

Unanswered Chat Questions Remaining at the End of the June 7, 2017 FDLP eXchange Training Webinar for Selective Libraries

Q: In case of one person claiming an offering, what happened if a second person wishes to get the same item? Does the system put the second person to a query?

A: When someone claims an item, it is no longer visible to other libraries. If someone has claimed something and then the two libraries are unable to arrange transfer (for example, if neither can pay for postage), the offering library should decline, then other libraries can see it again.

Q: Can you email the answers to these chat questions to all the participants?

A: Yes, we will email answers to the remaining chat questions to all the participants. We will also be going through the transcripts of this and the other webinars to update the FAQ on the project page and the help section within FDLP eXchange.

Q: Does the site match needs and offers, or is it all manual? - ie., one side has to recognize the match?

A: The site matches needs and offers. The first match is on the full SuDoc number, so we recommend using full SuDoc numbers whenever possible for the best matches. Users can also request other libraries' offers through the repository, even if the user does not have a need in the system to match the other library's offer.

Q: Can you limit advanced search to postings that have been added since you last ran the saved search?

A: Short answer: no, the system does not provide an option to do that automatically.

More complicated answer: there is an option to limit the search by the date something was posted. If you wanted to do that, you could load the saved search then put the date range in the posted date field before running the search. One potential issue with that is that the posted date would be the date it posted to the system, which is not necessarily the date that you could see it. So if someone in another region posted something on June 1 and that region had 10 days for regional review and 5 days for selective review, you could see it on June 16 after the combined 15 day review periods had expired. If you ran the search on June 12, you wouldn't see it yet because it wasn't available to your region yet. If you ran the search again on June 19 and limited it to things that had posted since June 12, it would be filtered out because it posted before June 12, but you weren't able to see it yet. A better approach might be to go in once a week and run the saved search for anything that posted in the last month to make sure that you can see anything that has become available to you since the last time you searched. I know that is clunky, but I think it is as close as we can get with this release.

Upshot: I think we need to take a look at refining to see if we can limit searching by "date it became available to my library" or something to that effect, instead of date posted.

Q: Will a sandbox be available for the system so that we can play with it or do training outside the live system?

A: Yes, we will be standing up a sandbox at the same time we go live to allow users to play with it and do training outside the live system.

Q: You just mentioned that Regionals adopting the tool. Are not all regionals using this?

A: Use of FDLP eXchange is optional. Many regionals have told us that they want to adopt the tool. Others have felt that it doesn't meet their needs or that they aren't ready to adopt at this time. If you're not sure if your region is adopting, I recommend contacting your regional. If your region chooses not to adopt the tool at this time, individual libraries can still use it to post needs or to post offers nationally after they have already been through the offers process in your region.

Q: Can we change those parameters (offering locally and nationally and number of days) per list or items? For example, there are some lists or items that we might not want to go on the national list.

A: Those parameters apply to whatever is in the system at that time. If you change the parameters, it will change them for anything in the system at that time. For example, if you have your national offers period set for 10 days and you change it to 15 days, it will change the expiration date for all of your offers in FDLP eXchange at that time to be 5 days later. If you have a bunch of lists that you're processing, you could probably try to do some staging, like maybe put in all the lists that you don't want to offer nationally together, then wait for them to expire before adding things that you do want to offer nationally. That could get pretty complicated though.

Q: Could you please repeat the fifteen day and 30 day requirements for regional and national submission. Our computer froze.

A: The regional sets the timeframes for both the regional review and the selective review within their region. If the regional sets 30 days for regional review and 15 days for selective review, then any offers posted by a selective in that region will go to the regional for 30 days to review and decide whether to claim the material. If the regional passes on it or the 30 days expire, then it goes to the other selectives in the same region who would have 15 days to review and decide whether to claim the material. If the 30 day regional review period and the 15 day selective review period expire (45 days total), it moves on to being offered nationally, if the selective has chosen to offer the material nationally. If the selective has chosen to offer the material nationally for 10 days and nobody requests the material, it would process through FDLP eXchange in 55 days and be eligible for discard at that time. If the selective chose not to offer nationally, it would process through the system and be eligible for discard after 45 days.

