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>> Please standby for realtime captions. Hello everybody, just doing a sound check. We will be ready to get started in just a few minutes.

>> My name is Kelly and with me today is our presenter here to answer questions at the end. Before we get started, I will walk you through our annual Academy reminder. If you have any questions, enter them in the chat box in the bottom right-hand corner of the screen. We will keep track of the questions and at the end, we will relay those. We will be sending you a certificate of participation using the email that you use to register for the webinar. So, if you have additional folks who are listening in, just email us and let us know the name of today's webinar and the name of those participating so that they can get certificates back I will repeat that in the chat box after the meeting am also recording the session today. After the session, you will get an email with a link if you want to refer back. Finally, if you click on the fullscreen button on the bottom left-hand corner of your screen, when you are in that mode, and you want to get out of it, hover over the blue bar that will appear at the top of your screen and you can return back to that. With that, I will hand the microphone over to Lisa and she will take it from here.

>> Hello everybody, and welcome to our session. This is the session for regionals and at the end we will have time for questions. This should not take too long. We will have a lot of time for your questions. If you follow this to the login page, I will talk to you about the differences between this. This will be recorded so you can go back to the Academy page and take a look at that. I am not going into the live at site, I am going into the training site. Will use your email account to log in and that is listed in the library directory. And you need your password. You put in your email, request your password, and it should be sent to you in an email and you can set your password to something you can remember. Sometimes it goes through the spam filter so always check your spam folder. You can always contact us and we can reset the password for you. We also set up accounts for those listed in the directory, so if you have somebody who needs the account in addition to you, the coordinator will just need to know that you need that set up for them for nadirs and administrators cannot set up these on their own, I will show you how to do that when we login. It is important to remember that if you do not remember your password, if you try to do it five times, you will get locked out. If you try four times, just shoot us an email and we can reset it for you, otherwise it will lock you out and it will take hours to get in again. I will go ahead and login. What you are seeing is the dashboard which is what you will see when you first login. It shows you're in progress items, which are items you need to look at for review. You can quickly see them on the front. This is where you will see anything if you need to do something that needs your attention.

>> I will start in the library account there are two different libraries, -- accounts, one for your libraries, and one for other things. This is where you have library administrators. Student workers, or somebody who is on staff that will be entering offers into the system, they cannot approve offers or put any needs out of the live system without the administrator looking and approving them first. But it is somebody who can do some of the work for you, and you can add those yourself. I will show you how to do that yourself. You go into add user, put their email address, give them a password, and they would be added as a library user.

>> This is when you will want to remind them to use their email address.

>> As we do this, a lot of people are going in and changing their usernames away from their email address. While the system will let you do that, it has caused problems with passwords and people not being able to log and. They reset their password because we do not know how to search for them in the system. It is some confusion. It is best to leave it as your email address, that is the simplest way.

>> This is your library account. It is a regional library and because you are regional, you are able to set the times for regional and selective review. You do that by clicking the edit button. You can add any of this information that is not required, address, city, state. You can set the time. This is the time that everybody and your region -- in your region. You can set it to whatever time you would like to set it for and we give you a chance, how much time you had to look at it and pass it over to state number two, we will look at it before it passes over to national needs and offers. These do not need to be the same. You can have five days for regional review, and 30 days for selective review. Is the only thing that is important is that if there are two regionals in your state, those need to be set the same. The system will allow you to do it, but it can confuse the system and it will not work right. It can cause problems. We are not changing the fact that regionals is in charge of this card process, you work together anyway so you can continue to do that and decide what time you will use for your region.

>> If you want to offer nationally, it is important to check this box. This will give you the opportunity, once everything goes through regional review and goes through selective review, it goes through phase 3 which means it is offered nationally. You can choose how long you want to something to be on the nationalist. It is important to remember that regionals sets the time for regional and selective review, but each library chooses whether they offer nationally and how long they want to offer nationally. That is library account.

>> You also have your user account. This is something that every user has. The library is something that everyone in your library has access to, this is your personal account. This is where you set your password and you do not change your username, and where you set your notifications. You can choose what you want to be notified about and how you want to be notified. You go through your preferences, if you want to be notified about whether or not you are allowed to discard an item, whether you want to get an email or do that on the side, it will happen here. You will get a notification like the old AOL mailboxes, you have mail. For the training side, the email notifications are turned off except for the email that you would get to reset your password. We did not want to confuse people forgetting the same notifications from the training site and the live inside. It would be confusing about which one it is coming from. You should not get any emails from the training site.

