Please stand by for realtime captions.

>> That afternoon everyone. Welcome to the webinar at the FDLP EXchange website. With me here today are Lisa Russell and [indiscernible]. They have been instrumental in the FDLP EXchange. We will get started -- I will just walk you through a couple of housekeeping items. If you have any questions, feel free to use the chat box in the lower right-hand side of the screen. I will take track of all the questions and at the end I will relay those to Lisa and Melissa.

>> We will be recording the session. You should get an email tomorrow that has a link to the recording if you'd -- if you need that. We will also be sending out certificates of participation. If you have other folks in the room who are listening to this, just email us at [indiscernible] and give the name and email address of those that attended and then they will get certificates as well.

>> [low volume]

>> If you need to zoom on -- zoom and you can click on the full-screen button, if you want to ask that and there will be a blue bar and you can click on the return button and you will come back to this default view. With that I will to -- with that I will hand it over to Lisa Melissa.

>> Thank you Kelly. Today we are going to walk you through how to create spreadsheets. We wanted to go head into a training to help people understand what they need to do to create spreadsheets. I am going to share my desktop. First I wanted to start by showing you where to get the templates.

>> We have them available in two different places. We have them on the project webpage and then scroll down to the bottom where it says project and click that and then scroll down until you see FDLP EXchange. And you can get them ended couple different ways -- and you can get them in a couple different ways. Either one of those will take you to the page where they reside. I thought that was a link to the presentation. [laughter]. If you scroll down, right here we have downloads. We have that in different files if you use Excel or [indiscernible]. And then we have the same thing for office lists. Right now you probably want to get to [indiscernible]. We just made a few changes and we uploaded those on the project page. We are still waiting top lid in the application -- we are waiting on the application to upload those.

>> Let me open the Excel file to show you.

>> So if you go and you will see it does not have any data in it. Those are all the columns you need. The Excel version has the headers that are required in the columns are all bolded. The [indiscernible] file would not do the holding. When something is required, [indiscernible]. If you have multiple pieces you may want to put a note in that. Even though it is not required you can just leave it in there and leave it blank.

>> That is the offers template in Excel format. And then we also have samples. We will just give you a little bit more idea of what you should put in there. There are samples if you look down here. I am going to use -- the templates I will use today I will create the [indiscernible] so that I have something to show what it should look like. I will upload that.

>> You could see from the examples. We have hearing [low volume].

>> Something in Spanish I think that one has a URL. Something with an online version and then there is a cereal that is offered as individual issues and that is the next view. [low volume]

>> Here is a note for the multiple pieces. There are six actual issues that we are offering. There are five volumes -- there are five volumes that we are offering. I will save this.

>> I will show you where to find it. I'm going to save this and rename it webinar offers

>> You can obviously name it whatever you want just as long as you remember to move it and what you named it. Before I show you where to find the templates, I will finish this. Pretty much it is that -- just a second.

>> I am using the training site so I'm not messing with any live data. I am going to login as the selective user. So if you're a regional office, this is slightly different. You do not have the option to review offers. They don't have that. You have a little bit of different boxes down here. I am going to go to and put -- I am going to go into input. To get the offers you will click on offers and then if you scroll down you will see the template when it is updated. The project page 1 is more current at this moment. And then we have two examples below it. We only have the template in Excel right now.

>> You want to make sure you are getting the same template that you want to use. I'm going to go head and shoes this for the needs. They are the same -- I'm going to go ahead and choose this one for needs. They are the same on both.

>> Okay. I will come back to that. So I am going to go back to where we started. This is giving the sample data. I like to leave that in there initially so I have something to refer to. I want to make sure I take it out so I will highlight those lines. As you can see, it is selected that whole line. And then since I want all five of these instead of doing one at a time I will hold the bottom shift key and then I will click that. I have them all selected. I can right-click and pick this killer so they are all in yellow and that will help me remember to take them up. -- Take them out. If I need to adjust the column with so I can move around like this, you can also if you click here in this little square and select the whole thing then you can go over -- you put that cursor over there between the calm and that will expand it.

>> That can be a little bit complicated. If you have long titles you can end up with a really long title field that takes up the whole screen. Most cases that works pretty well. I'm going to go back over here and I will start putting in my first title. I am sure you all have better things to do then watch me type. I will copy and paste them. We have the first one that it is -- and that one is a monogram.

>> The classification type is because you can't put things in their -- you have to put in the classification. Put that in the number column.

>> That is a no. I don't have other things. I am using the notes so scroll over. The start is 2016. That was something we God in the secondary Kaaba he -- that was something we got in the secondary copy.

