

FDLP eXchange

Managing Discard Processes

November 18, 2016





Project Goals

 Create an application that automates the Needs and Offers process, allowing libraries to digitally list, review, request, and process offers and needs.

Application will be user-friendly, utilize an automated workflow, match one library's needs with another library's Offers, facilitate communication regarding transfer of materials, provide flexibility for future expanded functionality.



Project Timeline

- Discovery completed, December 2015
- Initial site design completed, April 2016
- Initial development completed, July 2016
- •GPO internal testing completed, July 2016
- Beta test with 29 depository libraries, September 2016
- Additional development
- Targeting Spring 2017 launch



Differences Between Interfaces

Selective Interface

Regional Interface

LOG OUT LOG OUT FDLP eXchange **FDLP** eXchange LIBRARY ACCOUNT HELP LIBRARY ACCOUNT HELP Input List Review My Offers My Needs My Matches Needs & Offers Repository My Offers My Needs My Matches Needs & Offers Repository Dashboard Dashboard Input INPUT AN OFFER **REVIEW A LIST** INPUT A NEED CONTINUE A LIST INPUT AN OFFER CONTINUE A LIST Needs & Offers Repository My Offers Needs & Offers Repository Mv Offers Current Offers Cultural landscape report for Roger Sustainability of Maine's groundfish There are no results for most recent Current Offers There are no results for most recent Williams National Memorial : past offers in your library. industry : field hearing before the past offers in your library. Earning a failing grade : a report card Earning a failing grade : a report card Providence, Rhode Island Subcommittee on Oceans. ALL MY LIBRARY'S PAST OFFERS O Atmosphere, Fisheries, and Coast ALL MY LIBRARY'S PAST OFFERS O Prescription drug programs for older Ame Prescription drug programs for older Ame Mortgage modifications during the Guard of the Committee on foreclosure crisis : hearing before the Commerce, Science, and ALL CURRENT OFFERS ALL CURRENT OFFERS O Committee on the Judiciary, United Transportation, United States Senate States Senate, One Hundred Eleventh One Hundred Tenth Congress, Congress, first session, August 20, second ses 2009, Providence, Rhode Island Current Needs Current Needs Atlantic salmon genetics and ALL MY LIBRARY'S CURRENT OFFERS O breeding research with Atlantic Area agencies on aging and the Older Area agencies on aging and the Older Salmon of Maine LLC annual report Americans act : selected results from a survey Americans act : selected results from a survey completed by more than two-thirds of the completed by more than two-thirds of the ALL MY LIBRARY'S CURRENT OFFERS O Nation's 555 area agencies on aging, Nation's 555 area agencies on aging, Mv Needs conducted December 1977-January 1978 conducted December 1977-January 1978 : survey / by the Select Committee on Aging, U.S. survey / by the Select Committee on Aging, U.S. House House My Needs Navy medicine in Vietnam : Passage There are no results for most recent to Freedom to the fall of Saigon Abuses and disruptions of the elected farmer past needs in your library. Abuses and disruptions of the elected farmer committee system : report together with committee system : report together with Navigating troubled waters ALL MY LIBRARY'S PAST NEEDS O There are no results for most recent There are no results for most recent minority views of the Subcommittee on minority views of the Subcommittee on current offers in your library. past needs in your library. Administration of Farm Programs of the Administration of Farm Programs of the ALL MY LIBRARY'S CURRENT NEEDS O Committee on Agriculture and Forestry, United Committee on Agriculture and Forestry, United ALL MY LIBRARY'S CURRENT NEEDS O States Senate, Eighty-fourth Congress, second ALL MY LIBRARY'S PAST NEEDS O States Senate, Eighty-fourth Congress, second



My Library Account

 Allows regional to set review periods for the region. This includes the timeframe for them to review selectives' offers, as well as for selectives to review offers from other selectives in the region.

Allows all libraries to choose whether to offer materials nationally after they have been through the region. If a library chooses to offer materials nationally, they can set the timeframe for how long the materials will be offered.

User Accounts

 Every library has an administrator for their library.
 This is generally the depository coordinator, but someone else can be designated.