>> You have all sorts of options, and everyone will choose something different. We just wanted to make sure you got your notifications and messages. You choose how you want your messages, click submit, and there you go. The changes have been saved. It is letting you know that it is all saved. The final thing that regionals has and selective's do not, I am getting ahead of myself. The next item, administrators have this but users do not, approve items for submission. What happens here, if your student worker or one of your staff members who only has user status, enters a need or offer, you need to look at it before it goes to regionals. This is the case for regionals and selective's. It will never come to you if it has not been approved by the library administrator. We have a test document, if you want to submit it to the administrator, everything is perfect, and you are okay with it, you click submit it to regional, and it starts in phase 1 to regional review, then to phase 2, then to phase 3. That is something that only the administrators can see. That is something you need to decide, do you want them to be in administrator

everything they do automatically goes to the regional or to look at what they are doing before hand. If you need a second administrator, we do that on the back end. -- And. -- end. You can call us and we will be happy to get that set up for you. You can have as many administrators as you want, I think that most people have three but we are flexible.

>> Also, if you see something in here that someone has entered and it is wrong, all you need to do is click edit and you can edit it there.

>> The next thing, this is what regionals and selective's have our offers. You will see all of the offers that have been submitted to the region from your selective's. At this point you can request the offer, say that you like it, you want it, pass the offer. You do not want it -- want it and you send it down the line. Or, disallow, you don't want it but they need to keep it so you cannot allow them to get rid of it. Accepting and passing can be done in blocks. Excepting, you want them all, so you will take them. Apply it. We do not allow disallow to be done in bulk because it is required that you give people a reason why it is being disallowed. If somebody put something in and it is the only copy in the region, and you do not have a room for it, you would write to them and tell them, you need to keep this. So I will request this one. And to do this one as well. It is slow because we are going through all of the different, we were plugged into a different place. This one, you will pass. It goes straight to phase 2. Once you pass it, it goes on to the selective's and they can choose if they want it. This one we will select disallow. So, you will want to send a message and let the library know that we are disallowing this.

>> You might want to send the message before you disallow it.

>> If you click the button she is clicking, it will go to the one lower on the list.

>> Yes, you just submit the message there and disallow. I realized that as I was doing at. -- It's. -- It. It is important to remember, once you pass it, it goes into the next phase. If you had your time set for 30 days, and on day 22, you pass an offer, it starts all over again for 30 days that you chose for selective review. It does not wait eight days until it goes in there. If you do it on the first day, it goes through on the first day. Once you have passed on it, you will not see it again. It does not disappear from the system, but your selective will be able to see at. -- See it. Once you request the offer, it will notify the library that you have requested it and they will make arrangements to send it to you.

>> You can also filter this by library.

>> Yes, absolutely, if you know that one of your selective is in a rush, you can privatize by going through someone else's library. You can also filter by condition, you can filter by formats and all of these things as well. I find the filter by library to be a good one because I know sometimes there are libraries who have emergency situations where they need to decrease their floorspace in a short amount of time, so you may want to prioritize their offers. This is only available to regional accounts, it is not available for selective accounts.

>> Next, we have input. This is where you would input your offers and needs. There are two ways to do this, there is a manual and you can upload a spreadsheet. I will show you how to upload the spreadsheet but I will not go far into it. We have a another webinar coming up on August 23 that will be all about how to create spreadsheets and make the best use of them and get everything in there in the best way possible. I will show you had to go to the process of uploading at.

>> First I will do manual. It is important to note that the input offer and input need are different. They require different things. The offer looks like this. There are a lot of required fields for offers about needs do not have, such as publication day, condition, format. You are holding in actual item if you are offering at. Sometimes with a need, I do not mind what format it is, I take any condition. It is more flexible with those fields. Because we are regionals, I will offer a need. I am just going to input a title. Just type it in, and anything that has an Asterix is required. You can say whether this is a dock number or another type of number. We will go ahead and choose SUDOT. And the year. You can choose the month and the day and the year, but only a year is required. This one is from 2012. If it is a range of materials, or a range of dates, you can put the end date as well but it is not required. If you do not have a date, you check this button. Desired formats, you can check as many as you want, whatever format you want, but we will just click paper. We will click paper and that is fine. Postage reimbursement available, you can click yes or no. If you absolutely cannot ever do postage, you click no. Some libraries can do, if they are in the state, we can pay the postage, they pay postage up to \$10 pick what we are suggesting is click yes, and go down to notes. And endnotes, you can say I can pay up to \$10. That way, people can see that that is all that you can do. If it is more, you cannot do it. Here, you can select any condition. If you wanted to know what we mean when we say fine, good, or poor, we have expectation of our parameters right here, so you can use that to judge. If you need something for a digital dictation project, -- digitization or a disaster project, you can see that someone will put it up, they will say that they have an extra one and they are putting it up for disaster recovery for you. Once you do this, you check for any errors and it will let you know if there is anything that is not filled out properly. If you see a green checkmark, that means that you are good. You click submit. Then, you will be able to see in your needs, the item. If anybody else enters an offer for this item, it will match to you. You will be able to look at it and say that you would like to have it. All matches are based on the sudoc number. The more information you can put into that, the better. That is how you input a need manually. It is straightforward and simple.