>> I do not have that here. Shipping date since I received this in 2016, this is something that if it was in the last five years the system will kick it up. Even though I have that they are I want to leave that blank. In order to leave that blank, if I put in 0101 000, that is what the system basically uses if you have a blank field. Even though it is a required field -- [laughter] one of the changes to the format that the shipping date is actually required. I must not have got the right template here. Anyways, it is required.

>> This is going to be paper. Reimbursement up to $10. And I will click yes. And then when I get to the notes field I am going to say that. The condition is -- you want to make sure you are working with the dictionary data. I would not want to put in fine condition. The system does not take that. It takes find. The data dictionary will tell you to put [indiscernible] or something like that. If you put in something not the right way, the system will not know what to do with that.

>> This doesn't have any conditions. I don't have an electronic access information. We will skip over to the notes field. This one -- this one is very small. It -- you will see that the text goes to the next column but I can expand that to show it but I also could go ahead and put information in the next all over just by making sure I had my cursor in the right place. In this case, I'm going to say [indiscernible].

>> I am using my laptop. I'm never very good on this laptop. Can pay postage up to $10. For the secondary copy I will put that in there. Now if I click here I can go click on this and I will expand it out to show all that.

>> Melissa pointed out to me that I am planing or typing this in the wrong line. [laughter] I'm going to finish typing it out though. Since I accidentally move my cursor to another style, if I just start typing it will take out what I already put in there. I will move the cursor up here until the end of the text that I am typing. I will put in the Ross of that I will put in the rest of that. [laughter]

>> I have this information in XL. I will highlight that and hold down the control key and hit C. I have the dashes going around. Then I will go to the field that I want it and I will hit enter. And then I can go back down and hit [indiscernible] to take it out of the other cell. That is one example.

>> The next one I am putting that in that column. The next one is [indiscernible] number. I am intentionally making an error so you can see what happens when there is an error in the list. I will go over. I actually have comments instead of a period. So that should be [low volume]. The system will catch it when I enter it. This one started in 2012. Know and they and the shipping date is 115 2012. If it is more than five years old, it will take it. And then you will be okay. This is also a paper. I'm going to put yes -- whoops. Yes for postage. And it is in fair condition. I'm going to put that in and scroll over. I want to put in the same note about being able to pay the postage. I will copy that down.

>> I am going to hit the space so it -- not space. So it takes that out. Now that I have the note that I want I can do control plus C. And then hold down the shift key and good on several roles and head enter and that fills it in. Now the next time I need to add that it is already there.

>> So this one you can see that the title ran over a couple columns. I can make sure I am in the right column if I hit tab.. I want to make sure and I'm just not going to put in here. I want to make sure it is in the right column. I will put that there and you can see as soon as I have done that make it is hidden behind column B. If I wanted to I can click up here and I can double-click on on the line between a and B and expand the column. I'm going to move it back. That is how you would do that if you need to. And then the number is [indiscernible]. It is then multiple pieces. 2009. Shipping data I am you saying 01 0100. [low volume]. The condition is good. And there are no notes on the condition. You can see that the postage up to $10 is already there. And I just have a couple more examples. So then you don't have to watch me type the whole thing. I want to show couple of examples. The next one and I will do serials as individual issues. The document number and the cereal that has multiple pieces. Since I am entering

each one individually, I will say no in this case. And then the first one is 2003. I have 2003 and 2004 and 2005. I will put in -- that is paper.

>> And then cook attention make an then good condition.

>> Now rather than typing that I will put my cursor here on the line number 11 and I will left click on that to select the whole thing and then I will do control plus C to copy that. I am going to hold the arrow down for two more and I will hit enter and it will film the exact same thing. I'm going to go first to see who thousand and four -- I'm going to go 1st to 2004. Let's go to the end of the number and then I need to change [indiscernible]. This one is actually not in good condition. It is fair condition. This one is fair condition torn cover. Otherwise good condition. And then 2005, I will change the number. And the publication date. It is in good condition. That is all three issues of that. The other one is entering this range and this is actually a best example. It is actually an education document.. Some of you will probably recognize that. You get the idea. This is counseling and school settings.

>> And then the number is [low volume]. I am going to go back up here to this line and put my cursor there. Since I am entering the range and multiple cases it will be us multiple pieces note. It is biannual. 2003 and 2005. It will give you a better idea of what I am offering. So in this case I will have [indiscernible] I will have that start date. I am going to put that in as the end dates. And this is a range. Each one will have its own shipping date and receipt date. I will use the 101 thing again.

