Quick Start Guide for Regionals

Quick Start
- Links to manual input (Needs & Offers)
- Link to review offers in your region
- Regional library account administrators can see the work needing their approval or regional review

My In-Progress Items
- Displays matches and requests for offers you have listed or needs you have requested
- Lists things needing your action
- Click on SEE ALL OF MY IN PROGRESS ITEMS to see anything awaiting final action to close out the transaction

Items for Regional Review
- Everything in your region being offered that has not been reviewed yet

New Items in the Repository
- Needs and offers your library has access to view and request at this time

Recent Messages
- Most recently created or received messages from or for your library

Notification—ONLY visible to you
In-Site messaging system—Contact other libraries. Is visible to everyone at your library
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LIBRARY ACCOUNT offers three options to manage your library’s FDLP eXchange account(s)

1. MY LIBRARY
   - View and edit the regional, selective, and ‘offer nationally’ review time periods
   - Add or deactivate User Accounts
   - Update library information

2. MY USER ACCOUNT
   - View and edit information about your personal FDLP eXchange account.
   - Set notification preferences for what you see in the notification bar and receive via email
   - Change the password for your FDLP eXchange account

3. APPROVE ITEMS FOR SUBMISSION
   - ONLY available to library’s FDLP eXchange administrator
   - Administrator approves needs and offers created by your library staff for submission into the Repository

Tip—Your username is your full email address
Review Offers allows your library to review offers from your selectives

Search and filter by various fields to streamline the review process

Check boxes below and apply Bulk Actions (Request Offer, Pass, Disallow)

Export to CSV format

Tip—There are no truncation(s) or wildcards
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**Input New Items**

**Tips:**
- You will have better matches if you do not input ranges
- You can use an Internal Note field to track your box or list numbers

**Add A New Need**

**Download Import Template and Examples**
- Download Need Import Spreadsheet Template
- Download an example of a prefilled spreadsheet (.csv)
- Download an example of a prefilled spreadsheet (.xlsx)

**Tips:**
- Upon import you may review and correct matched columns
- You may review and fix import errors

**Upload an Existing Need or Needs**

Lists should not exceed 150 items.
- Browse for and upload your list (should not exceed 150 rows)
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Content your library has requested or 'claimed'

In Progress Items = action is needed by your library

Offers (0)
You have no offers in progress.

Needs (3)

Tip — Have a question about a listing? Message the library.

Tip — The boxes around listed material in My eXchange are color-coded:
Blue = active, but no review or no further action is needed
Green = action is in progress
Yellow = awaiting administrative review
Gray = expired

Requested from Repository (2)

Tip — A “+” sign expands the entry
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Queue of everything being offered that your library is eligible to review and request

Export Offers Queue based on your search or filtering criteria

Request offers easily

Question about this offer? Message the library.
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Queue of everything needed by other libraries

Search Needs Repository

Question about this need? Message the library.

Tip—Keep an eye out for needs being requested due to disaster recovery or a digitization project.

- Newsprint Study
  - Y 4 In 8/4 N 47/2/95
  - 05/12/2017
  - Paper
  - 05/12/2017
  - Maryland Selective 1

- Amendments to the Nurses Training Act
  - Y 4 In 8/4 N 35/2
  - 05/12/2017
  - Paper
  - 05/12/2017
  - Oregon Regional 1 X

- Assistance to Nursing Education
  - Y 4 In 8/4 N 33/3
  - 05/12/2017
  - Paper
  - 05/12/2017
  - Oregon

- Adjusting Rates of Overtime Compensation
  - Y 4 In 8/4 N 2/2
  - 05/12/2017
  - Paper
  - 05/12/2017
  - Oregon

- Recovery of Overcharges
  - Y 4 In 8/4 N 2/3
  - 05/12/2017
  - Paper
  - 05/12/2017
  - Oregon Selective 2

- International Health
  - Y 4 In 8/4 H 84/13
  - 05/12/2017
  - Paper
  - 05/12/2017
  - GPO Admin
Tip—Looking for local publications?
Save a search performed for a keyword