

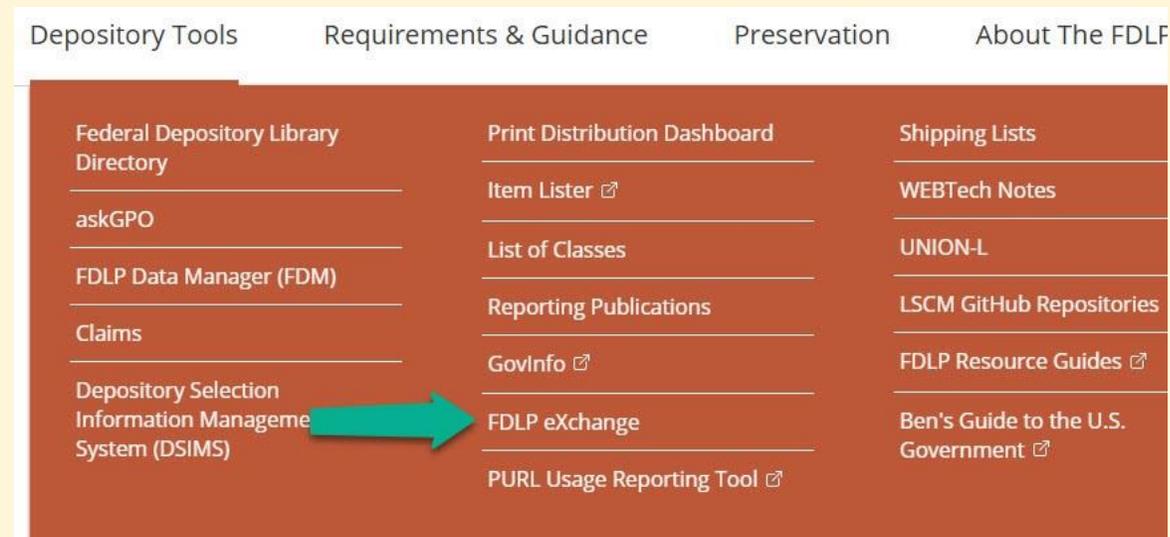
FDLP eXchange Basics



Accessing FDLP eXchange

FDLP eXchange can be accessed from <https://www.fdlp.gov/>

- In the top menu:
 - Depository Tools > [FDLP eXchange](#)



Live and Training Sites

FDLP eXchange has a [live site](#) and a [training site](#)

- The login button in the sidebar goes to the live eXchange site
- The training site is used for practicing entering offers and needs in eXchange
 - Materials entered on the training site are not offered to other libraries



eXchange Instructions and Guidance

<https://www.fdlp.gov/instruction/fdlp-exchange>

- The FDLP eXchange instructions page includes the following items:
 - [Data Dictionary](#)
 - Spreadsheets for needs and offers
 - [eXchange Tips](#)
 - Quick Start Guides
 - [Training Videos](#)
 - Past Webinars

Training Materials & Templates

- [Data Dictionary](#)
- Spreadsheet Templates and Samples
 - [Template for Needs Spreadsheet](#)
 - [Template for Offers Spreadsheet](#)
 - [Sample Needs Spreadsheet](#)
 - [Sample Offers Spreadsheet](#)
- Instructions for [Converting an XLSX Spreadsheet into CSV](#)
- [FDLP eXchange Tips](#)
- FDLP eXchange QuickStart Guide
 - [FDLP eXchange QuickStart Guide for Regionals](#)
 - [FDLP eXchange Quick Start Guide for Selectives](#)
- [Training Videos](#)
 - Getting Started – Regionals (5 minutes, 57 seconds)
 - Getting Started – Selectives (5 minutes, 17 seconds)
 - My eXchange (3 minutes)



eXchange Dashboard Navigation

The dashboard is the first page that loads and can be returned to by clicking on either the FDLP eXchange icon or Dashboard

