

Demo and Q&A for FDLP eXchange Release 1.1

Expected release summer 2023!



FDDL eXchange 1.1

The screenshot shows the FDDL eXchange 1.1 dashboard. At the top, there is a navigation bar with the FDDL logo and 'FDDL eXchange' text, followed by 'LIBRARY ACCOUNT', 'HELP SECTION', and notification icons for 104 and 2. Below this is a dark blue navigation menu with links for 'Dashboard', 'Review Offers', 'Input', 'My eXchange', 'Needs & Offers Repository', and 'Advanced Search'. The main content area is divided into three columns. The left column contains four blue buttons: 'INPUT NEEDS', 'INPUT OFFERS', 'SUBMIT ITEMS FOR REVIEW', and 'REVIEW OFFERS'. Below these is a 'Recent Messages' section showing '2 new messages' and an unread message from 'Lisa Russell Regional Depository' dated 01/11/2022. The middle column, titled 'My In-Progress Items', shows '0 offers pending my review' and '6 matched needs pending my review'. The right column, titled 'New Items in the Repository', shows '333 as of April 6' and lists three items: 'Nursing home vaccination :reaching Healthy People goals', 'Mandatory managed care :changes in Medicaid mentalhealthservices', and 'Inspection of suspension-type highway trailers prior to loading and unloading with powered industrial trucks'. Each item includes its classification number and publication date.

Primarily a platform migration with a few changes.

- Dashboard remains the same.
- Screenshot shows dashboard for library admin at a regional.
 - Some content shown will span 2 columns as it currently does.



Changes in FDLP eXchange 1.1

Spreadsheet Changes

- Spreadsheets will be limited to 250 lines maximum and must be in CSV format. Instructions for converting from XLSX to CSV have been linked from the [FDLP eXchange Instructions page](#). Scroll down to Training Materials & Templates.
 - No “short upload” and “long upload.”
 - All spreadsheet uploads will have a review panel to check entries before posting spreadsheet.
 - Previously the limit on the “short upload” was based on file size. The new limit is the number of lines.



Changes to Upload Screen

UPLOAD OFFERS OR NEEDS

UPLOAD OFFER(S) OR **UPLOAD NEED(S)**

Upload an Existing Offer or Offers

Lists limited to 250 items and must be in CSV format. See [Instructions for Converting XLSX to CSV](#) for help with lists created in XLSX format.

CSV only

Choose File No file chosen

IMPORT FILE

Download Import Template and Examples

[Download Needs Import CSV Template](#)

Use the templates above to create offers in a spreadsheet.

Instructions to Convert XLSX to CSV linked from the page.

Template only available in CSV format from this page.

Instructions below the template have been updated.



Changes in FDLP eXchange 1.1 (cont.)

Date Fields in Spreadsheets

- “None” should be used when there is no data available for a date field, such as when a shipping list is unavailable.
- Date fields must be formatted as YYYY, MM/YYYY, or MM/DD/YYYY. Other formats, such as “February 2015,” are no longer accepted.
- Shipping List / Receipt date will still need to be a full date, unless “None” is used.
- The Data Dictionary will be updated to reflect these changes.



Review Panel Opened to Edit Offer

Design guide for precast UHPC waffle deck panel system, including connections TD 2.30/26:13-032 06/2013 Paper Good **SAVE ITEM** **REMOVE ITEM**

Document Title *
Design guide for precast UHPC waffle dec

Classification Type *
 SuDoc
 Library of Congress
 Dewey Decimal
 Other

Classification # *
TD 2.30/26:13-032

Does This Offer Contain Multiple Pieces? *
no

Multiple Pieces Notes

Publication Start Date *
06/2013

Publication End Date

Date Received by Institution / Shipping List Date *
None

By specifying "None", you accept the Legal Disclaimer below.

Legal Disclaimer
I agree that the material offered is material that my library is eligible to discard, as it has been retained for five years or is a secondary copy, superseded, or material eligible for online substitution.

Format *
 Paper CD-Rom Microfiche DVD
 Floppy Disk VHS Tape Braille
Map Poster Other

Postage Reimbursement Available?
 Yes

Condition *
 Fine
 Good
 Fair
 Poor

Condition Notes

PURL/URL

OCLC

CGP System #

Additional Notes

Publication Start Date
06/2013, not June
2013.

“None” in Date
Received by Institution
/ Shipping List Date.

No box to check for
Disclaimer, now
specifying “None”
indicates acceptance
of the Legal
Disclaimer below.



