



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

Regional Interface

You are logged in as: 9999 GPO Regional [Log out](#)

FDLP eXchange LIBRARY ACCOUNT HELP  

Dashboard **Input** List Review My Offers My Needs My Matches Needs & Offers Repository

REVIEW A LIST INPUT AN OFFER INPUT A NEED CONTINUE A LIST

Needs & Offers Repository

Current Offers
Earning a failing grade : a report card
Prescription drug programs for older Ame
[ALL CURRENT OFFERS](#)

Current Needs
Area agencies on aging and the Older Americans act : selected results from a survey completed by more than two-thirds of the Nation's 555 area agencies on aging, conducted December 1977-January 1978 : survey / by the Select Committee on Aging, U.S. House
Abuses and disruptions of the elected farmer committee system : report together with minority views of the Subcommittee on Administration of Farm Programs of the Committee on Agriculture and Forestry, United States Senate, Eighty-fourth Congress, second

My Offers

Cultural landscape report for Roger Williams National Memorial : Providence, Rhode Island
Mortgage modifications during the foreclosure crisis : hearing before the Committee on the Judiciary, United States Senate, One Hundred Eleventh Congress, first session, August 20, 2009, Providence, Rhode Island
[ALL MY LIBRARY'S PAST OFFERS](#)

My Needs

Navy medicine in Vietnam : Passage to Freedom to the fall of Saigon
Navigating troubled waters
[ALL MY LIBRARY'S PAST NEEDS](#)



My Needs

There are no results for most recent past needs in your library.
[ALL MY LIBRARY'S PAST NEEDS](#)

There are no results for most recent current offers in your library.
[ALL MY LIBRARY'S CURRENT NEEDS](#)

Selective Interface

You are logged in as: 99998 GPO Selective B [Log out](#)

FDLP eXchange LIBRARY ACCOUNT HELP  

Dashboard **Input** My Offers My Needs My Matches Needs & Offers Repository

INPUT AN OFFER INPUT A NEED CONTINUE A LIST

Needs & Offers Repository

Current Offers
Earning a failing grade : a report card
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[ALL CURRENT OFFERS](#)

Current Needs
Area agencies on aging and the Older Americans act : selected results from a survey completed by more than two-thirds of the Nation's 555 area agencies on aging, conducted December 1977-January 1978 : survey / by the Select Committee on Aging, U.S. House
Abuses and disruptions of the elected farmer committee system : report together with minority views of the Subcommittee on Administration of Farm Programs of the Committee on Agriculture and Forestry, United States Senate, Eighty-fourth Congress, second

My Offers

Sustainability of Maine's groundfish industry : field hearing before the Subcommittee on Oceans, Atmosphere, Fisheries, and Coast Guard of the Committee on Commerce, Science, and Transportation, United States Senate, One Hundred Tenth Congress, second ses
Atlantic salmon genetics and breeding research with Atlantic Salmon of Maine LLC annual report
[ALL MY LIBRARY'S PAST OFFERS](#)

My Needs

There are no results for most recent past offers in your library.
[ALL MY LIBRARY'S PAST OFFERS](#)

There are no results for most recent past needs in your library.
[ALL MY LIBRARY'S PAST NEEDS](#)

There are no results for most recent current offers in your library.
[ALL MY LIBRARY'S CURRENT NEEDS](#)

There are no results for most recent past needs in your library.
[ALL MY LIBRARY'S PAST NEEDS](#)



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 FDLPeXchange 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

Library Name

GPO Selective Depository Library 1

Parent Institution of Library

9999A GPO Selective A

Mailing Address 1

empty

Mailing Address 2

empty

Street

101 Main Street

City

Chicago

Postal Code

60601

ZIP Code

60641

Offer Nationally?

Yes

Time to Offer Nationally

30

ID

1332

OCLC Symbol

empty

Depository Library Number

9999A

Depository Type

Selective Depository Library

Library Type

Academic General

Shared Regional?

No

My Regional

GPO Regional

Timeframe Allowed for Region

0 days

Timeframe for Selectives in Region

5 days

User Accounts

	User Status	Name	Phone	Email
	Library Administrator/Library 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)*

Month



Day



End Date *(if range)*

Month



Day



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
- DVD
- Floppy Disk
- VHS Tape
- Braille
- Other

CHECK FOR ERRORS

Postage Reimbursement Available?

- Yes
- No

Condition *

See Definitions for explanation of condition parameters

- Fine
- Good
- Fair
- Poor

Condition Notes



This document is available electronically

CHECK FOR ERRORS

OCLC

CGP System #

Additional Notes

Internal Notes

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

SAVE FOR LATER

ADD TO LIST & ADD
ANOTHER ENTRY

ADD TO LIST &
DUPLICATE THE ENTRY

FINISH LIST & REVIEW
ENTRIES

✖ Clear Form



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.

1 errors present.

