Please stand by for realtime captions.

>>> Welcome everybody. My name is Kelly. Lisa Russell is our presenter. She was a instrumental aspect of the FDLP project. She has worked to get the system. Before we get started I'm going to walk you through a few housekeeping reminders. You have any questions that you would like to ask, feel free to chat those in the box. That is in the bottom right-hand corner of the screen. We will have somebody monitoring the questions. We are also recording today's session. And we are going to email you a link to the recording after the session is through. We are also going to send out certificates of participation to the email you registered with. If anybody is watching the rub and are with you and they would also like to get a certificate. Email us and give us the name of the webinar -- person who is with you. If you need to zoom in, you can always click on the full-screen button is located on the bottom left side of the screen. Once you are in that mode and you want to exit, at the very top of your screen you will see a blue bar appear once you are in that full-screen mode. You just hover over that and you can return to the screen you see. I will hand it over to Lisa. She will get us started.

>>> Thank you Kelly. I am going to share my screen. I know we didn't do a lot of advance notice on this webinar. Since we released the application, there is one site we go to. In this case there is two sites. The production site and the training site. He wanted to do this training to discuss when you use one. You could see more information on the product page. If you scroll down you will see this box here. You can click there to go to the project page. If you want to go to the directing -- direct plea to the production page. Once this box goes away, he thinks Golden to go to projects. And when you go to the product page, go to the exchange and that will be to the product page and it will tell you some background on what we have done. There's the benefits of using it and next steps. This template, is for doing spreadsheets. You do want to make sure you're using one of the offers templates. There is a data dictionary will will help you fill out the template. And there's some related resources. That is where you can get some more information. We will be doing another couple of webinars later on. We just have not scheduled them yet. This is the production site. And I am going to click on the training site which I also have open. You can see here they look pretty similar. The training site says training. The production site did not say training. If you look at the URL, it's different. If you have have --. Any changes you have made or added additional views on the production site, you will have to add them on the training site. If you change your password in one place, you would have to change it in the other place. I am going to login. If you have real offers, you are can put them here for practice what you are going to want to put them in the production state. And we look at the production site, there is not a banner. This is something we can change. If there is upcoming maintenance, we may put a banner on either site that says the site will be down for whatever time will we do maintenance. I am going to login to the same account on the production site. You can change your password here. You can contact us and then we can set up the password. Request new password. I'm not going to do that right now. But you just put in your email and the request will be sent to your email. Any follow your instructions in the email. I am on the production site. You can see they look very much the same. You will see different numbers here. There is different data in both sites. There should be real offers and real needs. And the trading sites are going to be things people are practicing on. Let me go back to the training site. This is showing nine items for the regional. This is something that I was testing. We put in something as a select live on the training site but we did not want to do the testing on the live site and get it mixed in with the real data. So we use that here. If I go back to the production site you can settle have any in progress applications. I'm a to go back to the trading say as a refresher. I am going to show you and I'm going to login to the test library. I'm going to log out first. And login as my test library. And then I will upload some offers so you can see that as a reminder of how that works. One other difference to note with the training site is the production site emails are turned on so you can reset your password. You can get any of the notifications. On the

