Launch Checklist for Regionals

FDLP eXchange

There are some steps you will want to take to make sure that FDLP eXchange is configured for your region's use, regardless of whether your region is going to adopt FDLP eXchange for processing discards. Use the checklists below to make sure you're prepared.

Rolling out FDLP eXchange in your FDLP region? Take these steps.

- Notify GPO via web form of your intent to adopt the tool. A GPO staff member will contact you to confirm and provide account information.
- Communicate with your selectives.
  - Provide a timeline of the adoption so selectives know when their lists have to be submitted through FDLP eXchange and when they must stop using your current system.
  - Convey any deadlines for selectives to initiate use of the tool.
  - Show selectives the templates for lists so they know what to expect.
- Log into FDLP eXchange, and configure the settings for your account and for your region:
  - Set alerts and notifications for your user account.
  - Set review periods for regional review of lists and for selective review within your region.
    - If your library will be offering materials nationally after they have been offered within your region, check the box next to "Offer Nationally" and set timeframes for your library to offer materials nationally.
    - If your library will not be offering materials nationally, make sure the box next to "Offer Nationally?" remains unchecked.
  - Add any user accounts needed for additional staff who will be using FDLP eXchange at your library.
    - By default one account is set up for the designated depository coordinator as listed in the Federal Depository Library Directory.
    - Up to 5 accounts may be established at your institution. This enables support staff and others directly involved in the weeding process to access the application.
    - By default the depository coordinator is the *library administrator* for eXchange work. Notify the GPO staff member who contacts you with account information if someone else should have that responsibility. Requests for new or changed library administrator accounts must come from the depository coordinator.
    - Additional accounts established by the library administrator are *library users*. Library users have access to enter disposal lists, needs lists, and review other libraries' offers and needs lists. Please note that materials entered by library users go into a queue for the library administrator to review before they are submitted to the application for processing or posting.
- Notify selectives to set up their FDLP eXchange accounts. (Default accounts will be available for the designated depository coordinator, but additional support staff may benefit from creating an account.)
- Determine if testing is needed in your FDLP region.
- Update any procedures and guidelines you may have locally. (Be sure to check web pages.)

- If applicable, note any materials you may need in your collection as a Needs List. When another library offers the material, the tool will 'match' on your need at the appropriate stage.
- FDLP eXchange is not configured to manage the regional discard process at this time. However, regionals may use FDLP eXchange to offer secondary copies where appropriate.

<u>Not</u> rolling out FDLP eXchange in your FDLP region at this time? Take these steps.

- Communicate with your selectives.
- Log into FDLP eXchange, and configure:
    - Alerts and notifications for your user account.
    - Whether and how long to offer your library's materials nationally.
    - Set the regional review period and the selective review period for your region to 0.
- Even if you are not using this tool for your region's process, you can note any materials you may need in your collection by entering Needs for these materials. When another library offers the material, the tool will "match" on your need at the appropriate stage.
- Update any procedures and guidelines you may have locally. (Be sure to check web pages.)
    - Note that the National N&O List has been replaced by the "Offer Nationally" portion of the workflow in FDLP eXchange. Selectives in your region may wish to use FDLP eXchange to offer materials nationally after they have been through the process within your region.

Regionals in ASERL and others using FDLP eXchange for secondary processing:

Regions using the ASERL tool or continuing existing processes may choose to use FDLP eXchange for secondary processing.
- ASERL libraries may wish to use FDLP eXchange to offer materials that remain unclaimed after going through the ASERL process to libraries outside ASERL.
- Similarly, libraries in regions that continue existing processes at this time may wish to use FDLP eXchange to offer materials that remain unclaimed after going through their regional process to libraries outside their region.
- ASERL libraries and other libraries not using FDLP eXchange for primary processing may also choose to post Needs in FDLP eXchange to be notified if other libraries are offering those materials.

In these cases, the regional should follow the steps listed under "Not Rolling out FDLP eXchange" above. Contact GPO if you have questions about how you should set up configuration for your region in FDLP eXchange.