Please stand by for realtime captions.

>> Hello, everybody, we will be ready to go in about 10 minutes. Thanks.

>> Doing another sound check, we will get started in about another five minutes.

>> Good afternoon, welcome to FDLP eXchange Training for Selectives. My name is Kelly Seifert. With me here today is Melissa's Fairfield and also Lisa Russell, who is here to help answer your questions at the end of the session. Before we get started I am just going to walk you through our number house -- normal housekeeping tools. If you have questions with them in the chat pox at the bottom right hand of the screen.

>> Box at the bottom right hand of the screen. I will keep track of those and at the end we will go through questions. We are recording today's session and everyone registered to attend today will receive a copy of the recording in your email either late today or sometime tomorrow. We will also be sending user to begins -- certificate of participations. If there's anybody watching today that hasn't been self registered send us their name, the name of the webinar, and their email address and we will get them certificates as well. You can send that to FDLP outreach at GPO.GOV. Once I'm done I will put that in the chat box so you have it. If you need to zoom on what's being shown by the presenter you can click on the full-screen mode. If that is available at the bottom left corner of your screen. Once you are in that mode and you want to exit back to default view just hover your mouse over the blue bar that you will see at the very top of your screen and you will have the option to return to this view. With that I am going to hand it over to Melissa, who is going to get us started.

>> Good afternoon, everyone. I want to share my screen and go through the eXchange with you. Lisa, as he or she is our resident expert so she might jump in with a few things. As I'm going through --. Welcome, Lisa, if you have questions type them into the box and we will get to them at the end.

>> I am going to share my desktop with you now. What you should be seeing is the FDLP eXchange Training for Selectives login page. I am starting here and let you know we are using the training site because we do have a training site and a production site. That is the actual real site we would like to use the training site so everything that we put into here -- none of it is actually going out to the public this is the site you use to play around with things to test things out and to try the site out. We do have a webinar that was done a few weeks ago. One of the difference between the training site and production site it was recorded. If you are interested you could go take a look at that on the Academy page and I will give you more details about that.

>> The system login page -- we set up accounts for our administrators that are depository coordinators. Your username is your email as it is in the directory. You will choose your own password. Normally you will type your email here, request new password and instructions will be emailed to you about how to set up your own password. Occasionally we are finding that sometimes they get caught in spam filters or junk folders. If you don't get the message when you request a password check those and if you still don't get them for what ever reason shoot us an email. The email address will be up in a little bit. We can reset that for you on the back end. I also want to let you know that there are two kinds of accounts. Administrator accounts and user accounts. I will show you a little bit about that once we get in. We set up all of the administrators as the coordinators. If you want someone else to be the administrator or you want additional administrators also shoot us an email and let me know and we will set that up for you. I

am going to go ahead and log in here. I am going to start with the library account because that is where you look at your library account and your personal account. I am logged in as an administrator. If I was a user you would not have approved items for submission here. Otherwise it will look pretty much the same. I will just talk about that a little more when I get into it.

>> I am going to go to the library account and this is the account for all of your entire library. Everyone who has access to the eXchange will be able to see this page. This is where you have information about your library, who your users are, and that sort of thing. I'm going to start here because if you have a library user, you can actually add advents. If you don't want them to be administrator you can do that yourself a library user would be somebody who is allowed to enter the needs and offers but they don't go to the regional without your approval. That is the biggest difference between administrator and user. A user would be maybe a student worker, maybe a staff person who you want to do the work of entering things and but you want to look at everything they do before you actually send it to your regional.

>> To add a user you simply add the user here. There username -- we suggest always using your email address as your username. In our system we've had people go in and change it. The system will let you go in and change it but it makes it harder to find you. Sometimes it messes up your password and it harder to get those fixed and working properly if you don't use your email address. It is definitely the per weight to do it. -- Preferred way to do it. Into your email and password and then you can enter the site. If you want another person on the staff who can do administrative functions you will have to have it do that on the backend and we are glad to do it. All you need is an email from the coordinator. You can do it through FDLP outreach. We need to verify it comes from the coordinator and then we will set that up for you and --. They will be able to do all the things that you can do.

>> Here you edit your library information. You will put your library name, and paired institution. It's important that we have both in there because it makes it easier for people to find you. If you're public it's not going to work so much.

>> It's actually the library name field that appears in the drop-down when you are filtering by library. We discovered when we launched the original training site back in October, some libraries were like University of Hawaii because they couldn't find ourselves in their system because there library name was library and there were 30 other libraries in there. We combined the names to make it easier to find people. It does look redundant when you are looking at the screen but that is why it is there.