>> The other option you have is upload. You can upload a spreadsheet, we have templates down here, we have it need import spreadsheet, and if you are on the offers a download page, you will be able to upload a template for offers as well. They are different for the same reason. Some of the required fields are different for needs and offers. I have one already made, so I will use that. You go in and you import the file. What you get is a list of everything that you have uploaded on the spreadsheet. I can open that and show you what it looks like. We will have a special session for that on August 23. This tells me that there are no errors, if there were errors, you can tell -- it will tell you what they are, and you can go in and edit them and change them. This is also something that is very cool. One of my favorite things, you can match the headers in your spreadsheet to the system. If you have a title where everything is in a different order, you can say, title is matching to title, and it is hard to show because mine does match.

>> Change title to does not match, it will change it.

>> This is what happens when the header in the spreadsheet does not match the system. You get errors. So, it is telling you that you need to have your document title.

>> Or, you can change it to match correctly. So I will go and match title to title.

>> There will be more on that on the 23rd. It is cool. And hard to show, because my template matched. Sometimes, if you call it name, instead of title, and you have name in your spreadsheet, you would match name to spreadsheet.

>> One thing that happens a lot, people call the Sioux dock -- sudoc edits not, so you need to go in and match at. -- Match it's.

>> Match it. They will be notified and they will be able to get those items. This works the same for my offers, if you enter offers, it works exactly the same, if somebody else has a need that matches your offer, you will be notified. Only if it is available. First regionals, then selective's, then, people choose it to offer nationally and it will be available then. You should not see anything until it is actually available. If you do, let us know. You only see your things, you do not see anybody else's. And progress items, these are things that are in the process somewhere, things that need your attention, going through the process, we have matches, if somebody has matched you, you will see it here. I will skip over to needs and offers first before I discuss my request.

>> The needs and offers repository is a list of everything that is available to you, whether it is in your region or not. It is something that is being offered by your regional or your selective's, or something that is in the national space. You can take a look and see what other people are offering and say that you also have that. You can copy it or offer it as well, you can see things in the needs list, and something you did not realize that you wanted it, you can create a need that matches that offer, so it will match with you and you can get that, because I did not know it existed but it looks great. I will show you how to do that. If you click on something, something that somebody is offering that you would like to have, if it is not available to you, or if it is a need and you actually have the offer, or vice versa, you can copy item, create a new need. Submit it. It is now a need that you have. I will show you from the need side because I think that is more cool. If you know that somebody wants this book and you have an extra one that you have not put into the system, you can copy, create an offer, submit it, and now you have an offer that will match with that person's need. There you go. Going back to Mike's change, if you look at my request, that is what will be listed here. Any request outside of the matching component of exchange, if you have looked at something and requested something, even though it was not a match, it will be listed here. Finally, before questions, I will show you the advanced search page. This is where, if you have a certain subject that you collect, you can search here. You can search needs or offers and make sure that you are specifying which one you want. I always say Congress, because there are always a lot of things with Congress. You can do a specific classification number, you can due dates, you can look at only certain libraries. You can show results from your region, you can look at only your results if you want to. Look at paper, look at conditions. You can also only show digitization and recovery if you want to give things to libraries that are recovering from a disaster. Then, you will see here. A list of things. You will only see things that are available. If it is in another region's regional review or selective review period, you will not see those until they are available. What is great is you can actually name this search, save the search, and run it again. Run it every week if there is something that you are looking for, new items posted on the subject, however you want to do that. The hard part is remembering to check, see results. You need to click see results to run the search. Finally, we have a help section. We are working on this, it is something that every time we get new questions, we look more and more at. You can always contact us at outreach. I will post that in a little bit on the last slide. You can go through ask GPO, however you want to do it. We are happy to help. We do not mind answering your questions. We do not mind walking you through it, having sessions with you, we have no problem doing that at all. I am willing to open it for questions, unless Lisa has something else. I will open it up.

>> Remember, if you have questions, put them in the chat box on the bottom right-hand corner of the screen.

>> One question, does the site inform us when offers have expired?

>> If you select that notification that shows it, it should notify you that you are allowed to discard it. If you have chosen to offer things nationally, we are currently experiencing things not expiring when they have gone through the national period. If you have not chosen national, they are expiring correctly at the end of a phase 2. Right now, you are getting a notification that they expire after phase 2 and we are working on the bugs to get the notifications from when it expires offering nationally.

>> On the homepage, the new items in the repository, what does a data number include?