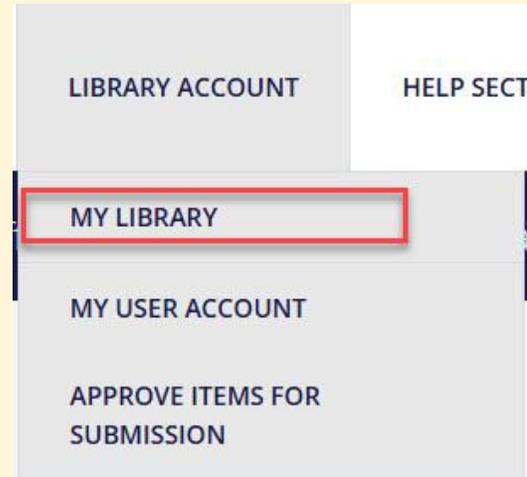
The screenshot displays the FDLP eXchange dashboard interface. At the top left, the logo and text "FDLP eXchange" are visible, with a red arrow pointing to the text. To the right of the logo are links for "LIBRARY ACCOUNT" and "HELP SECTION", and two notification icons, each with a "0". Below this is a dark blue navigation bar with the following items: "Dashboard" (highlighted in brown), "Review Offers", "Input", "My eXchange", "Needs & Offers Repository", and "Advanced Search" (with a magnifying glass icon). Below the navigation bar are four blue buttons: "INPUT NEEDS" (with a red arrow pointing up to it), "INPUT OFFERS", "APPROVE ITEMS FOR SUBMISSION", and "REVIEW OFFERS". To the right of these buttons is a white box titled "New Items in the Repository" showing a large "0" and the text "as of April 16".



My Library

My Library shows:

- Library information
- Current review periods
 - Admins can edit these by clicking Edit Library
- User accounts (including inactive accounts)



GPO Library

Street: 732 North Capitol Street NW

Mailing Address 1: Mail Stop IDLS

Mailing Address 2: 44 H St, NW, Loading Dock

City: Washington

Library Name: GPO Library

State: District of Columbia

Zip Code: 20401

Time for Regional Review: 45

Time for Selective Review: 45

Time to Offer Nationally: 45

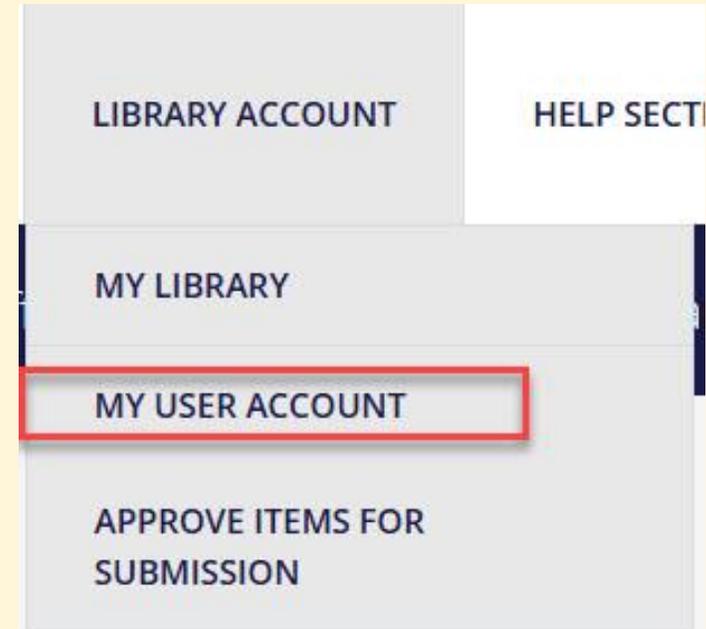
Offer Nationally?: Yes



My User Account

Users can edit their information here including:

