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[Please stand by for realtime captions]

Good afternoon everyone. Welcome. I am Ashley Dahlen and with me today is Lisa Russell the senior program analyst. Before we get started I walk you through a few housekeeping items. This presentation will have a Q&A at the end, please feel free to text your questions through the webinar because I will be keeping track of them.

We are recording the session and we will email a link to the recording to everybody. We will send you a certificate of participation using the email you have used it to register. If you need additional certificates, please email us and include the title of the webinar along with the names of those needing certificates. This will be screen sharing her presentation today. When she starts to talk you will no longer see the chat box. If you want to ask a question, when she starts to share her screen, mouse over the blue bar at the top. Click on chat. The chat box can be moved anywhere on your screen.

I will go ahead and share my screen. I will start by showing you where you can get to the webpage, you have a lot of material to cover today. Go to FPLP.gov. You can see the EXchange box. This access link. -- There is an access link. Scroll down. You can see information on the project. Here we have a template so if you want to start to create lists the templates are here. There is also a data dictionary.

There are related documents as you scroll down you can see the training, the webinar Scott -- the webinar, videos, we will cover these in the weather. If there is something we don't get to, you can come back and watch them.

One of the things in getting started, it shows you how to catalog If you need to know how to login you can use that.

Here is the dashboard. I already logged in. Usually you will login with your email, user ID and password. One of the first things you want to do is go to your library account. Go to my library. And here's the library information.

Scroll down you can see your name, your address and so forth. You can see the time for regional review which the time that your library gets to review things. Select the time to review the offers and you get to choose whether you want to offer something nationally or not.

Go to the edit tab. This allows you to edit you can edit if you have a change in your library address or something like that. Here is the offer nationally box. If you do not want to offer, uncheck the box.

Think the number of days you want to offer. I will offer nationally for 15 days. I will click on save. If I post something that's an offer to the system, it will go into the queue where my regional will review Then it will go out nationally and have 15 days for other people to use it.

You can see the library accounts. You have two different accounts, the library administrator and the library user. The user is meant to be more for someone like a student worker, maybe they don't have as much experience but they are entering information. Anything they enter will have to be approved by the library administrator.

I can add another account, you can have up to five accounts. I will put in the easy -- the email address.

I will copy and paste this to make sure I have the same email address. Type in a password. Check the password strength. You want to have a strong password.

I will go ahead and use this password. Confirm your password.

The passwords match. Put in the person's name. You can add the phone number and secondary email but they are not required.

You can see it right here. You can see the new student worker. You can deactivate if you want to.

That is the library account. You can look at the user account information. Go to the user account.

Here it shows the name, the phone number if you want that, the secondary email, your username is also your email.

You want the passwords to match. If I was going to edit the email address, I want to change my password I can do that here. Scroll down, this is where you can set your account notifications. You can see all the notifications, we have daily digest and weekly digest, if you see something that says site or email, it gives you a choice whether you want to get the navigation in your email or on the site, if you choose site you will get that in the notifications.

Scroll down to see all the different notifications that are available. I will not make any changes here. Click on submit.

This should save all of the changes and this is where the notification goes. Anything that I have picked for site notifications, it will be up here where the bellows. This is the messaging tool. -- It will be here where the bell is. This is the messaging tool.

Go to the dashboard. This is the screen you see when you first login. Click on dashboard. The other menu items are input, my EXchange which has your needs and offers, and the needs and offers repository. There's also advanced search.

I will walk you through the dashboard first. We have to -- we have input needs and input offers. And sub does submit items for review. -- And submit items for review.

This shows the most recent message that we have and at the bottom you can see all the messages. The center column has my in progress items it shows you the stuff that is in progress. Anything that needs to have some action and you can see all the items by clicking here. The right column has the new items in the repository and it shows you there has been 39 new items in the past week. You can see five of the most recent ones. You can visit the repository by clicking here.

It looks like these are all needs anything that has a need -- O is an offer. I will show you how to input them offer. Go to input. You can manually input or upload. I will show you manually. I'm going to do an offer today. You can search by entering the information. We have the document title, you can also put in Library of Congress, Dewey decimal, if you are entering a range you can click here you have multiple pieces, there's the publication date if you have a monograph put the starting date, if it is the range you put in the dates of the first issue and last issue you are offering.

If you are offering 85 to 87, put 85 as the beginning date and 87 as the ending date. You can put in the fiscal year, monthly, or a month a day and a year. The start date is required but the ending date is not.