>> That includes any new needs and offers that you can review. If you are in region A, and a selection in region B, but it is still in regional review, it will not show their. And will not count as a new item. The period is the last week, it will give you a date to send whatever dates. If you can see it, if it is at a stage where you can't see it, you should be able to see anything, if you are regional, you should be able to see anything that you have not passed on, and anything that has gone nationally in other regions.

>> Does the sudoc matching sound alike, does -- or does it need to be the exact name, for example, if one library uses a sudoc and one doesn't, does it matter?

>> If you put an a partial, it will not match someone who put in a full sudoc number, so in that case it does.

>> We do not require selected to offer everything nationally. How would one go about offering pre-1970 items nationally, but not?

>> The system automatically offers everything nationally. I believe you can mark them discarded. It is a basically, right now, all or nothing. That may be something that we need to look at for future enhancements. Only offering certain things that nationally. If you have selected to offer its nationally, everything will go nationally. I think that you can offer it depending on what it was you wanted to offer.

>> Is there any way to bypass the shipping list for items of 250 or more.

>> Not really, that is something that we are planning to fix on future developments. But, it was something that was an easy fix to fix for larger list and not a shorter list. For the shorter lists, you can leave it blank and you will need to check the box. It does allow you to get it in their. We had a problem with the longer list because you did not have that option of checking a box. There was no way of getting it in their. What they are talking about, downloading the spreadsheets, if you do not have a shipping list date, you would just go through and manually check a box saying, I certify that this is over five years old. We were able to fix it for smaller lists, -- larger list, where you could just put know, or leave it blank. It will accept it. Because the process is on the backside, or different, for the smaller and larger lists, it could not be fixed for smaller lists. You will need to go in, and check the box manually if you do not have a shipping date. My suggestion is to try to make your list 251 items when possible. If not, just put the shipping date in.

>> Are alerts only reviewed on the site? I have checked the box to receive alerts but have not received alerts through my email.

>> You should be receiving them if you have marked at. It is possible they are getting stuck in your spam filter. If you can email us, let us know what is going on, and we will look into it. Just email us at outreach.

>> Any other questions? Right now, the system will not let you offer anything new worth in 2013, but if I receive a duplicate, how can I add that into the system?

>> If you are adding it manually, you can set the box to indicate that you do not have a shipping list estate. That should allow you to accept it. Or, you can do what we talked about, if you are doing a spread sheet, with the long list, like we talked about, putting none in, and checking the box.

>> In future enhancements, will there be a way to correct and incorrect -- and incorrect -- an incorrect sudoc number or not?

>> Perhaps, but you can always add a second sudoc number so if you had entered something with one sudoc number, and the selective had entered it with a different, you can at least tell that you are looking at it and it is the same thing. A lot of support for that idea.

>> I think that was a community suggestion.

>> Are there other questions? Something you would like to see again? Ideas for future enhancements?

>> Is it possible for selective's to bypass the regional and state review and only offer nationally? Yes, in a way. I will go back to sharing my screen so I can show you. As a regional, you can set the review period. What you can do, is set the review time for zero and zero. I am assuming you are asking this because you are one of the libraries who is not using this system, but the selective want to use its nationally. You can select zero, zero, or, five, if you want to make sure that they are not offering things that you have not seen. That is your review time, and these electives will go into the library account, and click to offer nationally. That way, when they enter it, it will either go forth zero review days, or write international review, or, if you want to take a look at it first, you can have it for five or 10 days and it will pass automatically. If you are setting that for your selective's, I would remind them to make sure that they check that box to offer nationally, because there have been libraries where it looked like they were trying to offer nationally, and it expired from the phase 2. They had not checked that box however so it did not go out nationally. Add to that point, if you want to offer it nationally, you need to reenter it. There is no way to bypass that.

>> We are reiterating as much as we can the fact that you need to check the box if you want it to be nationally. It is something that we did not think of. We did not think it would be, we have worked with it so much we thought it was obvious, but we saw that it wasn't something that people need help with.

>> Yes, it might be good to just have that box checked at default. -- As default.

>> Are there any other questions? Can you edit an offer after it has been approved? No. There is no way to do that. We have had people asking about that so that is in our list of possible future enhancements if we can work that out.

>> One of the problems is, it becomes a question of, if something has already passed through the regional and you realize you messed up the sudoc number, and you make and edit so that it looks like something else, will it need to go back to regional, or is it something that you are offering three years, and now I am offering one year, that is probably something that they will want to look at. At least for this week, we set it up so you could not edit.

>> Final call for questions. If you have any questions after the session, and you think of something, feel free to give us a call or send us an email, we will be happy to answer. All right. Thank you for joining us. We appreciate it and we hope to see you on August 23 for the spreadsheet it will be a lot of fun. Thank you everyone.

>> [Event Concluded]