Q: Very impressive features and functionality. Please explain relation of regionals to selectives in using this system

A: I'm going to use Maryland as an example to illustrate. The University of Maryland (UMD) is the regional for Maryland, Delaware, and the District of Columbia. Johns Hopkins University and Washington College are both selectives in the region. If Johns Hopkins offers a document in FDLP eXchange, it goes to UMD as the regional first. UMD will review the material and determine whether they need it for their collection. If they do, they will request it, and Johns Hopkins will send it to UMD. That would end the process in FDLP eXchange for that offer. If they can't take it, but want Johns

Hopkins to keep it for some reason such as it is rare or the only copy in the state, UMD would disallow the offer and give Johns Hopkins a reason why it was disallowed. Johns Hopkins would keep the material, and that would end the process in FDLP eXchange for that offer. If UMD doesn't need the material and doesn't think that John Hopkins needs to keep it, they would pass on the offer. Then the offer would go to other selectives in the region, including Washington College. If Washington College sees the material and wants it, they would request it and arrangements would be made to transfer it to them. If none of the selectives in the region request the material, it would go on to the offer nationally time period if the offering library had chosen to offer it nationally.

When GPO is setting up FDLP exchange, we will make the connections between the regionals and the selectives in the region so that the system knows how to process materials. In the example given, we would put the University of Maryland's depository library number in the library records for Johns Hopkins University and Washington College. That information tells the system who is the regional for each selective and which other selectives are in the same region.

Q: You mentioned regional has to set up for their selectives?

A: The regional sets the review periods for regional review and for selective review in the region. There is a place in their library profile where they set those time periods, similar to the way that selectives set the time period to offer nationally for their own library. When the regional sets the regional review and the selective review period in their library profile, those timeframes apply to all the selectives associated with that regional. If it helps to see this, it is demonstrated in the "Getting Started – Regionals" training video linked from the project page at <https://www.fdlp.gov/project-list/fdlp-exchange> (scroll down to the Training Videos section near the bottom of the page).

I also mentioned that we are working with regionals who have indicated that they want to adopt FDLP eXchange and setting up the selectives in their regions at the same time. In case you were referring to that, let me explain that process a little bit. When a regional contacts us to let us know that they want to adopt FDLP eXchange in their region, we talk to them a little bit about how they want us to set it up for their region. We also send them a list of the email addresses of the depository coordinators of the selectives in their region from the Federal Depository Library Directory and ask them to confirm those email addresses for us. When we get the platform and start setting up the FDLP eXchange, we will activate the accounts for that regional and all the selectives in that region using the confirmed email addresses. That way each of those selectives doesn't have to contact us separately, and we can set up a region all at once.



If a region is not adopting the tool for discard processes in their region, the selectives in that region need to work with the regional to make sure they are following the correct process within their region. If materials have been offered in the region and nobody has requested them, the selective can use FDLP eXchange to offer the material nationally. Selectives can also use FDLP eXchange to post needs if their region is not using FDLP eXchange for disposition processes. In those cases, the selectives will need to contact GPO to have their accounts set up. We are trying to focus on getting the regions that are adopting FDLP eXchange set up first, so we are asking selectives to wait until closer to the FDLP eXchange release date to contact us about setting up their accounts. We will post a news alert when we are ready to start accepting requests from selectives in regions not adopting FDLP eXchange.

Q: Talk more about the "match" that you reference, based on SuDoc number

A: I'm going to go back to the Maryland example used earlier. Let's say that Washington College has a copy of the title Accounting for Social Insurance with the SuDoc PREX 2.2:AC 1/2/NO. 17 that was published in 1999. Their copy is in poor condition, and they want to replace it. They could enter a need in FDLP eXchange with the title, SuDoc number, publication date, etc., and indicate that the desired condition is Fine or Good. Let's say Johns Hopkins University offers a copy of the publication and indicates that it is in Fair condition. The offer would first go to the University of Maryland, who passes on it. The system would use the SuDoc number in Washington College's need to match Johns Hopkins University's offer, and both libraries would be notified of the match. Washington College would look at the matched records and see that they wanted Fine or Good condition, but the offer was in Fair condition. Since it is in better than the copy they have in Poor condition, they might go ahead and accept the match. If they decide they really only want something in Fine or Good condition, they would decline the match. If Washington College had entered the full SuDoc PREX 2.2:AC 1/2/No. 17 and Johns Hopkins had only entered the stem PREX 2.2:, the system would not match on the SuDoc number. However, if both libraries had the same title and the same publication date, the system could make a secondary match on words in the title and the publication date.

Q: So a need does not have to have a title to go with it?

A: Title is a required field in both needs and offers. However, if you wanted to put in more of a range-type entry, you could use a generic title. For example, you could put in "Works Progress Administration Publications" as the title with the SuDoc class "WP" and check the box for "Item doesn't have a date." I just tested that with the format paper and any condition, and it was accepted. Screenshot of the resulting need below.