There's a space here for a shipping list, when you receive something for five years, you meet the requirement. If you do not have a date, or it is less than five years old, click on this box. It is the disclaimer that says yes I agree. Click accept. There's the format. We have a list of classes, people indicated they are different. We have a few items for postage reimbursement. We have conditions, we have definitions of the conditions.

You can read that on your own time. You are offering a particular item, you describe the item that you are offering. If you want something that is in fine or good condition, if it is in need you can enter both.

There are notes for conditions, if you know something is electronically -- if you know something is electronically available you can put that here.

The number is not required. Additional notes are not required and there are internal notes if you want to put something in there, we can go back to the top.

I will put in the title. And the SuDOC number.

I am putting in a single issue. I will put in the publication date. I can check this box also. I received this on June 10.

This is something I believe the calendar pop-up here is something that works in chrome but not other browsers. This is in paper. Postage reimbursement. We can have postage reimbursement. This is in good condition. I can put in notes. The other thing you may notice the check for Errors

but has followed me on the page. I click on that to see if I have missed anything. That will let me know if I've missed any required fields.

You can see the green checkmark means there were no Errors and I will submit that.

These bars that are here at the top are something that the system is telling us that they are working they will be hidden. Here we have a message saying the offer has been submitted. If I want to hear I can click input a new offer, I can view the offer or if I have another issue, I can click duplicate offer.

This gives me another record with the same information filled in and I can just edit that as needed. I will change the SuDOC number . I will change the date. I will scroll down, this is in fine condition. Everything else is the same. I will click on submit.

You can see it has been submitted.

Let me go back and show you how to enter on the spreadsheet. You can see the different fields. You have the title, the SuDOC number, the publication date, any desired formats, you can click on more than one. You have the postage reimbursement. I can check on any condition. If it is something that I need to replace an item that is damaged, I can mark yes for disaster recovery. And I can fill in the notes field.

I will show you how to upload offers. It gives me the offers, click here, it tells you the list should not exceed 150 items if you do, do more than one spreadsheet. It's not something that the system will allow you to do in total, it can only handle 150 in one transaction. We are trying to increase this number.

Are templates if you scroll down. This is the same template that I have showed you on the project webpage. We have a couple of examples of something that has already been filled out.

If I click on needs you can see different templates. They have different fields. I will choose the file I want to upload. I am uploading offers. You can see it has the file name listed here. I will click import.

One of the first things I want to do is click on this + to expand things. This will let me know if everything is matching. You can see it tells me the document title is matching, the type matches, I want to make sure all of these are correct. It looks they are. I will close this. If you get a large number of Errors maybe it's something that has been mismatch. So check that. This tells me there are two Errors and I have to fix them. I will scroll down and here's one. It tells me there's a problem with the SuDOC number . Here is another one. The format has been forgotten. If I have a long list, I can click here. Now it is only showing me the entries that have Errors so I can fix those.

I will click on edit item. The first one has a classification number, it looks like there is a typo. I will save the item. Now you can see there is only one error in the import. And it is the only one showing.

I will edit this. This one needs a format this was paper. I will click on paper.

Then I will save this. You can see up here there are no Errors I want to show everything. Then I will submit this.

That's how you upload the spreadsheet. The other thing I want to point out is if you have the library administrator, this is going directly into the system. To review the list, go to library account, and approve items for submission.

This is where I go to approve items. I have five items in here, I want to expand something. That gives me more information. If everything looks okay I can click on submit. I can also delete. I will close this for the moment. I can also export this way spreadsheet I can click here -- I can export this to a spreadsheet. I can click here. I can search by classification, I can filter by condition. Maybe I have three student workers and one is good, maybe I want to filter by the one who does a good job. Then I can take a little more time on the others. I have offers but I can filter this to show up first, if I want to see needs I can do that.

I can clear the filters here. The other thing I can do, I have reviewed these, I can check the boxes here and I can do an action, it's supposed to be here in the drop-down menu.

I will go ahead and uncheck the boxes and I will submit the first one to the regional. The offer has been submitted. If I scroll down, I will leave these for now. Because I want to show these to you in another place in the system.

Go to my EXchange , click on this and it goes to the progress item box. If you scroll down, the first thing will be everything I have offered. Anything in green is something that needs action. Match complete means both libraries have said they want this, the numbers here, number one beans that is something that is being reviewed by the regional. Number two, it is something that is available, the regional can still see things that are in phase 2. Phase 3 is offering nationally. If they don't see something until here, they can still requested.

