

Launch Checklist for Selectives



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

Take these steps if your region is implementing FDLP eXchange

- Contact GPO via [web form](#) for your login information.
- Log into FDLP eXchange, and configure the settings for your account and for your library:
 - Set alerts and notifications for your user account.
 - Update the settings for offering nationally based on your library's preferences.
 - If you are not going to offer materials nationally after they have been offered within your region, make sure the box next to "Offer Nationally?" remains unchecked.
 - If you want to offer materials nationally after they have been offered within your region, check the box next to "Offer Nationally?" and set a time period for the number of days you would like to offer the material nationally.
 - Add any user accounts needed for additional staff working in 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](#). This is your *library administrator*.
 - 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 FDLP eXchange work. Notify the GPO staff member who contacts you with account information if someone else should have that responsibility. Requests to change or add library administrators must come from the designated 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.
- Update your local withdrawal procedures. (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 - Note that the "National N&O List" has been replaced by the "Offer Nationally" portion of the workflow in FDLP eXchange.
- Participate in any local testing that your regional may coordinate.
- Input any materials you may need in your collection as Needs. When another library offers the material, the application will match your need at the appropriate stage in the workflow.

Take these steps if your region is not implementing FDLP eXchange but you want to offer materials nationally or post needs

- Contact GPO via [web form](#) for your login information.
- Update your local withdrawal procedures.

- Note that the National N&O List has been replaced by the “Offer Nationally” portion of the workflow in FDLP eXchange.
- Log into FDLP eXchange, and configure:
 - Alerts and notifications on your user account.
 - Make sure that the box next to “Offer Nationally?” is checked and set the number of days that you want to offer materials nationally.
 - Note that you should be following your regions procedure for offering within the region, so if you do not wish to offer materials nationally, you would not need to enter them into FDLP eXchange.
 - Create any additional user accounts needed by staff at your library.
 - By default one account is set up for the designated depository coordinator as listed in the [Federal Depository Library Directory](#). This is your *library administrator*.
 - 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 administrator for the library’s eXchange work. Notify the GPO staff member who contacts you with account information if someone else should have that responsibility. Requests to change or add library administrators must come from the designated 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.
- Enter needs for 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.

Libraries in regions using the ASERL tool:

Libraries in regions using the ASERL tool 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.
- ASERL libraries and other libraries not using FDLP eXchange for primary processing may also chose to post Needs in FDLP eXchange to be notified if other libraries are offering those materials.

In these cases, selectives should follow the steps listed under “Take These Steps If Your Region Is Not Implementing FDLP eXchange” above. [Contact GPO](#) if you have questions about how you should set up configuration for your library in FDLP eXchange.