SAVE FOR LATER

SUBMIT FOR REVIEW

Complete your import of: training9999_offers1.csv

Match your document's columns to the correct available fields

Title	Classification	Document number	Multiple pieces	Multiple pieces note
Title	Classification Type	Classification Number	Multiple Pieces?	Multiple pieces note
Publication start	Publication end	Shipping Date	Format	Postage reimbursement
Publication start	Publication end	Shipping Date	Format	Postage reimbursement?
Condition	Condition notes	Download address	OCLC	CGP
Condition	Condition notes	Download URL	OCLC	CGP System #
Notes	Internal notes			
Notes	Internal notes			

1 errors

Title	Classification Type	Classification Number	Multiple Pieces?	Multiple pieces note	Publication start	Publication end	Shipping Date
Determination of baseline periods of re	SuDoc Classification	I 19.42/4-4-2010-5106	<input type="checkbox"/> Yes	Multiple pieces note	2010		9/15/2010
Methods for estimating the magnitude of	SuDoc Classification	I 19.42/4-2-2010-5137	<input checked="" type="checkbox"/> Yes	Multiple pieces note	2010		1/12/2011
History of street gangs in the United Sta	SuDoc Classification	J 26.38:4	<input checked="" type="checkbox"/> Yes	Multiple pieces note	2010		9/25/2010
In Katrina's wake : the National Guard o	SuDoc Classification	D 12.2:K 15	<input checked="" type="checkbox"/> 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.



You are logged in as: GPO Library Administrator Logout



LIBRARY ACCOUNT
HELP SECTION

Dashboard
Review Offers
Input
My eXchange
Needs & Offers Repository
Advanced Search

In Progress Items
My Offers
My Needs
Offers I've Requested from Repository

Search by Keyword

Search by Classification #

Filter by Status

All Statuses

All Statuses

Pending Approval

Denied Items

All Cancel Status

Incomplete

Available

Requested by Request

Requested from Repository

Matched

Match Requested

Match Complete

Past Items

All Past Status

Matched

Transferred

Added to Discard

Discarded

Discontinued

Expired

Class # Filter

+ ADD BY CURRENT YEAR

Title	Classification #	Phase	Count	Actions
<div style="display: flex; align-items: center;"> + <div> <p>Lorem ipsum Dolor Sit Amet Consectetur Adipiscing</p> </div> </div>	123.555/1665/20	Pending Approval	1	ACCEPT WITH REJECT WITH
<div style="display: flex; align-items: center;"> + <div> <p>Lorem ipsum Dolor Sit Amet Consectetur Adipiscing</p> </div> </div>	123.555/1665/20	Final Review	1	ACCEPT WITH REJECT WITH
<div style="display: flex; align-items: center;"> + <div> <p>Lorem ipsum Dolor Sit Amet Consectetur Adipiscing</p> </div> </div>	123.555/1665/20	Matched	2	ACCEPT WITH REJECT WITH
<div style="display: flex; align-items: center;"> + <div> <p>Lorem ipsum Dolor Sit Amet Consectetur Adipiscing</p> </div> </div>	123.555/1665/20	Discarded (Not)	1	ACCEPT WITH REJECT WITH
<p>Published: 10/25/2010</p> <p>Format: Paper</p> <p>Condition: Very Good</p>	<p>Document Type: Fiscal</p> <p>Date Received by Institution (Shipping Lead Time): 12/17/13</p> <p>Package Description (Request): No</p>	<p>Available Electronically?</p> <p>Number of Copies Being Offered: 2</p> <p>Additional Notes: Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nam in magna et orci, ac bibendum ante. Nulla quis, in vestibulum magna et quam imperdiet, in vestibulum turpis.</p>		
<div style="display: flex; align-items: center;"> + <div> <p>Lorem ipsum Dolor Sit Amet Consectetur Adipiscing</p> </div> </div>	123.555/1665/2013	Requested from Repository	3	ACCEPT WITH REJECT WITH
<div style="display: flex; align-items: center;"> + <div> <p>Lorem ipsum Dolor Sit Amet Consectetur Adipiscing</p> </div> </div>	123.555/1665/2013	Matched	2	ACCEPT WITH REJECT WITH



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.



[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

SuDoc Classification

I29.88/6:M66/2013

Publication Date

05/07/2001 - 06/09/2001

Date Received by Institution/ Shipping List Date

09/17/2003

Format

Paper

Postage Reimbursement Available?

Yes

Condition

Good

My Need [GO TO NEED PAGE](#)

x

Document Title

Document Title Lorem Ipsum Dolor Sit Amet

Needed By

My Library Name

Document Type

Federal

SuDoc Classification

I29.88/6: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.



All Needs

[All Offers](#)

[Keywords](#)

Search by Keyword/Title

Search by Classification

[MORE FILTERS](#)

[ADVANCED SEARCH](#)

Sort [Posted \(Newest First\)](#) ▼

View By Items

View By Lists

[EXPORT](#)

Title	Classification	Published	Format	Posted	Status	
Navy Medicine in Vietnam + See Additional Information	D 221.2:V 67/7/pt.7	1970	Paper, Microfiche	11/17/2016	In Progress	VIEW
Navy Medicine in Vietnam + See Additional Information	D 221.2:V 67/7/pt.8	1971	Paper	11/17/2016	In Progress	VIEW
Health Inquiry + See Additional Information	Y4.In8/4:H34/7/pt.7	1954	Paper	11/17/2016	In Progress	VIEW
Health Inquiry + See Additional Information	Y4.In8/4:H34/7/pt.8	1954	Paper	11/17/2016	In Progress	VIEW



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-council-meeting-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

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