Is going to see the rest of my offers I click here. -- If I am going to see the rest of my offers I can click here.

We have disaster recovery. The Red Cross means it is for disaster recovery. You cannot see icons on the same item but this is fresh data.

These have matched I either accept or decline. I can send a message to the library by clicking here. Anything that I have posted from the repository, there is nothing in the status right now.

Go back up to the top. Choose my offers. This is the same but it also has a searching option. I can search by keywords. I have water documents here. This is something that was requested from the repository. Most of these are still in review to -- most of these are still in regional review.

The repository is where everybody else has their offers somebody saw your offer, and the repository, and they requested it from there.

I can search by classification also. The green are things that are in process of being matched. The blue items are things that are going through the process but nobody has requested them.

My needs is the same as my offers. It has a few different fields. I want to see the things for disaster recovery. I can click here. I can export the current view. I have not searched by anything, this is going to download everything that is in my needs. If i want to filter by status, if I only want the matches, click on match.

This is showing the active ones. I can export this and I am only going to ask for things that are active. Nothing pending.

The other thing I want to show you, in my offers, you can see the same thing in my needs. Remember the things that the student worker put in, go to the bottom, you can see those here, they are in yellow. If I want to look at this from here I can click on this. I can review this. Everything looks good. So I will submit this to the regional.

That puts it into the system. Now my regional can review this.

We have requested from repository. This is the repository, it's not showing anything right now. My library has not requested anything. If I had things that I have requested, if they met my needs, that would be indicated.

I will show you the repository.

You have the offers top, -- you have the offers box.

This is what we saw before. These are other people's offers. I can search by keywords. Let's try water again. This shows me what is available with water in the title. I can search by classification as well. There is only one thing in the repository from USGS. I can filter by format. If I want to look at paper documents I will click on that. This has the export current view also. Go back to all formats. I can filter by library as well. This will show libraries that have offers in the system right now. It's not going to show you a list of all 1100 depositories in this list. It would to show you the libraries that have things that are active.

I can filter by conditions, if I want something that is in good or fair condition, I can take both of those. That will filter anything. If only to export this list I can do that here. -- If I want to export this list I can do that here. I can also sort by any of these headers.

We have the messaging. Let me show you needs. Pretty much the same. It is showing the needs. This is showing the needs from the library. If I only want to see disaster recovery I can click here. Same with digitization. Pretty much the same filtering and sorting. You can see we have the for libraries that have stuff in them.

If I found something -- let me go back.

I want to show you how the messaging tool works. If I click here, this opens a message with the library that is offering. It is depopulated. -- It is pre-populated. Put in the subject.

I can type in a message and I can click send. The library will get the message. Another thing, let me show you here, this is where the messages are. I can go here to respond to something also. This is like the message tool on Facebook. It is going to open up to the most recent message. If there were stringer responses it would show everything. The one thing to note, this is something anyone in your library can see. So if you have a question and somebody answers that while you're on vacation, somebody else in your library can see it to keep things moving.

You can also view if things are marked as important. You can read things that are archived or sent. You can sort by date, classification, subject or library.

That is the messaging tool. I'm going to show you the advanced search feature. This is searching the repository, other people's offers.

You can go here, I can show you what is available. Keywords are in the title. We have classification, you have the publication date range. You can search by a particular library. You can search the date that it was received. If you only want to look for paper documents you can do that. You can choose other formats as well. You can limit this to things according to postage reimbursement.

I'm going to go ahead and search by water. If I wanted to I could put in a date range. Scroll to the bottom and click see results.

It will show the me -- it will show me the results. O is an offer, N is a need.

We have the icons for disaster recovery and digitization. It tells you the library it is. The other thing you can do is -- you can save the search and there are a number of searches here already. If I am looking for USGS publications, I can do a search. If I click on this, click load this search. And here it is. If I want to run the search I click on see results. This will show me anything from USGS.

If it is something you're looking for, you can run it once a week to keep an eye on particular agency.

Click on see results. Before I can say this it needs to have a name. So I will put here water documents. Now I can click save this search. And now it is on the list.

I think we got through everything. I saw some questions.

This has been an active group. I am going to focus on the questions. I captured your comments as well. Please clarify if 30 days and 15 days are in parallel.

It's a total of 45 days. Those are set by the regional. If they decide they only need 15 days, and selective is getting 10 days, it's a total of 25 days.

Can there be more than one library administrator?