>> You can also put in your address so people can find you. Very important here is whether or not you want to offer nationally. When you first put an item and it's going to go to your regional for their review. They set the time for that. Once that passes it goes to all of the selective's in your region and they have a certain amount of time that they get to review everything. Once it passes through those phases you can choose to offer it nationally to everybody. That is entirely up to you. The regional will select the time periods for regional review and selected review. Whether you offer nationally and for how long is entirely up to you. This is where you opt to do that. Our default is to not have you offer nationally. If you want to you have to go into here in your account and click the button to offer nationally. You choose how long you want those to be up there and that way they will stay in the system and they will be visible to people outside of your region at that. -- Time.

>> Next you have your user account. These are individual accounts for each user. You can put in your name, and this is where you change your password if you wanted to do that. This is also where you set your settings. Emails, notifications. We have a list of things that you could be notified about. Some people want to be notified about everything, some want to be only notified about a few things. You select what you want to be notified about and whether you wanted through email or on the site. You can choose both or neither whichever you prefer. If you are getting notifications through the site you would get it up here it would light up like the mailbox on AOL and you will know you have notifications. On the training site right now we don't have messaging and notifications turned on on the training site because we were afraid it would get too confusing if you have messages coming from the live side. You won't get emails from the training site but you could get on-site notifications there.

>> We have things like do you want to be contact when you want to discard something, when original toes you you have to keep an offer, those types of things. You just go through there and decide what it is you want to know about it and what you would rather not be notified about. That is your library account.

>> On here what you are going to get is approved items for the mission. This is the difference between user account and administrator. Once a user or student worker who you need to monitor their work once they put an item in this is where you would look at it to make sure everything is right and you do indeed want to send that to the regional. I took the liberty of putting something in ahead of time. This is what it would look like. The student put this offering. You can take a look at it and say this is great or this is something we really want to offer our don't want to keep. If you realize you have multiple and you want to offer both of them you can copy and create a new offer from it. Submit that and the form comes up and you can offer it two times now.

>> If you decide this is not something I want to offer it was a mistake you would just market as kept and it doesn't go. Once you hit it and use it -- and you send it it will go.

>> We are going to move on to the dashboard. This is just where you can see highlights of what's in there. Any matches or offers that you have. You get a quick view. If you just want to check the site real quick you can kind of see if there's anything major.

>> There are two ways to upload offers. You can do it manually or you can do it by uploading a spreadsheet. I am going to -- I want to show you this for inputting an offer. I had a manual one but I Artie offered it because it was the one I just gave you. I'm going to copy that again. If you want to match it has to be a sue dock. Publication date. If we don't have a publication date you just click item doesn't have a date. You could do month, day, year, or you could just put a year. That's entirely up to you. Similarly if you have a shipping date you can use that or you can say you don't have a date. It's not required. It's supposed to automatically put an Asterix there.

>> It seems to kind of change back and forth. I am working with the contractors on that.

>> If you're doing it manually and you don't have a shipping list date just click I don't have a day and you will have to accept that it's eligible for discard. It's more than five years old or they duplicate copy. Some way that it is eligible. It will ask you to format. Post reimbursement is not a required field. Some people can pay postage some people can't. Yes, or no, is a question for the offering or meeting library. The person who is filling this out. You are not asking you only want the ones that other people can pay

postage. It's not required. If you have a situation where I can pay postage in state, I can pay postage up to $10, you can still check yes, and come down to the note field and say I could only do the postage up to $10 or something like that.

>> You want to put in the condition of the book. Fine, good, fair, poor, if you have questions it will give you definitions and it will open up in a new window so you don't have to toggle back and forth. If it is in good condition except it. You can check whether it is available electronically that way somebody can take a look at it and if they're not sure they want the item they could take a look to see if that's what they want. If you check that you could put the URL here. These are other things that we ask for they are optional and not required. It might help people decide if they want the item or not. Check for errors. Want to see the green checkmark it means everything is good. Submitted and the need her offer will be put into the queue. -- Submit it and the need for the offer will be put into queue.

>> There are a few differences between needs and offers. Most differences are what required. You don't actually have a book in your hand and with an offer it can be specific. Sometimes you don't really have a desire for that format you can check as many formats you want. For needs you can indicate whether you want it for digitization or disaster recovery. Some people will browse and search for things like that. Check for errors. I want to point out that there are a few differences there.