 Works Progress Administration Publications 	WP	06/07/2017	Active
Published 06/07/2017	Postage Reimbursement Requested No		
Format Paper	Is This Document Available Electronically? No		
Classification Type SuDoc			

If I were going to do that, I would probably enter 2 records so that I had a second one using "WPA Publications" as the title to increase the chances of getting matches. I'm not sure how well it will match, but it would get the material into the system where people can see it, even if it doesn't match.

Q: Could you change the wording in the required field in the Offers area so that you can input the date the item is stamped rather than official shipping list date? It would be much easier for people making lists of older items while also ensuring that you uphold the time regulations.

A: You can use the date the item was stamped. That is what we meant by “Date Received by Institution.” We added “Shipping List Date” as an alternative because we thought some libraries might want to offer material that wasn’t stamped. The date it was stamped is actually more accurate in terms of meeting the regulations. We’ll review that wording and see if it needs to be revised. I’m looking at the manual entry form, so it may be different if you’re looking at the template. We’ll review for consistency. Here’s the screenshot from the form.

Date Received by Institution/ Shipping List Date

E.g., 06/07/2017

I don't have a date

Q: Sorry if I missed this, but does the system offer a template spreadsheet file to be adapted by staff submitting a batch?

A: There is a blank template in .csv format. There are also sample spreadsheets in .csv and .xlsx format in case it helps to have an example to illustrate how to fill in the template. There are different templates (and different sample spreadsheets) for needs and for offers because there are some difference in the fields for each type of record. These are available for download from the input screen where you can upload a spreadsheet. Here’s a screenshot of the links to download the offers template and sample spreadsheet (see top of next page).

UPLOAD OFFERS OR NEEDS

UPLOAD OFFER(S)



OR

UPLOAD NEED(S)



Upload an Existing Offer or Offers

Lists should not exceed 150 items.

XLSX, CSV, MARCXML only

Choose File No file chosen

IMPORT FILE

Download Import Template and Examples

- ↓ Download Offer Import Spreadsheet Template
- ↓ Download an example of a prefilled spreadsheet (csv)
- ↓ Download an example of a prefilled spreadsheet (xlsx)

Since FDLP eXchange is not available to libraries yet, we have posted the template files (but not the sample files) on the project web page at <https://www.fdlp.gov/project-list/fdlp-exchange>. They are about halfway down the page. There is also a data dictionary there to help people fill out the template. We hope this will allow libraries who want to do so to begin work on their spreadsheets until FDLP eXchange goes live.

Note: there is a revision to the data dictionary coming soon. We wanted to make it available as quickly as possible, but it still needs some work.

Q: Please talk through the entire match process and how to communicate between the partners other than changing the status. How much is automated and how much requires staff intervention is not clear to me.

A: I'm going to go back to the Maryland example used earlier. Let's say that Washington College has a copy of the title Accounting for Social Insurance with the SuDoc PREX 2.2:AC 1/2/NO. 17 that was published in 1999. Their copy is in poor condition, and they want to replace it. They could enter a need in FDLP eXchange with the title, SuDoc number, publication date, etc., and indicate that the desired condition is Fine or Good. Let's say Johns Hopkins University offers a copy of the publication and indicates that it is in Fair condition. The offer would first go to the University of Maryland, who passes on it.

The Johns Hopkins' offer would then go on to the Selective Review period where other selectives in the region can request it. The system would use the SuDoc number in Washington College's need to match Johns Hopkins University's offer, and both libraries would be notified of the match. How they are notified of the match depends on the notifications each library has set in their user profiles. A screenshot of the match notification options in the notification list where users set their notification is shown below.

- Matched (matched)
- Site
- Email
- Daily Digest
- Weekly Digest

The user can select all notifications as shown above, some of the notifications, or none of the notifications. A user from either library who has checked the Site box shown above will get a notification on the site via the little bell icon in the upper right corner of the screen when the system matches Washington College's need with Johns Hopkins' offer. A user who has checked the box next to Email will get a notification via the email used for their account. Both of the first two options (Site and Email) are one-off notifications that the user will get any time their library has a need or an offer matched to an offer or a need from another library. If the user only wants a notification once daily of all matches for their library that occurred during that day, the user would check the Daily Digest box. If the user only wants a notification of matches once a week, the user would check the Weekly Digest box. In this example, a user from Washington College would see the match button when reviewing My Needs in FDLP eXchange, but would not receive any notification. Likewise, a user from Johns Hopkins who did not select any notifications would see a match button when reviewing My Offers in FDLP eXchange, but would not receive any notification. There are additional notifications to set if users want notification when another library accepts/requests material that has matched in FDLP eXchange and when the match is complete. The match is complete when both libraries have accepted the match.

