Please stand by for real-time captions.

Good afternoon everyone and welcome to the first training session for the FDLP exchange. Before we get started I'm going to welcome you -- walk you through a few housekeeping matters. If you have any questions or comments, feel free to text them into the chat box in the right and of your screen. I'm going to keep track of the questions that come in and at the end Lisa would respond to each of them. We are recording today's session and will email a link to the recording and any other information that we provide you today to everyone who registered for the webinar. If you know folks who missed today's session they're going to receive a link as well as long as a registered. Will also be sending you a certificate of participation using the email that you used to register for today's session so if anyone needs additional certificates because multiple people are walking -- watching the session with you, include the names of those who need to certificates in an email to us.

If you need to zoom in on a slide of the site being shown by the presenter, you can click on the fullscreen button on the bike -- bottom left hand side of the screen. If you want to exit that mode, mouse over the blue bars that will appear on the top of your screen and click on the return button. With that I will hand it over to Lisa Russell will get us started.

Hello everybody into thinking churning with us. Hello everybody and thank you for joining us. We've got a lot to cover today and this will be the dashboard that you will get when you first log in. If you need more information on how to login there is a video on that included with the materials that we sent out to you last week. You can get them by going to FDLP.gov.

When you go there you should see an alert on the project for FDLP exchange. If you go to the project page scroll down you'll see it listed including one on getting started which includes logging in. We will pick up from that point right now. Once you have logged in, this is the dashboard you are going to say, one of the first things you want to do is go to the my library account and make sure the information is correct.

You'll see your library name, library information. There are 15 days for the regional review in 10 days for the selective review. Whatever you set there will apply to your region and yourself. You have the option of not offering nationally for changing that from yes to know. If you do offer nationally you have to put in a time period for that. To do that, the development tap is something that's going to go away so go to the edit tab and scroll down to edit the information. If you need to change the library name or the address or anything like that you can do it here. Scroll down to the regional review and this is the time period you have to review the offers from your selective. If I thought 15 days is and to be enough that I wanted to change it to 30, I do it there. I want to offer nationally so I believe this check. If I did not I unchecked that box. I'm going to put it out for national for 15 days.

Once I have made my changes I will go ahead and save. This is something that means the site is working and will be hidden and we go live.

Scroll down and you'll see national review is 30 and selective is 15. If I scroll down further, you can see here's library administrator and a lot that person -- I logged in as that person. At that student workers in there as well. Everything will get reviewed and approved before it gets sent to the site.

Put in their username and email address is the username. Obviously we're using the state email address here. You will use your email address. I'm going to copy and paste that to make sure I don't make any typos and then I will put in my password. You want to look over here to see the strength of the password. Now I have a strong password and want to retype it to make sure I have it right.

I can put in a title. I can put in a phone number or secondary address here if I want to but those are optional and then going to click on add user. You can see now I have added that. You can have up to five users per library. If you want more than one library administrator for your library you can do that just let us know because we would have to change the permissions on that. You can do that by doing what I just did in notifying us that we need to change permissions for that one or you can just email the information to us and tell us that you need a second person at it at the library administrator and we can do that for you.

That is how you add accounts. If you want to edit your information in the account, go back to the library account, my user account, and if I want to change the name I can do that here. If I want to add a secondary email, it's not required. If I were leaving in a new person were coming in and I wanted to put them in here I can do that by editing the username/email. You can contact us and we can walk you through it to make sure it works correctly. If you want to change your email address you have to use your password to do that. For name change you don't need your password.

This is also where you put in your notifications. Anything on-site that notification is something you will get in a site and no point that only get back to the directory screen. The email is something you will get in email. You can choose which ones you want to get. Anything that says roundup, instead of getting one for each time someone enters something, you'll get everything entered over a day.

I'm going to save my changes.

Now I'm going back to the dashboard. Anytime you want to get back to the dashboard, you can just click on dashboard over here. If you set notification within the site, you'll get that here. It's pretty much like you would see on Facebook. You also have a messaging tool here which I will try to get to later. This is where you would go to review offers from you selective. You can also get to those using the buttons here. These take you to the manual font to enter directly into the system. If you go to input it also gives you the option of uploading spreadsheets of offers.

Might exchange shows everything that you have in the system -- my exchange it's a repository of what everybody has in there. These buttons here, most of the rest of dashboard things that we put here to help you get into things directly and more likely. These are things we thought would be used quite a bit so you have a direct link.

Other items for review is going to take you up to here. If you are a student worker someone in the site as a user and not as an administrator and if you wanted to approve those who would go here.

Is also tells you how many new items have been added to the repository in the past week and anything from an is a need and O is an offer. I will continue down this column and you can see the messages here. It shows you three of the most recent messages and you can also click to see the most recent messages. If I wanted to go into this message directly I could just do it by clicking on it.