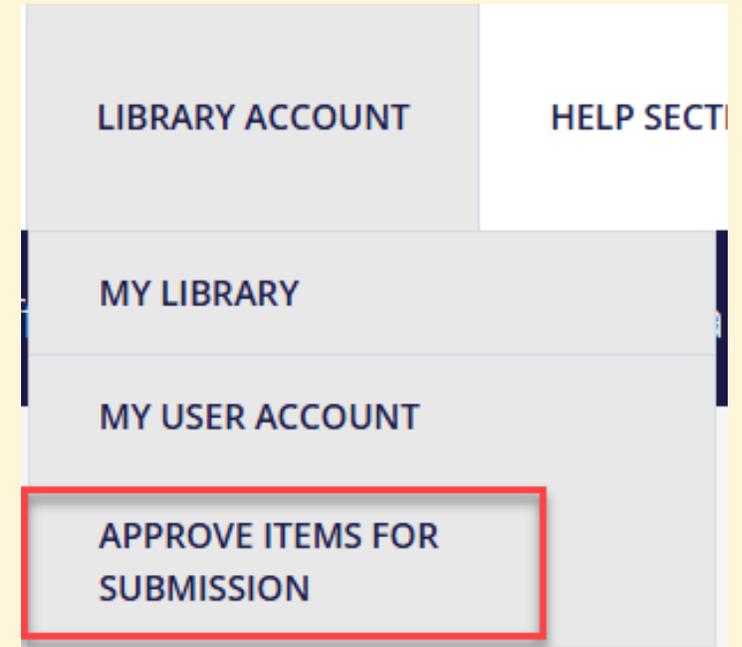
- Email
- Password
- Notification Preferences
 - It is recommended to only turn on a few notifications and to regularly clear them by using the bell icon on the dashboard



Approve Items for Submission

Only available to Admins in eXchange

- Can be accessed from Library Account or from the Approve Items for Submission button on the Dashboard
- Admins can edit offers, approve them by clicking the Submit to Regional button, or delete them



Crafting naval strategy : observations and recommendations for the development of future strategies ➔

D 208.216:1

EDIT

SUBMIT TO REGIONAL

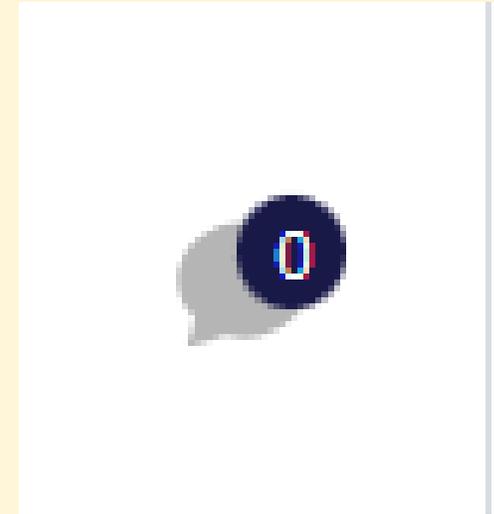
DELETE



Messages

To send messages in FDLP eXchange click on the speech balloon icon

- This icon also appears on offers/needs in FDLP eXchange
 - The To field will be automatically filled in when using the message icon from an offer/need
 - If the To field is not automatically filled in, information about the offering/needing library can be found by clicking on a matched item



Manually Inputting Offers

Can be accessed through Dashboard > Input Offers button or Input > Manually Input an Offer or Need

- Document Title, Classification, Multiple Pieces, Publication Date, Format, Postage Reimbursement Available, and Condition are required fields
 - This is indicated by the red asterisk
- Check for errors will check for any errors before submission

Add A New Offer

** Indicates a required field*

Document Title *

CHECK FOR ERRORS



Manually Inputting Needs

Can be accessed through
Dashboard > Input Needs button or
Input > Manually Input an Offer or
Need

- Same required fields as for offers
 - Information about acceptable values is contained in the Data Dictionary
- Digitization and Disaster Recovery are optional fields
- Check for errors will check for any errors before submission

Add A New Need

** Indicates a required field*

Document Title *

CHECK FOR ERRORS



Required Fields: Document Title

Enter the title on the document, if entering a serial item use the preferred title for the serial

