


# Regional Discard Policy

Past, Present and Future


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## Agenda

- Introductions
- Regional Discard Policy Overview
- The New Needs and Offers Tool

2




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## Introductions

- Libraries have asked for an automated tool for processing Needs and Offers
- GPO outreach to ASERL regarding their tool
- Issued contract to Confluence to develop the tool
- Developing FDLP eXchange
- Phase 2 of development includes adding requirements for Regional Discard Policy to application

3



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## Introductions - Confluence

- Deborah Ben-Moshe
  - Project Manager
- Confluence
  - Founded in 2001, Confluence is a woman-owned business headquartered in Washington, DC
  - Expertise in open-source software

4



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## Regional Discard Policy Overview

- Policy implementation will require way to track copies and a way to process discard requests
- Discussion with test libraries will help determine requirements
- Showing the application as it is currently being developed to show how it may be used in implementation of Regional Discard Policy

5



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## The New Needs and Offers Tool

### ***FDLP eXchange***

A new application created just for FDLP that automates the Needs and Offers process, allowing libraries to digitally list, review, request and process offers and needs.

6




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## Benefits and Features

- User-friendly
  - Easy to use interface
  - Upload a list directly from a library's catalog in xls, csv or MARCXML
  - Mobile ready means documents can be manually entered directly or lists reviewed from anywhere
- Automated workflow
  - The entire process is automated
  - One-stop-shop for the entire process
- Matching
  - Matches needs with offers to alleviate some of the manual work




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## Benefits and Features (cont.)

- In-site communication tool
  - Can complete all transactions using the in-site communication tool
  - All transactions are recorded as reference for later
- Potential for unlimited expanded functionality
  - The expectation is that this application grows and changes over time
  - A phase 2 is already being prepared




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## Dashboard

- Welcoming entry to the application
- Easy to access any function of the application
- Prioritized based on the group logging in




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## Inputting Offers and Needs

- There are 2 ways to input offers and needs:  
Manually or via upload
  - Upload a list from catalogue system or one created by library
  - Manual list creation
- There are a small handful of required fields
- Immediately creates a record and tracks the document's interactions with the site
  - All offers and needs live in one place in perpetuity
- Mobile input allows to input from anywhere




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## Offers and Needs Lists

- Can view all of your own needs and offers, past and present
- Can also view a Repository of needs and offers that are currently open to your library
- All lists allow for filtering and sorting as well as advanced searching




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## Matching

- When a need or offer has a match, both parties will be notified
- Uses specific parameters to match documents as closely as possible but will room for flexibility
  - SuDoc is primary matching field
  - Title and publication date are secondary matching fields
- View matches side-by-side to see if they are what the requestor is looking for




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## Regional Review Process

- By making this process digital, it should ease a great deal of the burden on the regionals to review lists
- Review by list or view all items from all libraries at once to more easily group documents for review in the stacks
- Mobile views are specifically designs to make this review process easier




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## Acceptance of Offers and Needs

- Simple click of a button allows a library to request an offer
- Even if there is no match, an offer or need can be requested from the Repository
- Requesting an item sends a notification and will also lead the requestor to the in-site communication tool
  - Just like an email inbox
  - Messages can indicate a specific offer/need or be used to discuss multiple documents
  - All messages groups as conversations so no message in a chain can get lost
  - Messages appear to all members of the library staff so everyone can be a part of the correspondence




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## Phase 2

- The application is being built with the intention that it will continue to grow in a phased approach
- As the system gets used, feedback will inform changes and enhancements that need to be made
- The next phase will include some enhancements as well as adding the Regional Discard policy to the process



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## How This Impacts You

- Streamline processes
  - One stop shop
  - Less item-by-item review
- Improve communications
  - Won't have to depend on email
  - Allows colleagues to collaborate on requests
- Facilitates relocation of materials to where they are needed
  - Will become more important as regional discard policy is implemented
- Logistics
  - Roll out late summer/early fall





## Next Steps

- Post-meeting feedback
  - <http://www.fdlp.gov/needs-offers-tool-feedback>
- Testing
  - In June we will be conducting user testing
- Launch of FDLP eXchange
- Requirements gathering for enhancements to support regional discard process