

Demo for FDLP eXchange Release 1.2



FDDL eXchange 1.2

The screenshot displays the FDDL eXchange 1.2 dashboard for a library admin. The top navigation bar includes 'Dashboard', 'Review Offers', 'Input', 'My eXchange', 'Needs & Offers Repository', and 'Advanced Search'. The main content area is divided into three columns. The left column contains a sidebar with buttons for 'INPUT NEEDS', 'INPUT OFFERS', 'SUBMIT ITEMS FOR REVIEW', and 'REVIEW OFFERS'. Below this is a 'Recent Messages' section showing 2 unread messages from Lisa Russell Regional Depository. The middle column shows 'My In-Progress Items' with 0 offers pending review and 6 matched needs pending review. The right column shows 'New Items in the Repository' with 333 items as of April 6, listing three items: 'Nursing home vaccination reaching Healthy People goals', 'Mandatory managed care changes in Medicaid mental health services', and 'Inspection of suspension-type highway trailers prior to loading and unloading with powered industrial trucks'.

- Primarily new features added
- Dashboard remains the same
- Screenshot shows dashboard for library admin at a regional
 - Some content shown will span 2 columns as it currently does



Changes in FDLP eXchange 1.2

Spreadsheet Changes

- Remember, as with release 1.1 in June 2023, and as explained in the [webinar](#) on May 4, 2023, spreadsheets are now limited to 250 lines maximum and must be in CSV format.
 - Instructions for converting from XLSX to CSV are linked from the [FDLP eXchange Instructions page](#).
- Now with release 1.2 we have added a new field in the needs and offers input web forms and in the needs and offers spreadsheet templates: Postage reimbursement notes.
 - The new spreadsheet templates will be made available soon under the Input tab on the FDLP eXchange Dashboard and at the revised needs and offers templates at [FDLP eXchange Instructions - Guidance, training materials, etc at https://fdlp.gov/instruction/fdlp-exchange](#).



Changes to Upload Screen

UPLOAD OFFERS OR NEEDS

UPLOAD OFFER(S) OR **UPLOAD NEED(S)**

Upload an Existing Offer or Offers

Lists limited to 250 items and must be in CSV format. See [Instructions for Converting XLSX to CSV](#) for help with lists created in XLSX format.

CSV only

Choose File No file chosen

IMPORT FILE

Download Import Template and Examples

[Download Needs Import CSV Template](#)

Use the templates above to create offers in a spreadsheet.

- New shipping lists templates only available in CSV format will be available soon from this page and at [FDLP eXchange Instructions - Guidance, training materials, etc.](#)



Changes in FDLP eXchange 1.2 (cont.)

1. Imitate / Emulate Function: This function allows GPO user support staff to see what another user sees in the system while logged into their own account.

- For example, if depository library staff contacts GPO's Outreach and Support staff regarding an issue encountered using FDLP eXchange, this function will allow the GPO staff member to see what the depository library staff member sees in order to better diagnose the issue.



Changes in FDLP eXchange 1.2 (cont.)

2. Bulk Processing: Previously, the only functions that FDLP eXchange could perform in a bulk action are (1) uploading spreadsheets of offers or needs and (2) passing or requesting offers from a regional's selectives in the Regional Review queue. This enhancement added bulk processing options for certain status changes (such as Mark Discarded) and for marking offers in search results and requesting them in bulk.



Changes in FDLP eXchange 1.2 (cont.)

2. Bulk Processing (cont.): Only Regional and Selective Administrator account holders can perform these actions. User account holders cannot execute any bulk actions.

1. Approve Items for Submission: Submit Selected Items/Delete Selected Items
2. My Exchange > My Offers: Mark Selected Items as Discarded/Mark Selected Items as Mailed/Mark Selected Items as Kept
3. My Exchange > My Needs: Remove Selected Items/Mark Selected Items as Received
4. Needs and Offers Repository > Offers: Request Selected Items
5. [Only Regional does this] Review offers > All Offers for Review: Requested Selected Items/Pass Selected Items/Disallow Selected Items



Changes in FDLP eXchange 1.2 (cont.)

3. Shipping List Dates: The Shipping List Date / Receipt Date field is no longer a required field for offers. It is recommended that selectives provide this information when possible to help the regional determine whether retention requirements have been met, but the field is no longer required.

- “None” (without the quotation marks) can be used in spreadsheets when there is no data for this field.



Changes in FDLP eXchange 1.2 (cont.)

4. Drop-Down List of Libraries in “Filter by Library”

Filter: Where these filters appear, only libraries with current offers/needs in the system appear in the list.

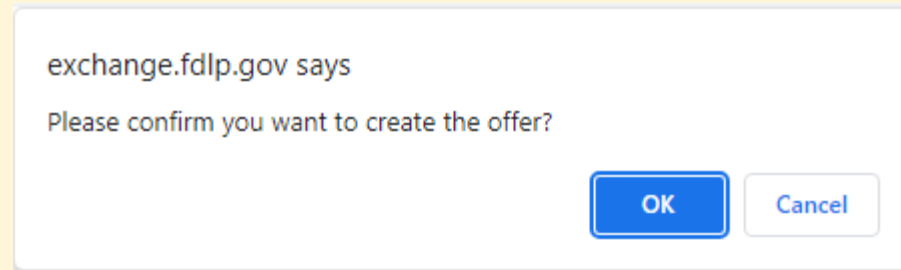
- The library names used in this filter is in the new “Display Name” field in your library account. These names were copied from the “Library Name” and can only be edited by GPO. Libraries can still edit their Library Name in their library accounts, but the Display Name field is used anywhere in the system where a library name is displayed.



