FDLP eXchange Multi-Regional States

Tom Rohrig. Texas, Region I. Texas Tech University

Angela Kent. Texas, Region II. Texas State Library & Archives Commission

Agenda

1. Introduction. Multi-regional states

2. Strategy. Pre-FDLP eXchange: TX disposal process

3. Communication. Transitioning all TX selectives to FDLP eXchange

4. Training. Preparing TX selectives for FDLP eXchange.

5. Technical challenges. 1.5 years using FDLP eXchange.

6. Tips and Q & A

Multi-Regional states

- Several states have more than one regional

- Sometimes official, sometimes by agreement

- Regionals determine how FDLP eXchange is used in the state

- No "best" way to incorporate eXchange into discard process

TX-FED: summary

- Traditional multi-regional
- [number of FDLP TX selectives]
- Disposal process pre-FDLP eXchange
  - https://wayback.archive-it.org/414/20180305070826/https://www.tsl.texas.gov/ref/fedinfo/stateplan.html#appd
  - https://wayback.archive-it.org/414/20170907071635/https://www.tsl.texas.gov/ref/fdlp/index.html

Disposal instructions pre-FDLP eXchange

Appendix D. Disposal Instructions

I. Documents Received through the Depository Distribution Program

1. Depository libraries wishing to dispose of any publications received as part of the depository program and retained for at least five years must ask permission from their Regional Depository Library by preparing a disposal list. The list will be reviewed and posted to the Texas State Library and Archives Commission Web site for review by Texas federal depository libraries. All publications that remain unclaimed after a specified date may be thrown away.
2. Your Regional Depository Library will notify you if certain publications should be retained for a longer period.
3. Depository documents in hard copy for which microfiche has been substituted must also be listed.
4. Microfiche discards
    1. Selective depositories may discard microfiche copies of depository documents after they have been retained for 5 years without offering them on a disposal list. This provision reflects the "Cornwell Method" as approved by GPO for the handling of microfiche discards.
    2. Libraries discarding large runs or sets of microfiche documents must receive permission from their Regional Depository Library before discarding. The Regional may reserve the right to require the selective to prepare a disposal lists for large runs or sets of microfiche.
5. Items to be discarded may not be sold unless the proceeds are forwarded to GPO.
6. See GPO Instructions for additional guidelines.

Formatting Disposal Lists

Text should be formatted for an 80 character line and must be saved in an ascii format.

Suggested column placement, arrangement and information for lists:

- Name of Institution
- List #
- Format of items listed
- Address
- Telephone Number
- Fax Number
- Contact person
- Email address for above
- Special notes; e.g., postage requested, mailing labels, etc.

Class #	Title	Year
(begin at 1)	(begin at 21)	(begin at 60)

How Disposal Dates Are Assigned

Disposal dates are assigned to lists as they are submitted to the Regional Depository. These tell selectives when the listed materials may be discarded from their collections. The date is officially conveyed to the libraries in a notification letter.

Since December 1, 1994, disposal dates have been assigned based on date of receipt. Lists received by the 15th of the month are assigned a disposal date of the last day of the following month; e.g., lists received by December 15 would have a disposal date of January 31. The disposal date is officially assigned in a letter of notification. Libraries who have not received confirmation of a disposal date within 10 days of submission should contact their Regional for further information.

Page last modified: May 15, 2015

TX-FED experience: planning

- Regionals already looking for other disposal options
- FDLP eXchange announced:
    - Meetings between Regionals
    - Meetings with FDLP eXchange
- Early commitment to FDLP eXchange by TX Regionals
- Regionals: prepared Needs Lists for posting on FDLP eXchange
- Began notifying selectives: via listserv and during site visits

TX-FED experience: communication

"FDLP eXchange is coming to Texas"

1. Initial email to selectives: as early as May 2017
   a) Framed as improved disposal procedures
   b) Next steps: what selectives needed to do

2. Updates to selectives: delays in launch, continue preparing

3. Troubleshooting with FDLP/GPO and selectives. Example: templates

4. Ongoing: new FDLP coordinators: "All disposal lists are managed through the FDLP eXchange tool. Details and instructions below."

TX-FED experience: communication part I

From: -- TX-FED -- <TX-FED@unt.edu> **On Behalf Of** Angela Kent
Sent: Wednesday, May 17, 2017 8:34 AM
To: TX-FED@unt.edu
Subject: [EXTERNAL] FDLP eXchange is coming to Texas

Exciting news! Texas will be adopting the GPO's FDLP eXchange online tool, with an anticipated start date of **June 15, 2017**, pending any delays in release from GPO. After this date, Texas selectives will now be able to upload and keep track of their disposal lists on the new FDLP eXchange website. Continue reading for details (as we know them) and next steps for selectives.