Might and progress items are things that are in the system -- my in progress items -- that need someone to do something with them.

Regional review: These are the things your selective libraries have submitted. This tells me I have 20 things from the libraries. That lets you know about how much the value -- volume is.

I can also get there by clicking on review all times. This goes back to the top and takes you to the same place at the link I just showed you. We're going to look at reviewing items from your select. This is the page you get through to review items from your select. You can expand something by clicking on the + to get more information on it. It gives you the title tells you how many days you have left before the time period expires. If I wanted to send the library a message about it I can do that here. Let's say this is something I decided that -- you can request something, pass on it so they can discard it, and you can disallow if it is something you think they need to keep. If I wanted to disallow this I need to give them a reason for it so I will click the message to the library here. I'm going to put in the subject: Will notice I already populated the library that it came from, document title in classification. I'm going to tell them this is the only copy in the state so please keep it.

I'm going to send it.

They will get that message through the message tool.

You can do things individually. Now that I have sent the message to them I want to go ahead and disallow it.

I can request pass or disallow individually here in the other thing I can do is find items that I want and request this one and this one and then I can go appear and do both actions. Once I select them by checking the box I can open the file.

Here tells you that they were accepted.

I can do the same thing for offers. I can also search share by keyword, classification, phone app, I can filter by condition, library. If I wanted to look at one particular library that had a lot of stuff, I can just that library.

I can in the process those by making decisions here. The other thing I can do is download it into a CSV file. That will only show what is currently showing. If I wanted to get everything I go back to all submit and it will show everything and I then click this and it will download everything.

The same would happen if I had used a different filter, it would only export whatever I had currently filtered for.

The next thing I will show us how to input office. Click here and if you want to manual input, you can do it here. It gives you the option of doing an offer on need. I'm going to do it on need.

I put in the title. You will notice as I scroll down, the check for errors button is going to follow me. I can click on that at any time to see if it has any errors. I want to check to make sure I included all the required fields and everything is in the proper format. It does not worry about spacing but it wants to make sure you don't have two slashes which is something I would not normally see in the document number.

This is a 2010 publication. I'm going to put in the publication date. For the date I can put in the year, a month and a year, or a month to date and a year. The start date is required but the end date is not. If you are doing a monograph which is what this one is, I just put in the start date which in this case is 2010. If I were offering a range of material I put in the start date of the date of the first issue I needed and the end date of the last issue that I needed. So if I needed 19 1986 and 19 1986 and 1987 of the monthly labor review I put in January 1986 the start date in December the start date in December 19 seven for the end date. If I did not have a date I checked this part -- box. I want it in paper.

This is not a required field. In some cases you can get reimbursed.

If it was an offer you would want to put in the condition of the thing you are actually offering so this case it would only be one option for the condition. In this case, since we really asking for a condition you would accept, you can click on any condition or if you wanted anything except something that was in poor condition, you would like this. If you need an explanation for what the condition is, click here and it will take you to the other page that describes the conditions.

I'm going to go ahead and put that in as fine, good, fair.

I do not need this for disaster recovery some going to leave that is no. If I wanted to put in notes I could do that here. Internal notes field is something that will only be seen by your library. You might want to put a note and to remind you which box it is in while waiting for disposal. Once everything is filled in, check for errors. See here got a green checkmark which means I don't have any errors so I can now click submit.

I want to start over or want to review it, the middle button allows me to dissipate it so if there was a newer or older edition, I could click that. Be there was a 2000 Be there was a 2008 edition of this. You can see that I created a new record with the same information in. This was 2008 so it changes the location date. Maybe that one was not in paper but came out on microfiche some going to put microfiche there. You can pick notable formats. I'm going to put any condition on this one.

Since I'm currently logged in as an admin it's going to directly be published in the exchange so everybody can see it in the library. If I were to do this as a student worker, that goes into a cube for the admin to review before it goes out. I'm going to show you how to review that. Go to library account. Actually before I do that let me show you how to do a spreadsheet. If I want to upload a spreadsheet, go to input, upload offers in needs -- I'm going to put needs. Here you navigate to the files you normally would. If you scroll down you will also see there is a spreadsheet and it's one of the resources that was added to the project page. The site does not live yet but if you want to get started on some spreadsheets to upload, you can go ahead and start on those. There are different templates for offers and needs because they have slightly different fields. We want to make sure you are using the right template. I also want to make sure the note here says it should not exceed hundred 50 items. If you're doing a spreadsheet you want to make sure it is a spreadsheet of 150 rows or less. If you have more than 150 you can do multiple spreadsheets.

Going to navigate to the file that I want to upload. I want to upload my needs of that file and that I will click import file. One thing I'm going to do before I start with errors as I'm going to click here to make sure my columns in my spreadsheet match to the right fields. If something did not match correctly, like maybe if I had a different name on title I could do that there. Once I have verified that those are all correct I will close that up.