training site, the only email that is turned on is the only is -- is for resetting your password. I'm in a go to input and put manual offer. I did not bring an example. We will pretend this is the number. We have a start and end date. Start date is going to be the date here. The end date is required if you're doing arrange. If you are offering a years worth of Federal Register, you want to put in the first date in the start date column. At your end date could go in the end date. If you're doing a monograph, you want to put a start date believe the and deep link. If I did not have a date, I could check this box. And say this is 2010. The shipping list date is required but if you don't have one, you can click to this box. If you are sure you've had a for 5 years and it meets all the requirements to be eligible, you can go ahead and click that and click accept. And you're saying that you have met all the requirements to offer this. If you are offering something. You can put in as many offers as you want. I'm going to say yes here. For the condition, there is an explanation if you click here. That will open up in a new window, describes the new conditions. These are the conditions we're using for our programs. Back to the form. And we are going to say is in fair condition. I can put condition notes on the back. Maybe front cover is torn. So it is available electronically. I can put in the URL. If I don't know, I don't have to go out looking to make sure. You could enter it without if you don't know. There is additional notes or internal notes. So if it is something you want to put in for your library users, like some special notation on where you're keeping the stuff while is waiting to go through the process, you could put that there. Like maybe this is on the shelf in the back room. If I want to, I can check for errors by clicking here. And I have the green checkmark, that means it is okay. It is going to check that all the required fields have something in it. And it is going to check the classification to make sure it meets the standard format. It is looking for the letter,.number. It does not do spellcheck. It is just checking for if you filled in all of the areas. Once that is correct, I can click submit. My offer has been submitted. If I wanted to do a conversion, I can do duplicate offer. You can see it pulls in everything again and I could change the number and the year. Maybe this is the 2012 version. You're probably going to need to change that. Maybe this one was on microfiche. It still keeps the notes. So this is the training database and submit it. I'm not going to be messing up the real database by putting in fake data. You can see that was also submitted. I can go to my exchange into my offers. And I should see the two that I just entered. You can see it is in phase 1. If it was out to be looked out, it would be in phase 2. It would say phase 3 if it was in the national status. Wanted to export everything that is everything here. That would give me a download of everything that is here. And if it goes onto multiple pages. You can use this in progress or my needs or requests. I am not going to do that right now. So now I'm going to go back to input. And I'm going to upload a spreadsheet just as a reminder on how to do that. I'm going to go to upload offers. And choose an existing file. I have the on my thumb drive. I'm going to input the file. This tells you that this has no errors. If I do, I could edit them. They wanted to edit this one, I could do that. I am going to remove this item. I'm not going to enter it, I want to remove it. The other thing to show you is sometimes the columns may not match up. So if you check this box, the can change. I'll take this out to show you what it does. Now have a bunch of errors because it does not have data. Usually when I do that, it shows the field which will link when you make that change. But if I go back and change and match the title, that all thick -- fix that title. I can check for errors here too. I can cancel the import. I'm going to submit everything looks good. This is the process when you're loading a spreadsheet of less than 250 items. If it's 250 or more, it puts them into the system and kicks back a list of any errors. One thing that sometimes happens, if you get a longer list, it will be harder to figure out where the errors were. The other thing I did not point out is if you go to offers, as you can see this spreadsheet is the same examples. You can click here to get a spreadsheet to use as a template.. The required fields are in bold at the top. You can see that. So that is the offers template. We also have examples. One thing to note with Excel, you want to make sure you're using a version that will have the recent version. If you have a version that doesn't have the X at the end than the system won't recognize that. Eicher I recommend saving it than saving it as a CSV file and uploading that. Here is something that is entered as arrange. This one is talking about which ones are bound together. This shows the range that is being offered. You will see shipping date is required. For anything that is a single piece, the shipping date is required. To go back in as a regional. You can see I am a regional placeholder. I should see everything that was just offered. I think I is the same spreadsheet as before. You can sort by when it was posted. To give you an idea of how long you have left. The regionals do get notifications if it was within the last five days. You can sort and search by classification and filter by format condition. They both have items or actions to do either. You can suggest pass in bulk. One other thing I wanted to show you, I can show you the time periods by going into my library. Let's say I want 30 days instead of 45 days. If I click edit, I am going to change the regional to 30 days. I'm going to check that box and change that went to 60 days. I will go ahead and save that. You can see that changed my time period. If I were to login as a select live in Nevada. That is going to change the regional. I would have to set my own offer nationally. The default was 45 days. And we have the number 45 in their. If you do want to offer national costs you do have to change that from yes to no. So that is where you change the review periods. If I wanted to add additional user. That will be a user that has less ability as a user. If you have somebody who is not coordinator, we can place your coronary -- ordinator. You can set them up as a user and we can change their role in the system. Order you can contact us and we can add that for you. If you go to my user account, this is where you go to change your notifications. If this was a live site, I'd be getting all these emails. I am getting this through the site and email. I could take out the email. I want to leave the Roundup. And take out the second warning. I can set whatever I wanted to. I am going to turn them all off. Anything that says site, you are going to get things to the notification. It is in the top right corner. If you set email, you're going to get it through the email you sent to the account. Different people in your library can have different notifications based on how they set up their account. I'm going to turn off the email. I am going to click submit. And now it says my changes have been saved. I will say everything has been turned off. Those of the big things I wanted to get covered. Are there any questions.