Changes in FDLP eXchange 1.1 (cont.)

Site notifications

- Site notifications will not be migrated over to the new site.
 - Site notifications will continue to clear as they are viewed (same as the current site). Notifications will clear after 30 days if they have not been viewed on the new site.
- Addresses an issue caused when someone has too many uncleared notifications, preventing the dashboard from loading after login.



Platform migration and shutdown

There will be a brief shutdown (up to 7-days) during platform migration this summer (dates to be determined).

- The shutdown will **NOT** stop the time in the review periods.
 - Because of this shutdown, regionals who use eXchange should consider:
 - Increasing their Regional Phase 1 and Selective Phase 2 review periods to make sure nothing expires.
 - Note that shortening the review period back down will affect items already in the queue for the shortened period of time as those items will automatically advance to the next stage (ex. If the review period is shortened to 30 days from 45, everything already in the queue for 31+ days will advance to the next stage).
 - Potentially encourage their selectives to not submit items for a period before the site shutdown.



Keeping up with eXchange

Dates and details about FDLP eXchange development will be shared via FDLP News Alerts and email.

See the FDLP eXchange Application Development page at <https://fdlp.gov/project-list/fdlp-exchange-application-development> for details on releases 1.1, 1.2, and 1.3.



Demo of Converting XLSX to CSV



Questions?

Please put your questions directly relating to the release of FDLPeXchange 1.1 into the chat.

We'll start with questions we received via the webinar registration form:



Question 1

When will the shutdown take place?

Answer: The brief shutdown (up to 7-days) will take place sometime in early summer. Everyone will be notified via a post on [FDLP.gov](https://www.fdlp.gov) and in an FDLP News email alert. Coordinators will be notified via direct email.



Question 2

Does this essentially stay the time period of all offers during the shutdown/migration? Meaning, if something had three days to go before the shut down, once back up and running, does it still have three days to go in offers?

Answer: No, the review times do not stop during the shutdown. As mentioned on slide 8, we recommend your regional consider extending the review period.



Question 3

What prompted the release?

Answer: New versions of the platform are released periodically, and FDLP eXchange was due for a migration to a newer release.



Question 4

Will there be a way to batch update titles in the 1.1 release? (For example-remove/delete multiple titles at once, instead of deleting each individual title one at a time.)

Answer: Not in the 1.1 release, but bulk actions are an enhancement planned for the 1.2 release.



Question 5

Will there be some sort of archive of discard lists?

Answer: Archive features are being investigated for release 1.3.



Question 6

Will there be a way to correct SuDoc numbers?

Answer: There is no way to correct SuDoc numbers. To keep incorrect offers from moving through the system the offering library could select 'Mark as Kept,' or the regional can 'disallow' before the end of Phase 1.



Question 7

Can we have more than one admin account in eXchange?

Answer: Your library can have as many administrator or user accounts as you need. Your library must have at least one library administrator account, but user accounts are optional. Submit an askGPO inquiry (Select Category: FDLP eXchange) to request administrator or user accounts.



Additional Questions & Comments

- Joe Paskoski, jpaskoski@gpo.gov
- Donald Sensabaugh, dsensabaugh@gpo.gov

Additional questions for GPO staff? Contact us using [askGPO](#).

A recording of this webinar will be made available in the [FDLP Training Academy Repository](#).



Question 8

How to submit an item with no Sudoc, shipping list date, or another required field? For those items 'looseleaf', for example, should they be entered one by one in the exchange or is there another option? Some will not have a required field to submit.



Question 8 (cont.)

Answer: You will have to enter the required fields, but there are workarounds:

No SuDoc number – chose Other under Classification and make the appropriate choices there.

No shipping List Date – on the web form, click the text box “I don’t have a date” and check the legal disclaimer, or enter None in a spreadsheet. When 1.1 is implemented entering None in the spreadsheet for any required date field will be sufficient.

Looseleaf – on needs or offers input form you could check the Yes radio button box that says the publication has multiple pieces, enter a range with a publication start and end dates, and enter additional information, as appropriate, in the Additional Notes text box, which is searchable.



Question 9

How long should items be in the 'Pending Approval by Admin' status?

Answer: 'Pending Approval by Admin' status will remain until an FDLP eXchange administrator account holder for your library takes action on those submissions and selects either 'Submit to Repository' or 'Delete.' There is also an 'Edit' button for the administrator to use.