TX-FED experience: communication part II

FDLP eXchange and disposal lists:

·   Disposal lists will be reviewed for one week for Texas regionals, then two weeks for Texas selectives, then an option to offer nationally. If you choose not to offer nationally, the disposal date for your materials would be three weeks regardless of when in the month the list was submitted. **This is a far shorter timeline than the disposal list process now and, for this reason, _selectives may wish to plan on holding onto their disposal lists until they can post on FDLP eXchange._**

·   Disposal lists can be batch uploaded in the following formats: Excel (.xlsx) spreadsheets, a comma separated values (.csv) file, or MARC xml. Templates will be made available by GPO (not yet available).

Questions/concerns? Please contact your regional. Both Texas regionals have completed the intent to adopt form and will be meeting with GPO in preparation of the rollout.

Region I. Tom Rohrig/TTU. tom.rohrig@ttu.edu. 806-834-2632.

Region II. Angela Kent/TSLAC. akent@tsl.texas.gov. 512-463-5426.

TX-FED experience: communication part III

Also available:

·   FDLP eXchange main project webpage: www.fdlp.gov/project-list/fdlp-exchange

·   FDLP eXchange FAQs: www.fdlp.gov/project-list/fdlp-exchange-faq

TX-FED experience: communication part IV

From: -- TX-FED -- <TX-FED@unt.edu> **On Behalf Of** Angela Kent
Sent: Wednesday, May 17, 2017 8:34 AM
To: TX-FED@unt.edu
Subject: [EXTERNAL] FDLP eXchange is coming to Texas

Updates as we find out about them, will be posted to the TX-FED discussion list. Make sure you and your colleagues are subscribed to the TX-FED Discussion List for federal depository librarians in Texas. Email: TX-FED@unt.edu

Tom and Angela
Region I. Tom Rohrig/TTU. tom.rohrig@ttu.edu. 806-834-2632.
Region II. Angela Kent/TSLAC. akent@tsl.texas.gov. 512-463-5426.

TX-FED experience: communication part IV

Next Steps for Selectives:

· (required) Log into your FDLP profile to confirm all information is up to date: catalog.gpo.gov/fdlpdir/login.jsp

· **Share this good news with your administrators**. FDLP eXchange benefits: www.fdlp.gov/file-repository/about-the-fdlp/gpo-projects/2849-how-will-the-fdlp-exchange-benefit-my-library

· Register for training designed for selectives, available starting June 1st: www.fdlp.gov/project-list/fdlp-exchange#selectives

· Review the virtual meeting, "FDLP eXchange: Managing Discard Processes," which provides an overview

http://login.icohere.com/connect/d_connect_itemframer.cfm?vsDTTitle=FDLP%20eXchange%3A%20Managing%20Discard%20Processes&dseq=18332&dtseq=105819&emdisc=2&mkey=public1172&vbDTA=0&viNA=0&vsDTA=&PAN=2&bDTC=0&topictype=standard%20default%20linear&vsSH=A

TX-FED: FDLP eXchange Early Adopters

TX-FED experience: training

1. Directive: "Register for training"

2. Directive: "Review the virtual meeting, "FDLP eXchange:

   Managing Discard Processes"

3. Where to find more info:
   a) FDLP eXchange main project webpage: www.fdlp.gov/project-list/fdlp-exchange
   b) FDLP eXchange FAQs: www.fdlp.gov/project-list/fdlp-exchange-faq

TX-FED experience: training

1. Sandbox training (Training Site)

2. Virtual training via FDLP Outreach.

3. On-site training via FDLP Outreach. Dallas, during TLA

4. One-on-one training during Regional site visits

TX-FED experience: technical challenges

Examples of technical challenges and troubleshooting

• Loading spreadsheets into eXchange

• Notifications

• Both regionals see all available offers at the same time

Need help? Ask GPO or email FDLP Outreach

TX-FED experience: Tips

- Communicate and prepare selectives

- Emphasize the positive and the benefits

- Prioritize completing and loading Needs List

- Make use of the FDLP training and support

TX-FED experience: Q&A

Tom Rohrig

Region I Coordinator

806-834-2632

tom.rohrig@ttu.edu

Angela Kent

Region II Coordinator

512-463-5455

akent@tsl.texas.gov