

# Quick Start Guide for Regionals

The screenshot shows the FDLP eXchange dashboard. At the top, there is a navigation bar with 'Dashboard', 'Review Offers', 'Input', 'My eXchange', 'Needs & Offers Repository', and 'Advanced Search'. Below this is a main content area with several sections:

- 1** INPUT NEEDS / REVIEW OFFERS (left sidebar)
- 2** My In-Progress Items (center, showing 0 offers pending review and 2 needs pending review)
- 3** Items for Regional Review (center, showing 12 items from 1 library)
- 4** New Items in the Repository (right sidebar, showing 33 items as of May 24)
- 5** Recent Messages (right sidebar, showing 27 unread messages)

Each section contains detailed information about specific items, including titles, classification numbers, and library names.

**22** Notification—ONLY visible to you

**20** In-Site messaging system—Contact other libraries. Is visible to everyone at your library

## 1 Quick Start

- Links to manual input (Needs & Offers)
- Link to review offers in your region
- Regional library account administrators can see the work needing their approval or regional review

## 2 My In-Progress Items

- Displays matches and requests for offers you have listed or needs you have requested
- Lists things needing your action
- Click on SEE ALL OF MY IN PROGRESS ITEMS to see anything awaiting final action to close out the transaction

## 3 Items for Regional Review

- Everything in your region being offered that has not been reviewed yet

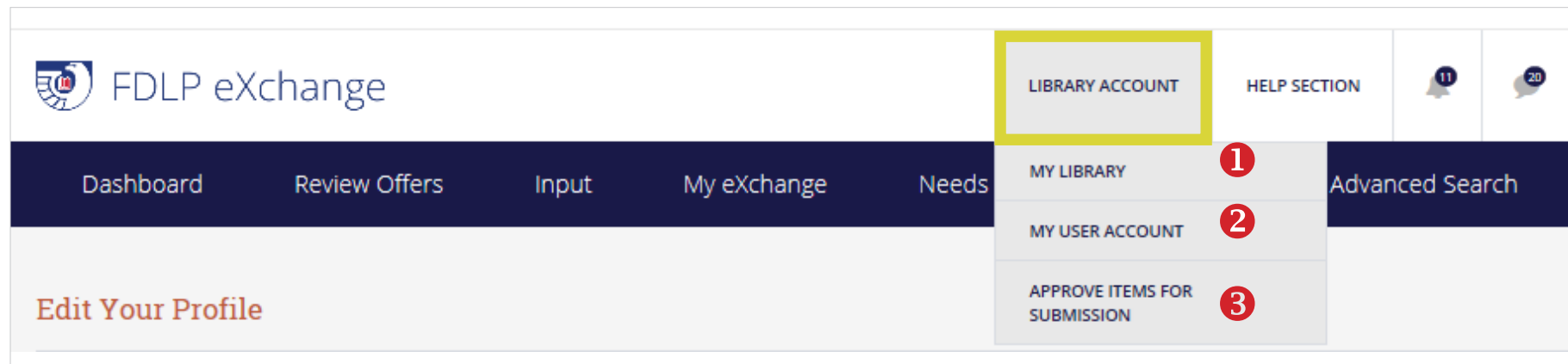
## 4 New Items in the Repository

- Needs and offers your library has access to view and request at this time

## 5 Recent Messages

- Most recently created or received messages from or for your library

**LIBRARY ACCOUNT** offers three options to manage your library's FDLP eXchange account(s)



### 1 MY LIBRARY

- View and edit the regional, selective, and 'offer nationally' review time periods
- Add or deactivate User Accounts
- Update library information

### 2 MY USER ACCOUNT

- View and edit information about your personal FDLP eXchange account.
- Set notification preferences for what you see in the notification bar and receive via email
- Change the password for your FDLP eXchange account

### 3 APPROVE ITEMS FOR SUBMISSION

- ONLY available to library's FDLP eXchange administrator
- Administrator approves needs and offers created by your library staff for submission into the Repository

**Tip**—Your username is your full email address

Review Offers allows your library to review offers from your selectives

**All Offers For Review** Search and filter by various fields to streamline the review process

Search by Keyword Search by Classification # Filter by Format Filter by Condition Filter by Library

Search [ ] [ ] [ ] [ ] [ ] CLEAR FILTERS

**Bulk Actions** Accept Selected Items [v] APPLY Check boxes below and apply Bulk Actions (Request Offer, Pass, Disallow)

