

FDLP eXchange Virtual Discussion Topics - May 29, 2019



Posted May 6, 2019

GPO is hosting a virtual discussion with the FDLP community on May 29, 2019, at 2:00pm EDT to gather input on future FDLP eXchange development. This document is provided in advance of the session to give participants some time to think about the issues and what would work best in their libraries. The information provided below includes a brief overview of the planned topics and some questions for users to consider in preparation for the discussion.

Topic 1 – Reports and Statistics

GPO is seeking feedback on the types of reports and statistics that libraries need from the FDLP eXchange. Examples of reports that libraries have requested include:

- Ability for a regional to get a report of all the offers they have passed on from their selectives.
- Ability to get a list of all items in statuses that need action (such as awaiting admin approval, match accepted by only one library, etc.) for more than 2 weeks, by library.
- Statistics on the number of offers posted by a library during a specific time frame, such as a month or a year.
- Statistics on needs fulfilled through the system.

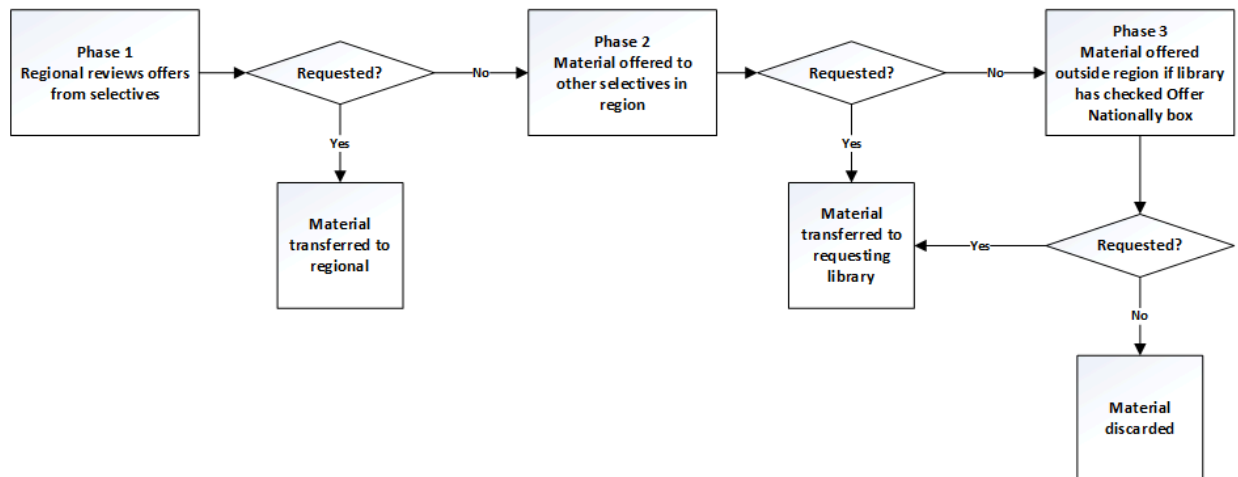
Questions:

- What type of information does your library need to get from FDLP eXchange?
- What information does your Director ask for that we could provide from FDLP eXchange? Your collection development librarian? Your reference librarian? Others?
- Does your library need data output that can be used outside the system in spreadsheet form?
- Does your library need static reports for reviewing or processing in some way?
- Does your library need “quick facts” type information from the system?
- What type of presentation is most useful? Charts and graphs? Table data?
- Is there some information you need in one form and other information you need in another form?
- What is your preferred delivery method for this information? A reporting dashboard? An interface that allows you to access reports online and print as desired? Reports emailed to individuals?
- Who should have access to reports for your library? Anyone who has an account in FDLP eXchange? Only users with the Library Administrator role? Only designated individuals?
- Are there reports that you want to have scheduled and run at a set frequency? Reports that you want to run on demand?
- If you’re in a regional depository, are there reports or statistics that you need to help manage your region’s usage of the system?

Topic 2 – Editing and Routing Offers and Needs

Giving users the ability to edit offers after they have been submitted presents some challenges that are not immediately apparent. For example, if a selective edits an offer after their regional has reviewed and passed on the offer, under what circumstances does the offer need to go back into the regional's queue? GPO would like to talk through scenarios to get a better sense of what is most workable for our libraries.

FDLP eXchange Offer Workflow



The graphic above illustrates the basic workflow of an offer after it is submitted.

Assuming that editing is allowed in certain circumstances:

- Can a selective edit an offer while it is in Phase 1? If so, does the clock for the review period start over again?
- If a selective edits an offer while it is in Phase 1, are there certain fields that will make it difficult for the regional to identify the offer? For example, if an edit to a SuDoc number occurs while a regional is checking whether they need the offer, will the regional be able to identify the offer under the new SuDoc number? Is an additional identifier needed to help track the offer in this case?
- If a selective edits an offer after the regional has passed on the offer, does it need to go back to the regional for review? Are there some changes that could impact whether the regional wants it?
- If the offer needs to go back to the regional in certain circumstances, but not others, what changes would send the offer back to the regional? For example, is a change to a SuDoc number something that could change whether the regional wants it? Is a change to a notes field something that should continue through the workflow from the point where it was when it was edited?
- If an offer is edited in Phase 3, does it need to go back to the regional to start the process again?
- If an offer that is edited in Phase 3 needs to go back to the beginning in certain circumstances, but not others, what would send the offer back to the beginning?

- Needs do not go through the same sort of workflow as offers. Instead, they stay in the system until they are fulfilled or removed. Are there cases when a need should or should not be editable?

Topic 3 – Login Page Enhancement

The current FDLP eXchange “main page” only has the FDLP eXchange logo across the top and a place for users to login. What would users like to see on this page to make it more useful or user-friendly?

A screenshot of the FDLP eXchange login page. At the top, there are two buttons: "Log in" and "Request new password". Below these is a "Username" field with a red asterisk and the instruction "Enter your GPO username." followed by an empty text input box. Below that is a "Password" field with a red asterisk and the instruction "Enter the password that accompanies your username." followed by an empty text input box. At the bottom of the form is a blue "LOG IN" button.

Topic 4 – Other Functionality Needed?

We will save some time at the end for participants to make suggestions that have not been covered.