>> We are going to address questions about the difference between the training and production site. But we will answer other questions as we have time. Any questions you have, we will answer them off-line. The postage reimbursement of is -- Kenny record --

>> It is saying you are willing to pay postage. We have heard from some libraries that they can and in other cases they can't. Check the yes box and put a note that says, can pay postage. Under $10. Or can pay postage within the state. Those kind of things. That helps clarify it. That recently we had need to clarify in a later release.

>> How do complete the spreadsheet if you know the materials are over 5 years old but don't have the date?

>> If you don't have a date, you should be able to put in none in the spreadsheet for the shipping date.

>> To have to create a new password the first time in?

>> Yes. You should create a new password. We had you go to the page and set it up. Contact us and we will sent up a password for you if the passwords getting caught in your spam folders. Let me go ahead and show you where you go to change the password. Let's pretend I just got the password. I'm to go to the library account, I mean user account. If I scroll down, this is where I would put in my current password. This is where I would put in my new password and it will tell you if the quality of the password is good. You do have to have one capital, one lowercase, one number and one special. There. Had you can't -- you can't use the same password you've used the last six times. If you do accidentally try to login with the wrong password five times in a row, you will be block. We block for six hours. One of the things is that you will get an error message. It'll say you are locked out, please try again later. Go here to change your password. Don't go there. What happens, you really have to wait six hours. If you go change your password, then you get in the system and you have to stay in the system for six hours or you get really locked out. It is better if you accidentally lock yourself out to wait six hours and then try it again and you can reset your password at that time. Or if you've tried three or four times, then maybe

go head and reset your password so you don't get to the point where you are getting locked out. How closely does it read the documents?
>> It should match regardless of the spaces. It does look for the:. It doesn't save it without the spaces. So it doesn't matter.
>> Had you claim an idea your item -- library would like. -- How do you claim a item your library would like?
>> You can click here and say request offer. If it is something from your region, you can go here. I'm going to go look at offers. This is going to show me that is everything that is available. I can request an offer here. It looks like these are from my select does. I'm so getting the disallow and pass on these. I am going to log out and log back in. There may not be a whole lot in here. We have a default set of 45. So I'm not seeing much here. If I did not want to go to search, I could search here. I do not want to get into a lot of details on this. We do have this covered in a webinar previously and those are available as recordings. And we will cover -- cover this again when we get everything scheduled. I want to make sure I'm looking at the right one. When it says Roundup, that is like a digest. This is if you are a regional. And expire in the next five days. Will remind you to go in here. That is going to give you a list of anything that is available on a weekly basis. Or you can check a daily basis. If you are not doing a lot of review and go in once a week, that can give you an idea of what is in their. Whether or not it is worth going in or not. That is kind of what those are for.
>> When he showed the example and selected the time for review. Is up for the your region only?
>> Is only for your region. For libraries that are using the tool, they may be setting at a five day review. Or they can set at zero. So then after something has gone review, they can offer it exchange. It will go on to the next timeframe. And not hits the regional review, and then it should go onto the national. And if you're in one of those situations, there is not a reason to answer it -- enter it in.
>> How many rows can a have on their Excel spreadsheet?
>> You're supposed to be able to upload any number but I ran to a couple that were too large. I have been able to upload things that are 500. At this point, if you do 500 or less, you should be safe.
>> Do they need to enter each item twice?
>> When you do a spreadsheet, you upload into the exchange site. You do not need to do it again.
>> Will postage be weighed for preservation assurance partners?
>> If you are preservation steward, we are paying postage and some of those cases, you need to work with GPO on that. I'm not really involved in that process. I am not sure. If you most, we will get you to the right person for that.
>> Are you required to change your password at a certain regularity?
>> No. We did not set anything up.
>> Can you post an example of the spreadsheet that includes all field that should be uploaded?
>> We have samples. It does not have the highlighted headers. If you go to the Excel version of the spreadsheet, this does highlight where and which ones are highlighted -- required. You do want to make sure that some spreadsheets have the document number. None of those have any sort of validation on them. So that's awesome the shops why we need to have the, speak and it -- classification in a separate column. These are also available. I will show you how to get these. We have sample spreadsheets down here. So those are where you can find those.
>> Are using the shipping date as or the receipt date?
>> Yes. Anything is the receipt date. It's to verify of head of her 5 years.
>> Multiple documents may be listed for an item. A of location to pull documents?
>> The system of record is a good place to pull it. You can also pull it from your catalog. At is matching, that can be real problematic where a number has been corrected. It is not going to match. You might still see it if you're browsing but you're not going to get the match information on a.