- If the title for the item is not available, use [DiscoverGov](#) or the [Catalog of U.S. Government Publications](#) and input any associated metadata

Document Title *

NASA Star Map



Required Fields: Classification

Four values: SuDoc, Other – Library of Congress, Dewey Decimal, and Other

- Enter the classification/call number as available for the material
- SuDoc is the preferred value for matching purposes
- If this information is not available, it is recommended to check either [DiscoverGov](#) or the [Catalog of U.S. Government Publications](#)

Classification *

(SuDoc strongly preferred for optimized matching)

SuDoc

Other

NAS 1.21:1996-2007



Required Fields: Multiple Pieces

Two values: Yes and No

- Choose Yes if offering a range of materials that includes multiple volumes, issues, etc. or if offering an item that contains multiple pieces onto itself (ex. microfiche)
 - The multiple pieces note field will appear and more descriptive information can be entered
- Choose No if the offer does not contain multiple pieces

Does This Offer Contain Multiple Pieces? *

(e.g., multiple volumes, issues, etc.)

Yes No

Multiple Pieces Notes

v. 1 - 32
Missing volumes 33-40
v. 41-50



Required Fields: Publication Date

Only the year is required for the publication date

- If entering a range of items, both the Date and End Date fields can be used
- If there is no publication date indicated, click the Item doesn't have a date checkbox
- For spreadsheets, only YYYY, MM/YYYY, MM/DD/YYYY, and None are acceptable formats

Publication Date *
Date * *(only year is required)*

Month ▼ Day ▼ 2025

End Date (if range)

Month ▼ Day ▼

Item doesn't have a date



Required Fields: Format

Ten values for format: Paper, CD-Rom, Microfiche, DVD, Floppy Disk, VHS Tape, Braille, Map, Poster, and Other

- For offers, only one of these values can be selected
- For needs, multiple values can be selected

Format *

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



Required Fields: Postage Reimbursement

Three values: Yes, No, Sometimes

- Choose Yes if your library offers postage reimbursement in all cases
- Choose No if your library does not offer postage reimbursement
 - No is the default value in eXchange
- Choosing Sometimes will reveal the Postage Reimbursement Note free text field
 - Conditions under which postage will be paid can be entered into the note field

Postage Reimbursement Available? *

Yes No Sometimes

Postage Reimbursement Note

Can pay postage up to \$10



Required Fields: Condition

Four values: fine, good, fair, and poor

- An explanation of these values can be found [here](#)
- For offers, only one of these values can be selected
- For needs, multiple values can be selected

Condition *

See Definitions for explanation of condition parameters →

Fine

Good

Fair

Poor



Optional Fields

Optional fields in eXchange can be included if the information is available

- Offers: Shipping Date, Condition Notes, Electronic Availability, OCLC, CGP System #, Additional Notes, and Internal Notes are optional fields
 - Shipping Date cannot be in the last 5 years. This will generate an error message. None is an acceptable spreadsheet value for this field.
- Needs: Digitization, Disaster Recovery, Additional Notes, and Internal Notes are optional fields



Inputting Spreadsheets into eXchange

It is recommended to use the templates for needs/offers spreadsheets [available here](#)

- Sample required fields are below
 - Spreadsheet templates also include optional fields

Title	Classification Type	Document number	Multiple pieces	Publication start
Publication end	Shipping Date	Format	Postage reimbursement	Condition



Inputting Spreadsheets into eXchange

Input > Upload Offers or Needs

- Spreadsheets are capped at 250 lines and must be in CSV format
- eXchange will generate error messages for items needing correction
- If a spreadsheet fails to load or only the first item loads, doublecheck that all required fields are included
 - Especially the Postage Reimbursement column

+ Transportation and the elderly : HE 23.3011:T 68 Sept. 1980 Microfiche Good [EDIT ITEM](#) [REMOVE ITEM](#)