>> This is paper. I will say yes for postage reimbursement. That is good. And that is all I need to do. So now we are going to close this but that one into the top and -- into the top one.

>> This is the one that I have been working on.

>> There are a variety of things. You can see that there are postage columns and copy one and copy two. There are a few things that I went in and added additional things. I put in serious titles. I just want to make sure I put the calm at the and. -- I put the column in at that time. When I was doing these I forgot -- I decided to wait until I was done. As you can see here, this one the title runs over but that is okay. It will still be over there. So if I click the bottom one and do control copy see and then if I do shift and arrow down I can get one at a time.

>> Usually, shift and control. And then hit the down arrow and it will take you to the bottom. Is taking me somewhere else. Make it is taking me somewhere else. That is not where I want to go.

>> 73 items in this list right now. I can split up the sample data. I will do the same thing with the postage date or requirement. I'm going to do control C and copy it and then I will put it down below again. I will hold the shift and arrow down key until I get to the one that I want. I'm going to shift.

>> I think that will take us down to the bottom of the list which is 74. Cas. Enter -- yes. Answer. I want to make sure I am taking that out of the top because it was sample data. I want to highlight that column. If I hold down the shift key and click on seven because that is the last line that I want to select. You can select one at time by doing the shift key. I will do that and right click on it. I want to delete these so I will just [indiscernible]. Now I will upload those into exchange. I click on the little floppy disk to save it. And then I'm going to go ahead and close this. I am going to go back to exchange. I've got the [Audio cutting in and out. Captioner can't hear what is being said.]

>> I have quick offers. And then I will choose my file I want to make sure I am going to the right place. This was something that was in my [indiscernible]. I will do the offer in short finish. We are just doing the list that I finish. And then I am going to click on import file. And then you should get a review pain -- review Pane.

>> It usually does not take this long. Everything is slow today. Are there any questions while we are waiting for this? I could probably take one while this is uploading. If you want to ask the question, just scroll over the blue bar and just click on the chat button and you can click on the chat button. Usually it only takes this long if [indiscernible].

>> Cheryl wants to know how she looks at a file after uploading? After it has been uploaded -- if it is less than at 250 items you will get a review Pane.

>> If it is already in the system, then you want to go into my EXchange menu and click offers. I don't know if you can see the arrow here. It is kind of a grade out area. -- Grade out area -- it is kind of a greyed out issue. She said she has tried this before and given an error message.

>> The longer list go in the system if you did not have that information -- but with a view Pane you can fix that. It is very tedious to edit and click I do not have a date and click save on each one. Rather than doing that, if you use 001 01 000 in that field it works for either one.

>> It does not matter if it is in order. We really want this in the system. There are bunch of different items. That is the shift and how this is working. We are really moving away from taking the list as a whole until a bunch of items which you are applying together. Really, it is the bulk load rather than the list mode. Someone who is looking at it can always search. Michelle wants to know what if it is a [indiscernible] with multiple volumes? I would put their as multiple pieces and then you can just put the same start and end date. Like with three volumes or whatever.

>> You can use that when creating it. I have never tried testing or uploading something with that. I hope that would not obsess -- that would not upset the system. Sometimes to make it more readable, it does take the bullet and headers with no problems but if you do thing -- for one thing, -- I know what the problem is. I don't know why this is uploading.

>> [laughter]. One of the things that you don't want to upload, as I just demonstrated is when I was creating this -- okay. That is not it. That is the shortlist. If I open on my list, this one. Okay. As I was working on this I waited know that I have to come to the reference S and come back later. I made some notes to make sure I remembered. [laughter] if you have something that you need later and you need to put in a coverage date for that information. You want to make sure you delete that before you upload it. It doesn't matter. You can see here that I didn't have the coversheet open. Is trying to upload the coversheet and it does not know what to do with that. Rather than doing that I will delete the coversheet. I will put my cursor over the cover tab and right click on that and I will say delete. In this case, I do want to delete this.

>> If I were doing this for real, I would want to make sure I had saved a copy of that. In this case, I don't need it. Now that I have done that I will save it. And hopefully, this time the upload will actually work.

>> It also does not like it if you merge columns. I would just try to stick to the form and fill it out as it is. You can try it and see if it works. If it does not, I would just expand. I have not have any problems. That

should be fine. I have three errors. I can also it -- I can also do the expandable thing up here. If something did not match -- sometimes it gets confused and matches that in that case, you could come over here and matches the shipping list date. I will put that back. I can also check this box that shows the entries with errors. And then traveling with your pets.