>> The other way to get needs and offers is the system spreadsheet. I'm not going to go into too much detail on how to create the spreadsheet because we actually have one August 23 we are doing a webinar specifically about that. We will go into more detail there. I will show you a little bit about what you do here. You just upload an existing offer. We do have templates here for offers. We have them for needs as well. That shows you what kind of information you are supposed to have a spreadsheet. They are a little finicky. Things have to be a specific way in there. I am going to upload an offer spreadsheet. I have these preset already. Just choose the file and import it. It looks like mine has five errors in it. If you have problems in your spreadsheet it will point them out to you. If there are fewer than 250 in your spreadsheet. If there are more than 250 it will just upload the ones that work and it won't give you this page where you can go in and correct the errors you will have to figure out what the errors were. You have to fix them and upload them again. As you can see we have an error here. I am going to show only the entries with errors. All the entries that were okay won't show here. It tells you the exact problem you can go in and edit. It looks like there was no shipping day here. I am going to put 2010, here.

>> It disappeared once you corrected it.

>> This one is the condition I did not have a condition in there and I also didn't -- wait a minute. That one was fine. This is my second webinar today I'm getting ahead of myself a little bit. Classification of the format is wrong. I put paper in there instead of paper. -- Piper in there and set up paper. Classification number I put 1899 in there. That is not correct and I don't have it with me right on hand so I'm not sure what it is I'm going to save it for later I'm just going to remove that from the list because it had an error and I don't know how to correct it at the moment. Classification type, I put the wrong thing in here. I know for a fact I put super dock in here. It is very specific as to what you have to fill out and how you have to fill out each spreadsheet. I will show you how to find that information so you can look at that and do it the correct way. I know it has to be sue dock. There are no errors now. I'm going to submit them. There we go. I look in my exchange offers. Everything from the spreadsheet is here. This is a match. This is matched with my regional. I would accept that match and then once it matches and once the regional accepts the match we will work together and she'll let me know how to send and where to

send it and I will mark it as mailed. You can message the library. It will pre-fill who it is to and you don't have to worry about that.

>> Here is another one that there was a match with my regional but I decided I wanted to keep this one. I thought I wanted to get rid of it but the other copy was not in really good shape. I'm going to mark that it's kept. Your needs, work the same way. I'm going to come back to my request. The repository -- if you are in my exchange you are only going to see your own items you're not going to see anything that belongs to other people. Those are your needs, and your offers. The reptile story -- repository will show you everything that is available to you. Everything that regional passed on in your region. Anything that is in national needs and offers and has passed through phases one and two. Anything you see in the repository is something you can request. When I go back here my request is going to show the request you have made. This is something you can browse, you can decide whether you want it or not and request it from the library. Somebody might have a need. You have an extra copy and he does happen to put it in it will go through a regional review and the other library.

>> Here we just have a few things and request the offer. It works the same way as a match. It will notify the other library that somebody has requested the offer and you can make arrangements to transfer the items back and forth. You can filter by library if you know it was a thick library -- specific library that has a subject area that you are interested in. Look at the items they discard. If you are in the needs repository you can select disaster recovery for digitization and look at what people need for disaster recovery. You can filter by library as well.

>> We have the advanced search. This will make it to where you can search your items and other items. You won't see something from other cities. You only see it once it's available to you. You don't have to worry if it's something you can get or not. If it is in there it should be available. You can search needs, you can search offers. You can do subject searches. If there is something that you collect heavily and something you're very interested in I always type in Congress because it is always a lot of stuff in here about Congress. You can put in specific numbers. If you don't want anything multivolume you can click no, here. You could check by particular libraries. You could only show the results for your region lead take a look at what your library has out there at the moment. And the results it will give you everything that's available to you at the time. Open it up and take a look at it. That is a known bug word is saying it's not available and contractors are working on fixing that right now. You can save the search. I will save this one off Congress. If this is something you are always on the lookout for you will be able to save the search and run it once a week or once a month or however often you want to do it. To run it you just -- take it out of here, load the search, and that will load all of this for you. It will fill in all the fields you had filled in before you saved it and then you click, see results and it will pull everything up again. You can do that as often as you want to do. You can sort things by title, when it was posted, who the library is, also you can export any view that you have and you can do this for most things here. This will give you a spreadsheet of whatever the current view is that way if you're looking at people's needs you can export the current view and take it into your stacks and the for items or that sort of thing. It's another tool to help you manage your collection.

>> That is the advanced search and it works for needs and offers as well. It's one of the problems I have when I start to use this. I will try to search offers when I have needs clicked. You have to remember to go back between them both because they are different. I always have that problem. I have to catch myself. We also have a help section and this we are working on constantly. People are asking questions

and we are always adding information in here. If you have a question check here and if not always contact us because we are getting a lot of questions. This is new for everybody. We are happy to answer them. You can go into ask GPO and contact me directly. I don't mind. We will do our best. If you see things not working like they are supposed to let us know. We are working with the contractors to fix all of that. If there is something you would like to see it do that it doesn't do we are taking that information and looking at them for future enhancements. We definitely want to hear your suggestions. We love to hear about your suggestions for future enhancements. Is there anything else you would like to add, Lisa? I will open up for questions now.