>> How do levers manage postage reimbursement? The Mac that is up to you to work out amongst yourselves. We are covering posted for preservation stewards, and you would need to contact GPO. But in general, it is up to the library. Some states have courier services within the state. You can put into the courier service. And some of those libraries can make it available within the state. If you have one of those situations, you can't with the in the notes field. We can do it in courier.
>> We can put -- pay up to $10.
>> The only problem she is having his posting and offers list with the shipping date. She had to individually mark the 100 error codes within the exchange. There was not a mark all option.
>> That is a good idea. You should be able to being able putting none in there.
>> What about Henry directly into the system without doing a spreadsheet?
>> If you do that, you'll want to go into here and and -- it might be easier to just enter it directly in here unless you need the spreadsheet for your personal records. I'm in a go to the repository and look at need. I think I'm going to be able to see more here. I have 1700 needs. If I am scrolling through the needs list,, I'm going to click on that to open the record and then here, I will have the copy item. Gives me the choice to copy the item and create a new need or offer. If it was something that I had and was willing to offer. I cannot give it directly to the University because it's offered in my region. I'm going to create an offer from this need record and clicking here. Half dad some information. I'm going to say I can pay postage and is in good condition. Condition is another one, if you are putting in a need, I can be multiple conditions, they were doing and offer, you want to do the condition of the thing you have in hand. If you put any in the offers column, it is going to throw that out as an error. So went to click submit. And I have an offer in that should match the need. How did they show if they are substituting an electronic for intelligible.?
>> It is up to the regional but what we have been suggesting is when you offer something that you are substituting for a tangible. And you add in the note field. Talk to your regional about the wording they want to have in the notes field and how they would like you to do it. That is what we are suggesting.
>> Can the regional change the review date by title? At the default is 45 days can a specific title be 60 days?
>> We do not have the ability to change it. Is 45 days for everything. These are all saying 45. Now they all have 30 or 28 depending on how long it's been in there. Other any other questions? You can always email and we will answer any questions.
>> Windows of process go into effect?
>> It is actually in effect now. We launched it last Tuesday. It is available for you to use. If you are in a selective, make sure you're following your regional process. If you're in Wyoming or Nevada, talk to GPO if you have any questions. If you want to contact us, we can make sure your questions get to the right place if we can't answer them. The webinar is recorded and you will get recording in her email and it will be available on the Academy site.
>> Is the library admin need to review all of the offers?
>> The library admin needs to review anything uploaded but -- that is added by someone who is not part of the library. If you want to add somebody the library admin, just contact GPO.
>> Is it still important that the regional is still in charge of this card process? Take questions to them. He would set the regional 20 and select lives, the regional might lose some of the bells and whistles of being notified. But they would lose it when something is being offered.
>> It is going to be your regional is the one who sets the time, it'll be up to them who makes that decision. There's a question from Alicia?
>> Is that on a selective by selective basis?
>> Regional sets it for the region. Whatever it is, if they are not reviewing or taking a quick look at things, it expires when the time frame is up and the select lives choose their own timeframe for offering

it nationally. That is where they choose yes or no to offer it. The selective pixie yes or no to offer a nationally. And then they pick the timeframe for how long they want to do that.
>> If somebody wants something your offering, you get an email?
>> That is going to depend on your notification set up. In general, yes. Assuming you select that that. You can also email to get a notification within the system. There is the cartoon bubble thing which is the icon for the notifications. That gives you notifications within the system.
>> How do you print the list so you can take it with you to check your stacks?
>> I would recommend download the CSV file and take it in Excel and format it in a way so you can take it with you to your stacks. When you done those those lists, you can search by a number starting with whatever you want. You would get whatever you filtered a search by.
>> What happens when the review period is up?
>> What is completely expired, I get a notification that you have the right to discard it. I think it does discard and mark them out.
>> Are there any other questions.'s. We will also be updating some videos over the next month. We hope you enjoy using the tool. Recharges having other questions.
>> Once the document has been approved to regional, is there way the regional can skip the approval process? To make that is a good question. I am in review offers now, I can filter by library and contact my regional, I want to offer them nationally. And I am going to say I'm the test Nevada library. And that is going to filter it once that filters, where they can click here and select everything and then they can accept or pass in bulk. And not will move it on to the next. You can get it through the regional review period that way.
>> Thank you all very much.
>> Thank you. [Event Concluded]