Let's say that Johns Hopkins sees the match first. The site administrator at Johns Hopkins would click the button to accept the match. The status of Johns Hopkins' offer would change to Match Accepted.

The match is not complete until Washington College also accepts the match. When Washington College goes into FDLP eXchange after Johns Hopkins has accepted the match, they would see the status for their need has changed to Match Requested. Washington College would click the Accept Match button, and the status of their need and Johns Hopkins' offer would both change to Match Complete.

If Washington College and Johns Hopkins needed to work out any details on the transfer of the material, they could use the messaging tool inside FDLP eXchange to do so. Using the messaging tool would allow others in either library to see the communication, so that if one staff member started the process and another needed to complete the process, both would be able to see the message thread.

When Johns Hopkin mailed the document to Washington College, Johns Hopkins would click the Mark as Mailed button on their offer. The status of Johns Hopkins offer and Washington College's need would both change to Mailed. When Washington College received the material, they would click the Mark as Received Button. The status of Washington College's need would be changed to Fulfilled and the status of Johns Hopkins offer would be changed to Transferred.

Q: What are the timeframes for offering/claiming? Are the regional timeframes and national timeframes staying the same?

A: The regional sets the Regional Review period and the Selective Review period for their region. In both cases, the regional selects from a drop-down menu of timeframes ranging from 0 days to 90 days. Your library sets the "offer nationally" timeframe for your library. If your library chooses not to offer materials to libraries outside your region after they has been through the Regional Review and the Selective Review, your Library Administrator would not check the box next to Offer Nationally? If you do want to offer materials to libraries outside your region after they have been through the Regional Review and the Selective Review, your Library Administrator would check the box next to Offer Nationally? and select a timeframe from the drop-down menu to set the number of days (again a range from 0-90) that you want to offer the material outside the region.

The legal requirements for offering material to other libraries before you discard it requires you to offer it first to your regional, then to other selectives within your region. It does not require you to offer things outside your region after they have been offered to libraries in your region. Therefore, offering materials outside your region (aka "Offer Nationally") is recommended, but not required.

Using the Maryland example from previous responses, let's say that as regional, the University of Maryland set the Regional Review for their region to 15 days and set the Selective Review for their region to 15 days. Let's say that Washington College wants to offer their materials outside the region for 10 days. Washington College would check the box next to Offer Nationally and select 10 from the drop-down under Time to Offer Nationally. Johns Hopkins wants to offer their materials outside the region for 20 days, so they would check the box next to Offer Nationally? and select 20 from the drop-down under Time to Offer Nationally.

When Washington College entered an offer in FDLP eXchange, it would go to the University of Maryland for regional review for 15 days. If the University of Maryland did not request it, the offer would go to Johns Hopkins and the other selectives in the region for selective review for 15 days. If nobody requests, it would complete the review within the region in 30 days. Because Washington College has set their options to offer nationally for 10 days, the material is then offered to libraries outside the region for an additional 10 days. If nobody claims the material, it will complete the process in 40 days

(15 days for regional review + 15 days for selective review + 10 days to offer nationally). At that point, Washington College can discard the material.

When Johns Hopkins entered an offer in the system, it would follow the same path through the regional review and selective review. In other words, it goes to the University of Maryland for regional review for 15 days, then to Washington College for selective review for 15 days. At that point, Johns Hopkins' settings for Offer Nationally kick in and the material would be offered outside the regional for an additional 20 days. If nobody claims the material, it would complete the process and be eligible for discard in 50 days (15 days for regional review + 15 days for selective review + 20 days to offer nationally).

If a third library in the same region did not want to offer materials outside the region after offering them to libraries within the region, they would not check the box next to Offer Nationally? and would select 0 from the drop-down menu under Time to Offer Nationally. When that library entered an offer in the system, it would first go to the University of Maryland for 15 days for regional review and to Washington College, Johns Hopkins, and the other selectives in the region for selective review for 15 days. At that point it would not be offered outside the region. In that case, the process would be complete and the material would be eligible for discard after 30 days (15 days for regional review and 15 days for selective review + 0 days to offer nationally).

Q: Do you set password or do we do that?

A: You will set your password. Once we have your account set up, you will get a notification that your account has been activated, then you will go to the site and create a password.