying to build reporting in there and so we are just going to build the infrastructure this go-round and try to build the actual reporting tools for the next go-round and that seems like it is sort of complicated so I think it probably makes more sense to do that together so that will probably be deferred and then maybe things we need to drop off but I'm sure the market discarded is not going to be one of them because that is one thing that everybody, everybody, seems to want. >> Amy says I can the select marked items be discarded? I was not able to do it in my regional seems to be -- Amy, I think we will have to follow-up with you on that because that one sounds like maybe something is not working the way it is supposed to. We should be able to work things and discard it. Corey [Indiscernible - low volume] making note of it right now and we will reach out. May because [Indiscernible - low volume] I do that often enough myself. Let's see, anything else anyone would like to share about new services that would help you support using FDLP exchange ? For anything that we can do to help make the transition better or make it work better for your libraries?
>> Not seen any other comments, so I will give you another minute to type, if you are still thinking of something, I will wait. Ben says [Indiscernible - low volume] experiences regarding implementing exchange for my region. I would've benefited from some sort of simple checklist. Okay, that sounds good. I think we had blue checkless but I'm not sure and [Indiscernible - low volume] level of detail or may not have been easily findable. On her website.
>> Actually we are working on some things like that and I will add that to the list of materials.
>> Cool. Sounds good. >> That sounds great, thanks. Any other thoughts? And of course you can also submit things to ask GPO if you think of them
 after the session is over. If you just go at asked GPO and choose FDLP exchange category that will get you to the right place to make sure the right people see it. A right anything else anyone would like to add? We have no more comments, I guess we can end a little bit early. And thank you all for joining us. And of course as I said if you think of anything after this session you can always submit them to ask GPO using the FDLP exchange category and I will ask her it gets to the development team. Amy says see you at the next cover, thank you. [Event Concluded]