Export to CSV format → EXPORT CURRENT VIEW

<input type="checkbox"/>	Title ▾	Classification # ▾	Posted ▾	Format ▾	Condition ▾	
<input type="checkbox"/>	<input type="checkbox"/> Heart Diseases ↕	Y 4.In 8/4:H 35	05/12/2017 10 Days Left	Paper		REQUEST OFFER PASS DISALLOW [ ] VIEW RELATED NEED
<input type="checkbox"/>	<input type="checkbox"/> Hospitals in Federally Impacted Areas ↕	Y 4.In 8/4:H 79/4/supp.	05/12/2017 10 Days Left	Paper		REQUEST OFFER PASS DISALLOW [ ] VIEW RELATED NEED

**Tip**—There are no truncation(s) or wildcards

The screenshot shows the 'Input' section of the FDLP eXchange website. The navigation bar includes 'Dashboard', 'Review Offers', 'Input' (highlighted), 'My eXchange', 'Needs & Offers Repository', and 'Advanced Search'. The 'Input' section has a yellow callout box with tips: 'You will have better matches if you do not input ranges' and 'You can use an Internal Note field to track your box or list numbers'. Below this are two main options: 'MANUALLY INPUT AN OFFER OR NEED' and 'UPLOAD OFFERS OR NEEDS'. The 'MANUALLY INPUT AN OFFER OR NEED' option has buttons for 'INPUT OFFER' and 'INPUT NEED'. The 'UPLOAD OFFERS OR NEEDS' option has buttons for 'UPLOAD OFFER(S)' and 'UPLOAD NEED(S)'. A red dotted arrow points from the 'INPUT NEED' button to the 'Add A New Need' callout. Another red dotted arrow points from the 'UPLOAD NEED(S)' button to the 'Upload an Existing Need or Needs' callout.

**Input New Items**

**Tips:**

- You will have better matches if you do not input ranges
- You can use an Internal Note field to track your box or list numbers

**MANUALLY INPUT AN OFFER OR NEED**

INPUT OFFER OR INPUT NEED

**UPLOAD OFFERS OR NEEDS**

UPLOAD OFFER(S) OR UPLOAD NEED(S)

**Add A New Need**

\* Indicates a required field

Document Title \*

Classification \*

(SuDoc strongly preferred for optimized matching)

SuDoc

Other

Document Number

Publication Date \*

Date \* (only year is required)

Month Day 2017

End Date (if range)

Month Day

Item doesn't have a date

**Upload an Existing Need or Needs**

Lists should not exceed 150 items.

XLSX, CSV, MARCXML only

Browse... **Browse for and upload your list (should not exceed 150 rows)**

IMPORT FILE

**Download Import Template and Examples**

- Download Need Import Spreadsheet Template **← Template available**
- Download an example of a prefilled spreadsheet (csv)
- Download an example of a prefilled spreadsheet (xlsx)

**Tips:**

- Upon import you may review and correct matched columns
- You may review and fix import errors

**FDLP eXchange** LIBRARY ACCOUNT HELP SECTION 11 20

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

**In Progress Items** **My Offers** **My Needs** **Requested From Repository** ← Content your library has requested or 'claimed'

Jump to: Offers Needs | Offers I've Requested From Repository

**Offers (0)**  
You have no offers in progress.

**Needs (3)** In Progress Items = action is needed by your library

**Tip**—The boxes around listed material in My eXchange are color-coded:  
 Blue = active, but no review or no further action is needed  
 Green = action is in progress  
 Yellow = awaiting administrative review  
 Gray = expired

**Tip**—Have a question about a listing? Message the library.

Disaster Recovery Digitization Project

ACCEPT MATCH DECLINE MATCH

ACCEPT MATCH DECLINE MATCH

ACCEPT MATCH DECLINE MATCH

**Requested from Repository (2)**

**Tip**—A "+" sign expands the entry

Classification #	Request Date	Offering Library	Status
TD 2.19:58/4	05/12/2017	New Mexico Selective Lisa1	Requested
I 28.5:994	05/12/2017	New Mexico Selective Lisa1	Match Complete

**Offers** Needs

Queue of everything being offered that your library is eligible to review and request