>> I asked for a general worker account as we change workers annually and I would like for them to enter information but only with my approval.

>> You can definitely do that. Go into your library and add a user. If you have a general student worker email you would put it in here. Add a password and give that password to everybody that has that email address. You can deactivate and delete library users easily. If you deactivate your student worker because they're going away for the summer you would deactivate it and when they return in the fall, re-activated. You can delete and add new users. You can add as many of these as you want. It's easy to change them or you can do a general one.

>> It does require an email address. Sometimes it gets tricky. If you notice the email address Melissa, used for this one is a Gmail account. We can give her another account with her same email address. The email can only be in there once. If you need to set up a Gmail account to give yourself a generic email for the students you could do that.

>> I noticed there is a URL in the document is available electronically does it mean you need to also put in materials that we are superseding as well?

>> Work with regional on that. If you're substituting electronically that might be something you need to offer through your region.

>> We are starting reservations -- preservation's. It could be something that one of those reservations -- preservation's need.

>> We do ask for a system number electronically. This is to have other libraries. If it is available electronically it's up to your region. They will decide the policy as far as what can be discarded and what needs to be listed. That's not changing this is just a better tool to use. Regionals are still in charge of discarded policies in their region. I would talk to your regional. Some people have clicked item doesn't have a date, and in the notes they are saying electronic substitution approved and that sort of thing. Work it out with their regional definitely.

>> Could you switch the offer nationally on and off depending on the item or list you are uploading?

>> No, is always on are always off. I think of it as when you're in a parking lot where they have spikes that you can go out over -- when you go from phase 1 to phase 2 there is a gate. Between phase II and phase 3 of something is Artie expired -- already expired and you say oops, I want to offer that nationally it's not going to move it back to phase two.

>> Any change you make it's going to impact whatever is in that state at the time you make the change did --.

>> Are we submitting individually or a batch load?

>> You could do it both ways they both go to your regional.

>> Keep in mind -- we have always worked with a list and we're kind of getting away from the list because once it goes into the system if you have 100 items in the list in the system it's 100 items. They all go their separate ways at that point. Are the items on the offers list automatically deleted after a certain time frame? Speak --

>> They are not deleted we keep them for statistical purposes. We are looking at ways to archive them. It is going to build up and there is going to be a lot of them. We have three phases. When you first enter something in it's going to go to phase 1 regional review, sin is your regional passes on it or requests it or disallows it, it automatically goes into phase 2. Other libraries in your region can then look at it. The regional sets a time period for that. After 15 days it's been sitting in phase 2 and nobody wants it, then you have chosen to select go national it will go into phase 3 if not it's going to let you know it's okay to discard it should you can market as discarded --. You can then mark it as discarded.

>> No longer active. Is exchange intended to -- eXchange intended to replace [inaudible]?

>> That is up to regional. We do have ways of your state is not using eXchange we can set it up so we can operate nationally. You will need to contact us so we can do that for you on the back end. As far as processes and procedures for discard it's up to regional.

>> Is it possible to limit subject searches using a date range?

>> Yes, you can do that here.

>> Are we creating practice examples are due offers need to be real?

>> For the training site they are for practice. The production site is the live site. That is where the real needs and offers are. We set up the site so you can have a place to test things and see how things work. Regionals go in and test how things will work in there. You can practice all you want in the training site.

>> I believe that's all the questions. How much longer will we have to access the training site?

>> We don't have any plans to take it down at this point. This gives us a place to do hands-on training.

>> Any other questions.

>> If you offer nationally and neither side can pay for shipment is there any plans for federal money for that purpose?

>> We have talked a little bit about in some cases. At this point I think the only thing that is fully approved is that we will pay for postage if it's going to a preservation Stewart. I don't know the details about that. You will have to contact our preservation Stewart on that.

>> There is an email address for that. We are not aware of any -- but we wouldn't necessarily.

>> Do you want to put up the contact information?

>> Yes.

>> Any other questions?

>> Here is our contact information. I am also going to type in my email address. Contact me directly it's fine. Don't all do it at once.

>> [Laughter]

>> We are happy to help. We know this is something new and we expect there to be a lot of questions and suggestions. We need some good suggestions about what you would like to see in the future. I suspect there will be more as we use it. We love to hear about all of that. We want to hear about it.

>> The slides will be available.

>> If you joined us late you will be receiving a recording to this webinar in your email.

>> Thank you, all very much. Let us know if you have questions and we really do appreciate your time. Thanks.

>> [Event concluded]