

Demo for FDLP eXchange Release 1.2 – webinar held 11/28/2023

Questions and GPO responses

Question:

What is the difference between Input Offers and Approve Items for Submission buttons?

Response:

Input Offers is for entering a new offer. Approve Items for Submission is for a library admin to approve items that have been entered by a library user.

Question:

Once our offers are marked as discarded, is there a way to remove them from eXchange?

Response:

No, you can't remove the items from eXchange after they've been discarded. We kept them in the system so that we have the data for statistics at a later date.

Question:

What does "Disallow" mean with regard to regional depositories?

Response:

"Disallow" is for when a regional wants the selective to keep the item. They should communicate with the selective to indicate why they want the selective to keep them item.

Question:

Does the checkbox by the title field indicate that you can bulk select titles rather than select them one at a time?

Response:

Yes, the checkbox by the title field functions as a "select all" checkbox to select all items on the page. It does not select anything beyond the page that is displayed.

Question:

If we chose to include the dates for offers, do we still have to follow specific formatting- MM/DD/YYYY?

Response:

Which dates are you referring to publication dates (start and end for ranges) or shipping list dates? Shipping list dates should either be a full date (MM/DD/YYYY) or "None". Publication dates can be a year only (YYYY), a month and year (MM/YYYY) or a month, day, and years (MM/DD/YYYY). The publication start field can also be "None."

Question:

Do you have a time frame for when the new templates will be available?

Response:

The templates are available now on the instruction page at <https://www.fdlp.gov/instruction/fdlp-exchange>. The samples on the Input page are consistent with the new templates. We don't have a timeframe on getting the blank templates added to the Input page.

Question:

There is a button for Disaster or Digitization. Do these go to the top of a list? Does this show in the Regional review?

Response:

Disaster Recovery and Digitization are flags for Needs in the Needs and Offers Repository. They are not on Offers in the Needs and Offers Repository. They can be used to limit a search, but do not impact matching, etc.

Question:

Can you have more than one admin?

Response:

Yes, you can have as many admins as you want. We recommend that whoever is responsible for processing needs and offers at your library should be a library admin, whether that is the coordinator, someone else, or multiple people.

Question:

Do I need to be logged into the eXchange to get the templates?

Response:

You have to be logged in to access them from the Input page, but not from the link in the chat above. [<https://www.fdlp.gov/instruction/fdlp-exchange>]

Question:

If I have received a duplicate on a shipping list and I want to offer it on the system, how do I deal with the date of the document (very recent) and date received (yesterday)? Can there be an option for indicating that an item is a duplicate receipt?

Response:

You should use the correct publication date in the "publication start" field. For the Date received field, leave it blank if you're using the manual entry form, or put "None" (without the quotation marks) in the field in the spreadsheet. I would also put a note in to indicate it is a duplicate if you are a selective and want to let your regional know why you are offering something received so recently.

Question:

Is there a way to see the date when an offer lands in phase 2 and then in phase 3?

Response:

There is not a place to note dates by phases. There is a report feature, My Offers > "Download current view" that will download your view and that would include the date of moving between phases if you have it selected.

Follow up question:

What about filters for phase 2 and phase 3?

Response:

My Offers > sort column by Phase

Also, Advanced Search > Offers > Posting Library and check the box for Only show results from my region.

Question:

Can you batch update the "Status" instead of updating the status, one-by-one? When a Regional allows us to discard.

Response:

If you are in My Offers, use the Filter by Status = Allowed to Discard. Next use the Bulk Actions: Mark Selected Items as Discarded to discard all of the items.

Question:

If you by mistake discard an item, is there a way to reverse the action?

Response:

No. You can reenter it and run it through the system again. If you pull the item up, you can copy the item again to avoid having to retype it.

Question:

What is the best way to check for a SUDOC #? I feel like I've had items get kicked back because I have the wrong SUDOC number or entered it incorrectly.

Response:

Punctuation matters, but spacing in the SuDoc does not. FDLP eXchange doesn't check if the number is correct, but it reviews the format or formula of the entry. When uploading a spreadsheet, eXchange will indicate if there is an error in the classification, specifically with punctuation. For a correct SuDoc that doesn't meet the format and continues to return an error, select the classification as "Other" when manually inputting the item.

Question:

How do you change match complete to something other than Mark as Kept or Mailed? As an example, the requesting library and the offering library could not agree on postage, therefore the items could not be mailed. The offering library would like to change the status of the Matched items to discarded. Is there a way to do that?

Response:

It is possible to Decline Match for items that are in the Match Complete status in eXchange. This will move the item either to the next match (if another library has matched them item) or back into the Phase the item should be in based on the amount of time it has been in eXchange. (Note there is no option to Decline Match for items that have already been marked as Mailed).

Question:

Should we use the current sudoc number for the Serial Set even if we are offering older volumes that predate that sudoc. If not, how should serial set call numbers be entered?

Response:

Unfortunately, almost all libraries that have entered Serial Set materials into FDLP eXchange have used a different SuDoc number, so there is no recommended SuDoc number.

The most commonly used SuDoc numbers are either Y 1.1/2: or Y 1.1/2:SERIAL. There are different methods that could be used to increase the likelihood of a need or offer matching in FDLP eXchange for Serial Set items. For example, by duplicating each need to match offers posted under either SuDoc number, or using a saved search in the Advanced Search menu. The pros and cons of each method are described below.

Entering duplicate needs to match offers posted either way	
Pros	Cons
Triggers matches for offers posted with SuDoc numbers in either format	Twice as many needs to manage in the system
Having a need in the system prioritizes your library's needs, and you could get a match on an item that won't be available in search because of the match	Lots of work to enter the duplicate records, potential need to delete and re-enter existing needs to add notes referencing the duplicate needs
Less ongoing work required to run searches on a weekly/regular basis and review lists of search results	
Relying on saved search	
Pros	Cons
Less time required for set up (entering one saved search vs. entering multiple needs)	Doesn't place dibs on a need by posting a need that would match as soon as an offer became available
Search doesn't require an exact match on an offer's full SuDoc number as entered, so might catch offers that would be missed through matching	Could be time consuming to review lists regularly, might mean reviewing the same items multiple times if they are available to your library for more than a week, based on the timeframe for the review period for that offer in the system