**Offers Repository** Search Offers Repository

Search by Keyword Search by Classification # Filter by Format Filter by Library Filter by Condition

Search [ ] [ ] [ ] [ ] [ ]

CLEAR FILTERS EXPORT CURRENT VIEW

Title	Classification #	Published	Format	Posted	Offering Library	Condition	
EPA, 1987 - 1996 Toxics Release Inventory, Landview III, Light Edition (EPA 749-C-99-003) (July 1999)	EP 5.22/2:987-96/PA CK	05/12/1996	DVD	05/12/2017	New Mexico Selective Lisa1	Poor	REQUEST OFFER
Exemption of Small Hydroelectric Power Pr.	Y 4.In 8/4:H 99/2	05/12/1962	Paper	05/12/2017	Melissa's Super Awesome New Mexico Selective Library 2	Good	REQUEST OFFER
Health Inquiry	Y 4.In 8/4:H 34/7/pt.1	05/12/2017	Paper	05/12/2017	New Mexico Selective Lisa1	Good	REQUEST OFFER
Health Inquiry	Y 4.In 8/4:H 34/7/pt.2	05/12/2017	Paper	05/12/2017	New Mexico Selective Lisa1	Fair	REQUEST OFFER

Export Offers Queue based on your search or filtering criteria

Request offers easily

Question about this offer? Message the library.

FDLP eXchange

LIBRARY ACCOUNT HELP SECTION 12 20

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

Offers **Needs** ← Queue of everything needed by other libraries

### Search Needs Repository

#### Needs Repository

Search by Keyword Search by Classification # Filter by Format Filter by Library

Search

Only Show


Disaster Recovery  Digitization Project **CLEAR FILTERS**



**EXPORT CURRENT VIEW**

Title	Classification #	Published	Format	Posted	Needing Library	
<a href="#">+ Newsprint Study</a>	Y 4.In 8/4:N 47/2/958	05/12/2017	Paper	05/12/2017	Maryland Selective 1	
<a href="#">+ Amendments to the Nurses Training Act</a>	Y 4.In 8/4:N 93/2	05/12/2017	Paper	05/12/2017	Oregon Regional 1 X	
<a href="#">+ Assistance to Nursing Education</a>	Y 4.In 8/4:N 93/3	05/12/2017	Paper	05/12/2017	Oreg	
<a href="#">+ Adjusting Rates of Overtime Compensation</a>	Y 4.In 8/4:Ov 2/2	05/12/2017	Paper	05/12/2017	Oreg	
<a href="#">+ Recovery of Overcharges</a>	Y 4.In 8/4:Ov 2/3	05/12/2017	Paper	05/12/2017	Oregon Selective 2	
<a href="#">+ International Health</a>	Y 4.In 8/4:H 34/13	05/12/2017	Paper	05/12/2017	GPO Admin	  

Question about this need? Message the library.

**Tip**—Keep an eye out for needs being requested due to disaster recovery or a digitization project

 **FDLP eXchange**

[LIBRARY ACCOUNT](#) [HELP SECTION](#)  

[Dashboard](#) [Review Offers](#) [Input](#) [My eXchange](#) [Needs & Offers Repository](#) [Advanced Search](#)

## Advanced Search

**Search all Needs and all Offers available to your library**

Enter as many fields as desired below and items that fit those parameters will appear in the results list at the bottom. You will be able to further sort and filter your search results. No wildcards or truncation symbols needed.

**Search by Keywords or Document Title**

All words  Any words  Exact phrase

**Classification #**

**Does this Offer Contain Multiple Pieces?**

Yes  No

**Publication Date**

From  To

**Posting Library**

**Date Posted**

From  To

**Date Received by Institution / Shipping Date**

From  To

**Format**

Paper  CD-Rom  Microfiche  DVD  Floppy Disk  VHS Tape  Braille  Other

**Postage Reimbursement Available**

Yes  No

**Condition**

Fine  Good  Fair  Poor

**Document Available Electronically?**

Yes  No

**OCLC**

**CGP**

[SEE RESULTS](#) [RESET FORM](#)

**Retrieve a Saved Search**

Select a Saved Search

[LOAD THIS SEARCH](#) [DELETE THIS SEARCH](#)

**Save This Search**

Enter a Name for Your Search

[SAVE THIS SEARCH](#)

**Tip**—Looking for local publications?  
Save a search performed for a keyword