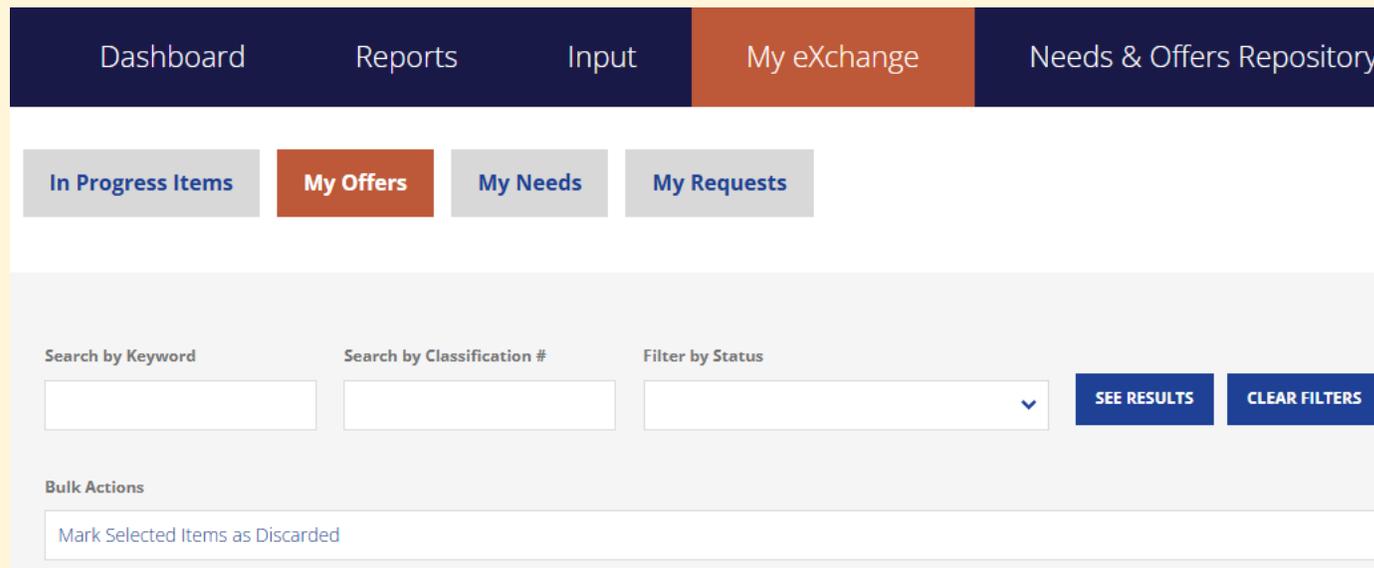
! There is 1 error in your item. This error must be corrected before it can be submitted.
1. Publication Start Date must be one of these formats: YYYY, MM/YYYY, MM/DD/YYYY, the word "None"



My eXchange

To view offers, needs, and requests that are in process go to My eXchange

- As eXchange does not archive inactive items, it is recommended to sort by Posted to see the most recently added items



The screenshot displays the 'My eXchange' interface. At the top, there is a dark blue navigation bar with five tabs: 'Dashboard', 'Reports', 'Input', 'My eXchange' (highlighted in orange), and 'Needs & Offers Repository'. Below this, a secondary navigation bar contains four buttons: 'In Progress Items', 'My Offers' (highlighted in orange), 'My Needs', and 'My Requests'. The main content area features three search filters: 'Search by Keyword' with an input field, 'Search by Classification #' with an input field, and 'Filter by Status' with a dropdown menu. To the right of these filters are two buttons: 'SEE RESULTS' and 'CLEAR FILTERS'. Below the search filters, there is a 'Bulk Actions' section with a button labeled 'Mark Selected Items as Discarded'.



Bulk Actions in eXchange

The following bulk actions are available in FDLP eXchange:

- Review Offers (regionals only): Request Selected Items, Pass Selected Items, Disallow Selected Items
- My Offers: Mark Items as Discarded, Mark Items as Mailed, Mark Items as Kept
- My Needs: Removed Selected Items, Mark Selected Items as Received
- Needs & Offers Repository: Request Selected Items
 - Be careful. It is not possible to bulk remove requested items in eXchange!