Changes in FDLP eXchange 1.2 (cont.)

5. Please confirm you want to create the offer/need?

Function: This enhancement prompts users to confirm that they wish to submit an offer or a need when submitting an offer or need manually.



Changes in FDLP eXchange 1.2 (cont.)

6. Sorting and Filtering in Mobile View: This enhancement will allow mobile users to sort or filter on the same field that can be sorted or filtered in the desktop view.



Changes in FDLP eXchange 1.2 (cont.)

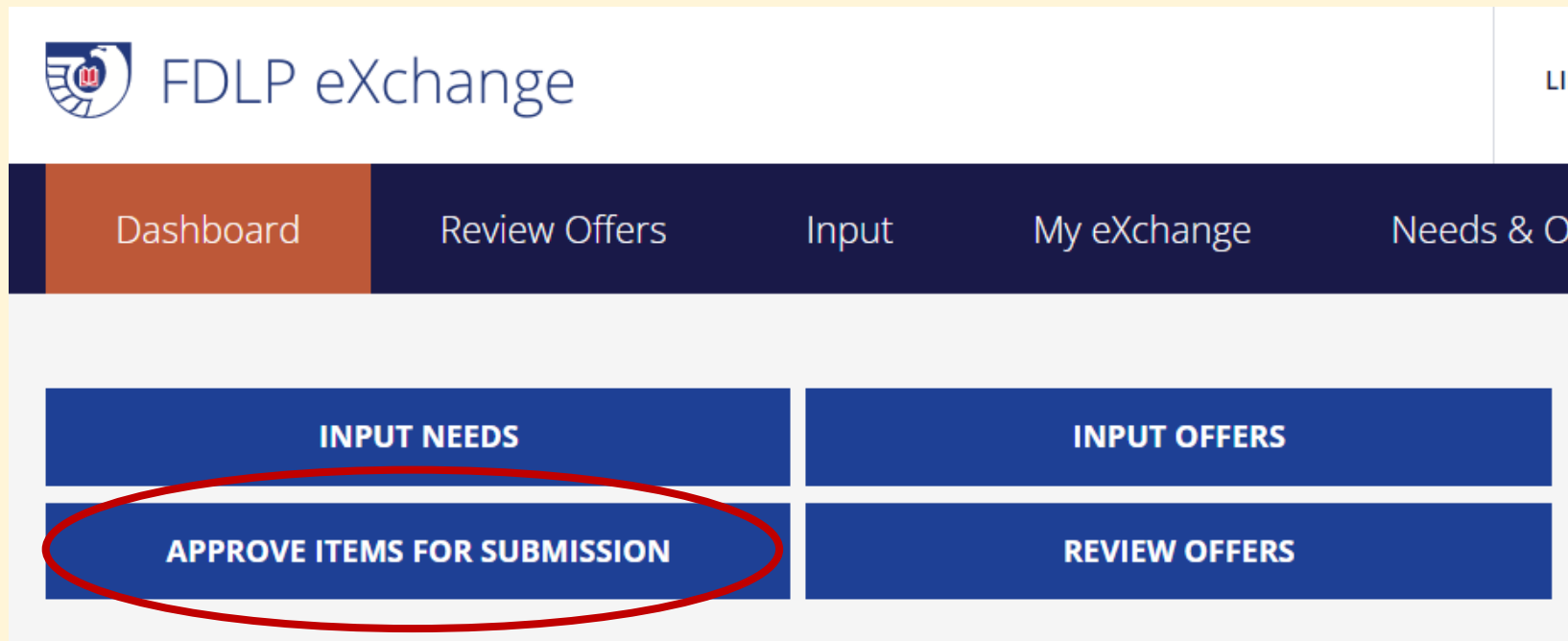
7. Push Review Period Changes from Regional to Selectives in the Region: Regional and selective review periods under the My Library tab now update when the regional updates a review period. Previously, the information on regional and selective review periods shown there only updated when the selective updated their library information.



Changes in FDLP eXchange 1.2 (cont.)

8. Site Language Consistency: The language used throughout the site was reviewed for consistency and updated as needed.

For example, the button for a library administrator to go to the page for reviewing needs or offers entered by a library user used to say “Submit Items for Review,” while the drop down menu under “Library Account said “Approve Items for Submission,” even though both went to the same place. Now both places say “Approve Items for Submission.”



Changes in FDLP eXchange 1.2 (cont.)

9. Postage Requirement: The Postage Requirement field has been updated to include three options: “Yes,” “No,” and “Sometimes.” A Postage Notes field will be added to include notes when “Sometimes” is selected.

“Postage reimbursement” is now a required field. “Postage reimbursement notes” is not a required field. Users should use the new templates that include the new “Postage reimbursement notes” field. However old templated will upload IF the “Postage reimbursement” field is filled in (enter “Yes”, “No”, or “Sometimes” [without quotes])



Keeping up with eXchange

Details about FDLP eXchange development will be shared via FDLP News Alerts.

See the FDLP eXchange Application Development page at <https://fdlp.gov/project-list/fdlp-exchange-application-development> for details on releases.



Demo of End-to-End Process

Demo of Regional Administrator dashboard, Selective Administrator dashboard, and Selective User dashboard



Questions?

Please put your questions into the chat.



Additional Questions & Comments

- Joe Paskoski, jpaskoski@gpo.gov
- Donald Sensabaugh, dsensabaugh@gpo.gov

Additional questions for GPO staff? Contact us using [askGPO](#).

A recording of this webinar will be made available in the [FDLP Training Academy Repository](#).