Additional user accounts for each library allow other users to enter needs or offers into the FDLP eXchange to be reviewed by the administrator before they are published. Publishing offers pushes them to the regional for review.

Add user accounts on your library's My Library Account page.



My Library

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			OCLC Symbol	
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,	Ubrary AdministratorLibrary User	9999A GPO Selective A		BetaSelectiveK1@123gmail.com

Add New Offers / Needs

 Online templates allow users to type in new offers or new needs. There are a few fields that are different, so there are separate templates for offers and needs.

Users can upload an Excel (.xlsx) spreadsheet, a comma separated values (.csv) file, or MARC xml.

 Administrator reviews new offers and needs before approving them. Offers and needs can be edited or deleted during review.

Manual Entry

 Online templates allow users to type in new offers or new needs.

Required fields are marked, and "check for errors" feature highlights omissions.

Multiple pieces" allows users to enter a range of publications, such as a serial, in a single entry.

Save and Duplicate" function allows users to enter multiple, similar items (such as issues of a serial), separately without retyping.



Add A New Offer * Indicates required field Document Title * CHECK FOR ERRORS Classification * SuDoc Classification Other Document Number Does This Offer Contain Multiple Pieces? * (eg., multiple volumes, issues, etc.) ◎ Yes ● No. Publication Date * Start Date * (only year is required) ✓ Day Month v End Date (Frange) Month Day v Item doesn't have a date Date Received by Institution / Shipping List Date * mm/dd/yyyy

I don't have a date

Format

- Paper
- CD-Rom
- Microfiche
- OVD 0
- Floppy Disk
- VHS Tape
- Braille
- Other

Postage Reimbursement Available?

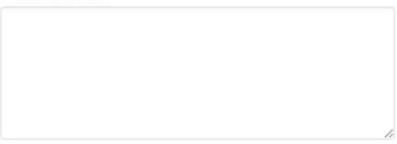
◎ Yes ® No

Condition *

See Definitions for explanation of condition parameters

- Fine
- Good ©
- ◎ Fair
- Poor

Condition Notes



CHECK FOR ERRORS



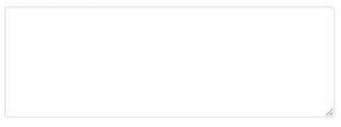
This document is available electronically

OCLC

CHECK FOR ERRORS

CGP System #

Additional Notes



Internal Notes

(These notes will only be seen by your library's users)







U.S. GOVERNMENT PUBLISHING OFFICE | Keeping America Informed

Spreadsheet Upload

 Templates and sample spreadsheets provided to assist users in creating spreadsheets to upload offers or needs.

Field-matching function allows users to verify that spreadsheet fields are uploading into correct database fields and correct if necessary.

Review screen highlights entries with missing required field data and allows for correction before submitting the spreadsheet.

FDLP eXchange SAVE FOR LATER SUBMIT FOR REVIEW 1 errors present. Complete your import of: training9999_offers1.csv Match your document's columns to the correct available fields -Classification Title Document number Multiple pieces Multiple pieces note Multiple Pieces? Title ~ Classification Type Classification Number Multiple pieces note ~ ~ Publication start Publication end Shipping Date Format Postage reimbursement Postage reimbursement? * Publication start Publication end Shipping Date Format Condition Condition notes Download address OCLC CGP Condition Condition notes Download URL ✓ OCLC CGP System # ~ Notes Internal notes Internal notes Notes ¥

	Title	Classification Type	Classification Number	Multiple Pieces?	Multiple pieces note	Publication start	Publication end	Shipping Date	
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	Methods for estimating the magnitude $\boldsymbol{\epsilon}$	SuDoc Classification 🗸	119.42/4-2:2010-5137	🗊 Yes	Multiple pieces note	2010		1/12/2011	
	History of street gangs in the United Sta	SuDoc Classification	J 26.38:4	🛛 Yes	Multiple pieces note	2010		9/25/2010	
	In Katrina's wake : the National Guard or	SuDoc Classification	D 12.2:K 15	🗎 Yes	Multiple pieces note	2010		5/5/2010	

Regional Review

- Selectives' offers sent to regional for review.
- Regionals can request, pass, or "disallow."
 - Disallow is for things that shouldn't be offered. There is a place to give a reason why it was disallowed.
- Reviewer can click check-boxes next to offers and request, pass, or disallow selected items, allowing bulk processing of items.
- Offers that match the regional's needs are noted to alert the reviewer of the match.