Yes. If you want more than one library administrator let us know. We will be setting him up -- we will go ahead and set things up all the ones so you're already have an account and we are setting up at the administrator but if there is a second librarian that you want to have, let us know.

What is the difference between matched and requested?

Match means it is something that if you're looking at them all for it means that the other library has a need for the same material. Requested from the repository means it has been requested from the repository or somebody has requested -- the data dictionary.

On the project page, there is a data dictionary and it tells you all the different statuses and what they mean. That's where you can go to look at the information. About the conditions, you can click here.

When inputting what if there are multiple SuDOC numbers?

If it is something where they have the same number, put in as much as you can, then maybe put in the rest of that in your notes.

Multiple pieces. You can put in the title, and if you have three of them put in the numbers in the notes section. You might even want to put a title, that can help people understand what each one of them is.

When you say yes to postage reimbursement are you saying you will mail the materials at your own expense?

If you are offering yes I will pay. Your library can pay for the postage.

When will the system go live?

We're trying to acquire the host the site for the tool itself. The contract has not been going out for bid. We think it will do so this week. It depends on that. If it goes out this week, I would estimate maybe six weeks because we have a holiday. And assuming no other issues.

Right now we're looking at probably the middle of July but I cannot say for sure.

If you click the box that shows there is an online resource available is that source have to be approved?

You can put either [Indiscernible] you can put in the URL. Just to give someone some information.

Can you have input for the Social Security on one offer?

You can enter, let me show you. This is how I would enter this. It would be on one record. If I put on record is not going to match as well. Because it is matching on the SuDOC numbers.

You can put in the same title. You can say yes you have multiple pieces. I will put in 2000, then 2001 as the second day. Enter it that way.

Why does the over form ask postage reimbursement?

That is the verbiage we have chosen. When we were talking about the requirements it was probably more a matter of if libraries cannot pay for postage.

I will share the comments about postage reimbursement. How sensitive is the system to Errors in certain fields?

We did put in some SuDOC number validation. It will make sure you have the correct SuDOC number pattern. It will look for the number, letter, pattern. It will make sure it is a valid pattern. The spacing doesn't matter although, I don't think if you have two spaces between words, I don't think it will make a difference.

Will the system allow us to enter a need?

I believe so. That something I need to research. I think the SuDOC validation -- there are so many variables. It only validates -- we need to accept something that has a letter at the beginning. Where working on the validation patterns. We sent them the active list of classes, and we sent them a random sample of 10,000 SuDOC numbers so they can look through them for valid patterns.

The Federal Register, is on a list of classes. When uploading a file as an offer we have an option.

Yes. In the spreadsheet that I have uploaded, if I said I think the system has the document number, if I just call that a SuDOC the system might not figure out those match. I did that was something I was testing. And it did not match.

If we do get the strange message what options do we have to correct things?

What I would do before I resubmit, look to see if it was submitted. I've noticed there are times when we had something when you got a Error message something actually did work. Check to see if it was in the system. And if it was not then resubmit. Let us know.

Could you elaborate on the purpose of disaster recovery and digitization?

The digitization field is there because somebody mentioned that the library did not have the resources to do things themselves but they want to help other libraries. So that is helping them identify that, disaster recovery came out of the Hurricane Katrina, when a lot of libraries lost a lot of material and had to close down for a while. It was an outgoing of support. They wanted to help those libraries. This is does not prioritize but it gives you -- the system does not prioritize but it gives you information. Some libraries have fires. You can help them. You can help them rebuild their collection.

Is the library admin repository coordinator?

If you have somebody else who is not the coordinator, you can have that person in there.

Are we going to submit the items to the regional based on the same criteria we are using now?

I was recently in Michigan. In each of the regions you will have to decide whether or not you are about this tool. If so you have to decide on the policies for using it. If the state does not adopt the tool, one of the reasons you would use the tool is so you can upload your needs so you can still make use of the tool. But you can still upload your needs. You can make use of the national office as well. It is something you have to talk about locally.

If you are planning to use this for the national offers, make sure you go through your regional process first. The database has been taken down as of June 1. Nothing can be added. There is no new content coming in.

If you have things before this tool goes live that you want to offer, you can do so.

What happens if you click on accept match?

It doesn't contact the library. Match complete. The vet says match accepted, -- if it says match accepted, you can say match complete.

[Event has exceeded scheduled time. Captioner must proceed to captioner's next scheduled event. Disconnecting at 3:03 ET]

[Event concluded]

Actions Save as Text Save as HTML