You can see anything that has in error will have a red bar to draw attention to it. This one looks like it's the condition issue. The other thing I can do if I only want to look at the things that have errors is I can check this box and will take everything that does not have errors out of the list so it will help me to process this quicker. Now I'm going to click edit item on the top one. This one was missing a format. So I need to go down here to the format and I will click paper and save item. Now you notice this one looks like condition so I will choose fine and good on that one. This one has all the required information now. I know there is one error. Click on this one. This is something that did not meet the standards of the clatter -- classification. It does not have a letter to start out with. I'm going to put my cursor in the correct field and add the letter I and then save items.

Now you see there are no errors why can check that box.

It says your input was completed successfully.

If I was entering that as an admin it would go directly into the system.

I'm not going to do any offers in the interest of time. If that document type and if you have Library of Congress, it's better to use two docks. It asks if you have multiple pieces. Put in the

start date is the first issue you are offering and end date as the last issue you are offering. The day it was received by the institution goes there. If you don't have the shipping list date or the date it was received, check this box and there is a disclaimer that says I don't know when I got it but I know I have had at least five years or it's a secondary copy or it's eligible for substitution. It basically says yes this is something that meets the requirements for offering. You can do that if you don't have a date on something that you want to offer. In this case you're only picking one. If you have notable formats, -- multiple formats, I fill that in. Conditions again, check on the condition that you have in hand. Condition notes, you can put in the notes like if you had 10 items and nine are in good condition, you could put a note that says for example this February condition was in poor condition. Or whatever. If something is available electronically and you know where it is, you can click that and put in the URL. It helps someone who is reviewing it to decide whether they want to accept it or not or if they would want an electronic version. Again, the internal notes with only be seen by your library.

If you got someone entering things at the library user, the only permission so let's take a look at that. It's a lot like the review offers that we should before. These are all needs. You can filter by format, submission etc. If I only wanted to see offers, I could click there. It's blank now. If I wanted to see both I could do that.

For the filter I have bulk actions or delete. You can download in the CSC format for whatever was shown. I can scroll through to take a closer look at them. If it looks good I can submit to the repository. This is a student worker. I'm taking a quick look at everything and I'm going to check the box to check everything. Now those have all been published in the site.

The next thing I will take a look at my exchange. Here you can see you have my office, my needs, request for the repository, any items that have actions needed. Anything that is green is something that needs action. If it is blue, it's going through the system. Great me -- gray means it's been run through the system.

Items requested from the repository, these require some action. Statuses tell you if something you requested has matched, you will see that. If I want to take a look at the match, this one is not showing the match because it was already accepted. You can see here, match is complete.

If I want to look at my office, I clicked there and it will show me my office. We have a lot of test data in here. Simple titles are in here. Here it tells you if it's something that is still being reviewed by regional, let's say phase 1, if it's something the regional has passed on for the time period has expired, it will be in phase 2. If it is something you don't get to before it expires, you can look at it and it -- and requested while it is in phase 2. If it is something that is expired as being offered nationally, that would be an ace three.

The needs are fairly similar. Here we have doctors and immunization. The Red Cross box here means it's for disaster recovery. Here we've got things that, the green is showing its active. Blue is it is going through the system. Gray means it has already been through the system. If you saw anything or if we had anything in here that was still on the queue to be reviewed, it would appear in a yellow box.

Again, we can accept or decline from here. We can export the current list.

Repository shows everything you requested from another library. It's filtered by status. This is something I requested in the mattress complete. -- The match was complete.

If I click there it's fun to fill in the library, document title and prosecution live -- prosecution library number. Now let's take a look at the repository.

This is the office repository and it opens in the office screen. Again, you can search by keyword, filter by library, condition etc. I can export to get the list of everything that is being offered in good condition. Take the filters off and scroll through, you can send a message.

Again, you can search by things that are needed for disaster recovery, filter by phone number of filter by library. [Indiscernible - muffled audio]

If I wanted to look for things from USGS, I could click here. These are things you can do. If I want to filter by library I can do that here. This is showing every library that has something in there.

Then we have advanced search here. It shows you how to do a search. You can see the different fields available. If I want to search for health again, here, I can choose whether or not I want all of them or if I only want things published on health and maybe the last 10 years, I can say 2007 through 2017. You're probably going to find a lot of new stuff. If somebody has a secondary copy you might find something in there that is more recent. If I want to search by posting library I can do that here. If I only want things on paper on microfiche I can click those. The reimbursement thing, I'm going to leave that. As I scroll down I will see there are three things with that information. If there were offers I see owes -- oh -- O.

I think somebody had a question the other day about whether spacing made a difference. These are all spaced consistently. The short answer is they shouldn't and in fact it actually displays about the spacing even if you don't put the spacing in there. It should not impact your search.