>> It has date received here and I can go ahead and take that out. If you don't have a date, -- that is the one I did the other day. [laughter]. Here on this one it has a comment and a [indiscernible] so I will edit the I man -- I will edit the item. I will save item. The numbers are not correct and you could do it here instead of the. -- I will edit that and change that. Now it says there are no errors. Since I don't have any errors, it can uncheck that. That is my list. So if I wanted to look through here and see anything I wanted to edit, I could do that here. If I need to add it like I just did, I can remove it. Unless there are no errors I can close this if I want to. And then I'm going to go ahead and click submit.

>> That should work. And it should not take as long as it was taking before. [laughter] I had to fix my mistakes. That is quickly uploaded to show you what happens with the laundry list. I'm going to upload another list and this is webinar offers. You can see that if you have the title here, imports. This is a laundry list. It will take a little bit laundered or -- it will take a little bit longer.

>> It will put everything directly and -- directly in. And it should be taking longer than the other one., Hopefully, this one is fine. [laughter] any questions while we are waiting? Charity wants and no -- charity wants to know if [indiscernible] is that a technical issue? If you could capture a screenshot and send it to us, that would help.

>> 40 of them did not. I can click to download a list. And then I can use this list to fix the errors. If you click on that, it will expand it out. I'm not sure what all the errors are. I am not sure if this is worth going through -- there is something else I want to show. [laughter] it will only take a second.

>> This is my [indiscernible] list. I wanted to make sure I have the right one. I am going to highlight the existing road just to make sure I don't accidentally upload those.

>> My library is collecting things from the Bureau of [indiscernible]. We want to make sure we are not missing stuff and it does not allow me to put in [indiscernible]. That is the Bureau number. This probably will not match with anybody because it does not exactly match with [indiscernible]. They will see that my library is looking for these. Maybe they will contact me and let me know they got it.

>> I'm just going to put an Bureau of animal industry. And I am just going to put that into [indiscernible]. I am going to put in a is a document number. It will take the first letter. The one above it I can put that in. I will not put in anything [indiscernible] since this is a need I am not trying to describe anything that I have. If I have put any in the entries it will kick it out. It is not a valid format. In that case you are trying to explain what you have in your hand.

>> Here I put in NE. Make your I put in any. -- Here I put in any.

>> Here I asked gently -- here I accidentally started typing something that I did not mean. And okay. I guess I did it and did not catch myself. I will put this on again. I am tabbing over. I don't have anything in there the internal notes are something for your own library there are not as many field here I don't have as much to describe. The annual reports from -- I forget who this is. Anyways, that is not really necessary the computer will display it. I'm looking for the 1940s and 1952 in 1953.

>> And this one will just have the start date. This is a case where I have three issues that I am missing. I want and paper. -- I want and paper. I can put in any. Also, if I wanted to -- if it was in good condition I can put that. It is not for disaster recovery. I am going to put in -- I'm going to copy and paste this one. I am putting a note that says we are [indiscernible]. And I will use control plus V to put in there. That is -- I am going to go back up -- just copy and control of the and then go up to the top sell and make sure my cursor is up here and then control P. Control of the -- control V. I will delete.

>> This just gives people a little bit more information about what I'm looking for. We are missing a few. So then I will -- the rest of this is actually a note for myself. [laughter]. I will leave it there for now. [laughter] just some examples. That was 1940 and then I am going to do control C and hold the shift down and then I will do 1962. I am going to control to put that back. 1963 was another one.

>> Okay. So you get the idea with that. There are fewer fields. He want to make sure you are using the right template. We are about out of time. I would just go ahead and upload this the same way just making sure I would go into [indiscernible] instead of offers. Do we have any other questions we have a question from Claudia. She tried this before and she got error messages. -- Yes, that should fix it.

>> If answering three articles, do you need to answer each one individually, you will get better matches but you don't have to. A lot of it really depends what the other person is putting in. Then it would match the full number. If you both put in the whole number for each individual one it will match the others.

>> Where is the data dictionary? Thank you for asking that. I did not point that out. I'm going back to the project page on FDLP.gov . Just at the top of the page. It is actually linked with the template. I should have pointed that out when we are there because I forgot. If you go down here there is the dictionary. I think you need to download it.

>> I think it says the shipping date -- I would like to announce that when we do a revision. This is where it would go. I am scrolling through the little bit. This shows you what it will take. And goes through all the different fields and tells you what they are.

>> [Event has exceeded scheduled time. Captioner must move on to next event. If there are any questions, please contact Vitac at 800-590-4197 or cc@vitac.com] Captioner must move on to next event. If there are any questions, please contact Vitac at 800-590-4197 or cc@vitac.com]

>> [Event concluded.]