My eXchange

 Users can review their library's offers or needs in one place.

Allows users to check status of offers and where they are in the review process (i.e., regional review, selective review, offer nationally).

 Highlights offers matched to another library's needs or needs matched to another library's offers.



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Matches

 Users can review their library's offers that have matched another library's needs or their library's needs that matched another library's offers.

Interface allows users to see their library's offer next to the matched need to compare. This also allows users to see their library's need next to the matched offer.

 Users can request matched offers / needs through the interface.



x

O BACK TO ALL MATCHES

Your Need Has Been Matched

Matching Offer

Document Title Document Title Lorem Ipsum Dolor Sit Amet

Offered By Offering Library Name

Document Type Federal

Suboc Classification 129.88/6:M66/2013

Publication Date 05/07/2001 - 06/09/2001

Date Received by Institution/ Shipping List Date 09/17/2003

Paper

Postage Reimbursement Available? Yes

Condition Good

My Need GO TO NEED PAGE O

Document Title Document Title Lorem Ipsum Dolor Sit Amet

Needed By My Library Name

Document Type Federal

SuDec Classification 129.88/6:M66/2013

Publication Date 05/07/2001 - 06/09/2001

Format

Paper

Postage Reimbursement Requested? Yes

Acceptable Conditions Good Fine Very Good Fair

Repository

The repository allows users to review other libraries' offers and needs.

 Users can request another library's offers through the repository.

Users can see another library's offers when they are eligible to request them.

Users can identify another library's needs that they could fill.

Users can keyword search for more subject-like access to materials.



🧭 FDLP eXchange	LIBRARY	ACCOUNT	HELP		9			
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All Needs All Offers	Keywords							
Search by Keyword/Title	Search by Classification			MORE FILTERS	5 AD	VANCED SEAR	КСН	
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Title	Classification	Published	Format	Posted	l Sta	itus		
Navy Medicine in Vietnam + See Additional Information	D 221.2:V 67/7/pt.7	1970	Paper, Microfiche	11/17/20	16	n gress	VIEW	
Navy Medicine in Vietnam + See Additional Information	D 221.2:V 67/7/pt.8	1971	Paper	11/17/20	16	n gress	VIEW	
Health Inquiry + See Additional Information	Y4.In8/4:H34/7/pt.7	1954	Paper	11/17/20	16	n gress	VIEW	
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Communication Tool

 In-site communication tool allows users to communicate with users in other libraries about materials they want to request.

 Communications with other libraries are accessible with all users from the same library, allowing for collaboration or follow-up by other users if the initiator is out of the office.

Email and notification options set in My Library allows each library to determine when to receive emails and notifications.

Mobile Friendly

The application has mobile views, allowing users to view needs and offers on a tablet or cell phone.

 Mobile option allows users to take a mobile device into the stacks to check for items on their shelves.
 Users can request or pass on items directly from the stacks if they have a wireless connection.

 Mobile views can also be seen on a laptop or desktop by shrinking the browser window until the mobile view appears.



Demo at Fall 2016 Depository Library Council Meeting and Conference, Arlington, Virginia

https://www.fdlp.gov/2016-depository-library-councilmeeting-and-federal-depository-library-conference

- Click "Archived Conference Recordings" button.
- Choose "Shaping Discard Practices and How They Affect..." under the "Fall 2016 DLC Meeting & FDL Conference: Making It Happen Together: Demonstrating Results" header.
- Click "Begin recording." The demo begins at about 10:00.
- You may have to install a plug-in to view the recording. There is a temporary plug-in you can use if you don't have admin rights on the computer you are using.



Comments or Questions?

Project web page https://www.fdlp.gov/project-list/fdlp-exchange

Comment form <u>https://www.fdlp.gov/needs-offers-tool-feedback</u>