If I wanted to save this search, I give it a name. Then I click save the search. Now if I want to come back and search for this again, I can click on it.

If you go here, these are a list of all the saved searches that I have. After selecting one I'm going to say load search. I see now is get eye 19 and the classification. I can go here and run this again. I can also choose offers by clicking that. I can click see results to run the search again. If you scroll down we can see all the offers. So if you have something that you are doing for a particular agency, you can do a saved search in the system and come back once a week or something like that. We don't have anything set up currently that will give priority to levels that do collect in a certain area but that will be something that would allow you to see once they were in the system.

The health section is pretty standard. Let me show you the messaging system quickly. This is the messaging system and it looks pretty much like messaging and Facebook. This is something that says if there is a message queuing here or anywhere -- anyone in the library can see it. If you

were to enter an offer while on vacation and matched somebody's need, somebody else at your library could respond.

This is the one I said earlier. It's something I sent in the most recent message so that's the one that shown here. If I wanted to look at it message I could go over here and click on it.

You can also view all so if I wanted to look at things that I had more is important, I could do that there. I could also sort by classification, subject, library etc.

That pretty much shows the messaging tool. Sarah, I will go ahead and take questions if anybody has any.

We soon be able to mark items to select and have the supervisor of administration review and complete the action before the offering library receives the message?

The student does not have the ability to select. They can only enter and review.

White is there a limit of 150 items on a spreadsheet to be uploaded?

Just because -- I have uploaded a few with 150 items and it takes a little longer than expected. It just to make sure the whole thing gets uploaded and that's all the system can handle right now. We're looking to increase that fairly soon.

If after the match is received and we realize it's not what we expected can we reinstate the need?

Yes you can. You would go to "my need". This one has been fulfilled so let's give that one a try. You can copy the item here. Then you have the option of copy the item in creating a new need. Click that and click submit. Maybe you got something in poor condition and you decided it was something you really did not want. I might put something in there that says we have a copy in poor condition.

That would be uploaded and it would say you would not accept anything in poor condition. I'm going to click on submit and that will create the need.

Where would a library get a monograph found with other items?

Let's go back to the input form. I'm assuming that would be an offer because you are describing up at -- describing a condition of a particular one. I put that -- there's probably a couple of places where you could put that. You could put it in conditions field.

Trying to think of something that would have a monograph with something else with it. You might put if it was something that had supplemental materials, I probably put that in the additional notes because if it is a monograph, you don't have to title deals. You would only be able to enter the title for one of them.

In that case, you might put in the series name for the document title. [Indiscernible - muffled audio] you would want to put your start date and end date. Yes there are multiple pieces. If you click yes you could say the three pieces in the system answering that, and they are all bound together.

Can you explain the need for digitization project?

It's something we put in their, somebody at a Council meeting that something about their library did not have the resources to have digitization projects of their own. It was an attempt to help anyone doing a digital dictation -- agitation -- the sort of projects.

In that case what I think I do is find the offer. If it had a typo I would probably send a message to them and say you've got a typo in your dock and it might cause it not to get matches. Let them fix it.

Due to self checks item by item within the stacks? What a student need to work on the spreadsheet or would they be able to check the offers using an iPad directly in the exchange system.

They can actually do that. You can see what it looks like just by shrinking your browser. If I shrink my browser, you can see it switches over to the mobile version. If you had a cell phone or something, this is what you would see.

Here is the repository or if I was in the regional and it offers some of the selective, it would be here. I can do it this way. You're probably not going to be working on a cell phone. Probably in iPad -- they would probably use an iPad or a tablet. If you have Wi-Fi capability in your stacks, you can do that.

Any other questions at the moment?

[Pause]

Thank you all for attending the webinar today.

How does matching work?

If you got the [Indiscernible] number, that's going to work. If you do have a match with that number or otherwise it would match with the dates.

Any more questions?

I am putting the URL to the FDLP exchange page into the chat. You can either get there directly from the homepage. There's a large banner in the center of the page where you can go to this link directly and you will have access to lots and lots of information on educational resources including the brief videos that Lisa talked about as well.

For the videos we did the interface, one on getting started for regionals, one on getting started for selective. This one on setting your time frames and looking at your user information and on adding users. They're different once giving an overview of dashboard for regional selective and most of the rest of them are applicable to both, covering interim offer, interim need, how to create a spreadsheet, how to upload a spreadsheet etc. We also have a quick start guide to help you get started quickly. It gives you an overview of this is what this section does etc. If you want to go back and see how this might exchange work but you did not want to watch the whole webinar, you can use the short webcast to do that.

There are no other questions, that's it for today. Here is my contact information on the project page and you can always contact us through that. Or you can email me directly and I would be happy to answer any questions you have after the session.

Thank you.

[Event Concluded]

Actions | Save as Text | Save as HTML