Bulk Actions

Mark Selected Items as Discarded

Mark Selected Items as Discarded

Mark Selected Items as Mailed

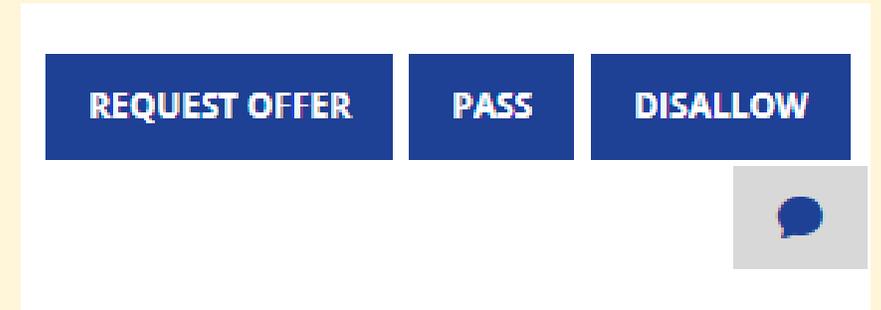
Mark Selected Item as Kept



Phase 1 (Regional Review)

Offers entered by selective users will need selective admin approval before going to the regional

- Regionals have the option to Request Offer, Pass, Disallow, or Message for offers that are pending their review
- Offers may expire from Phase 1 if the period for regional review runs out
 - If offers expire or are passed on, they go into Phase 2 (selective review)



Phase 2 (Selective Review)

Offers that have passed or expired from regional review go on to selective review

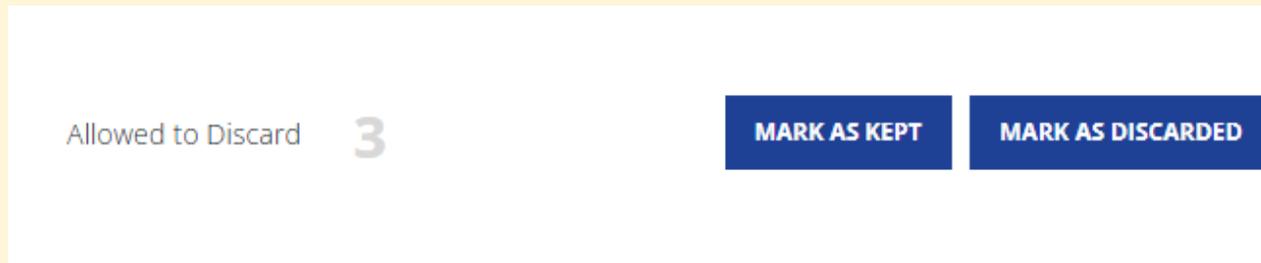
- During selective review, offers may be requested by any selective libraries in the region
- Once the period for selective review expires, the offers enter Phase 3
- To check the amount of time for selective review, go to My Library
 - Regional admins can change this value



Phase 3 (National Review, optional)

National review is completely optional in eXchange and can be adjusted using the My Library tab

- Items that are offered nationally are available to all libraries in eXchange through the Needs & Offers Repository
- If national review is not turned on, items will be available to be kept or discarded immediately after selective review ends (if they are not matched or requested by other libraries)



Matches in eXchange

Offers can match with needs in eXchange and vice versa

- Offers can also be requested by regionals during Phase 1
- Matches in eXchange need to be accepted by both the Offering Library and the Needing Library in order to progress

Match Requested
by Needing Library

1

MARK AS KEPT

ACCEPT MATCH



Matches in eXchange

Once both libraries have accepted a match, each will need to take specific steps to resolve the match

- The offering library will have the option to mark the item as mailed
 - The needing/requesting library will then need to mark the item as received
 - After a match has been received the final status will be fulfilled/transferred



Fulfilled/
Transferred



Questions & Comments

- Lorelei Sensabaugh, lsensabaugh@gpo.gov

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

