

FDLP eXchange: Manage your
discards and strategically
build collections



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 buttons on the sidebar go to each 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 Templates, Reference Documents, and Training Materials

The FDLP eXchange [landing page](#) includes the following items:

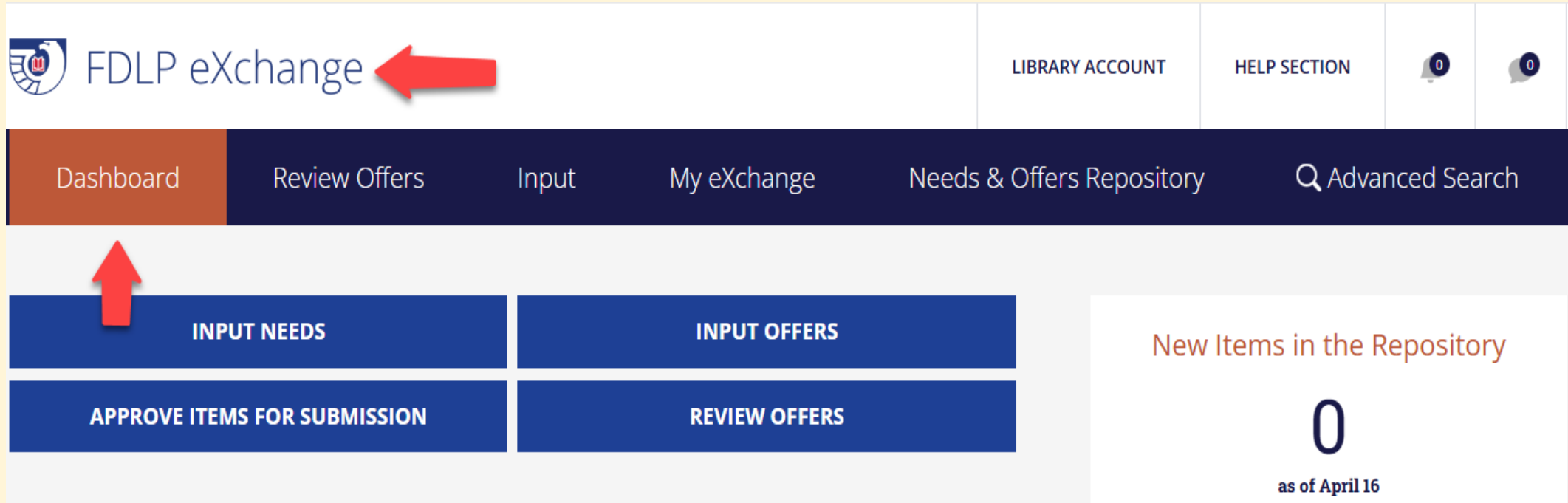
- Spreadsheets for needs and offers
- [Data Dictionary](#)
- [FDLP eXchange Tips](#)
- QuickStart Guides
- [Training Videos](#)
- Past Webinars
- Guidance

- [FDLP eXchange Tips](#)
- FDLP eXchange QuickStart Guides
 - [FDLP eXchange QuickStart Guide for Regionals](#) (PDF, created in 2017)
 - [FDLP eXchange Quick Start Guide for Selectives](#) (PDF, created in 2017)
- [Training Videos](#)
 - Getting Started – Regionals (Video, 5 minutes, recorded in 2019)
 - Getting Started – Selectives (Video, 5 minutes, recorded in 2019)
 - My eXchange (Video, 3 minutes, recorded in 2019)
 - Advanced Search (Video, 2 minutes, recorded in 2019)
 - Need and Offers Repository (Video, 2 minutes, recorded in 2019)
 - Regional Dashboard (Video, 2 minutes, recorded in 2019)
 - Selective Dashboard (Video, 1 minute, recorded in 2019)
 - Entering a Need Using the Form (Video, 3 minutes, recorded in 2019)
 - Creating a Needs Spreadsheet (Video, 9 minutes, recorded in 2019)
 - Uploading a Spreadsheet of Needs with Fewer than 250 Entries in FDLP eXchange (Video, 4 minutes, recorded in 2019)
 - Entering an Offer Using the Form (Video, 6 minutes, recorded in 2019)



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



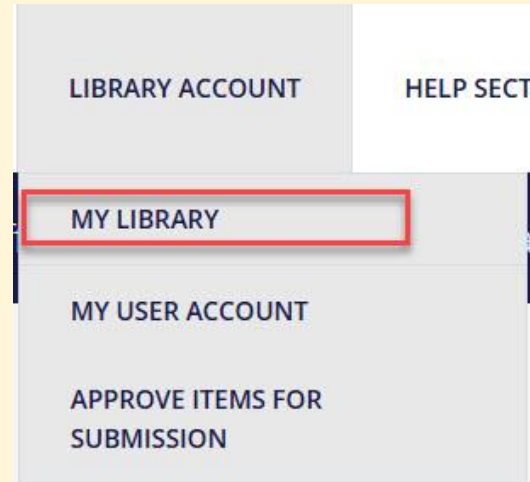
The screenshot displays the FDLP eXchange dashboard interface. At the top left, the "FDLP eXchange" logo and text are shown, with a red arrow pointing to them. To the right of the logo are links for "LIBRARY ACCOUNT" and "HELP SECTION", followed by two notification icons, each displaying the number "0". Below the header is a dark blue navigation bar containing the following items: "Dashboard" (highlighted in orange), "Review Offers", "Input", "My eXchange", "Needs & Offers Repository", and "Advanced Search" (preceded by a magnifying glass icon). A red arrow points to the "Dashboard" link. Below the navigation bar is a grid of four blue buttons: "INPUT NEEDS", "INPUT OFFERS", "APPROVE ITEMS FOR SUBMISSION", and "REVIEW OFFERS". A red arrow points to the "INPUT NEEDS" button. To the right of the buttons is a white box titled "New Items in the Repository" in orange text, which displays 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)
 - The view for user accounts is not always accurate



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

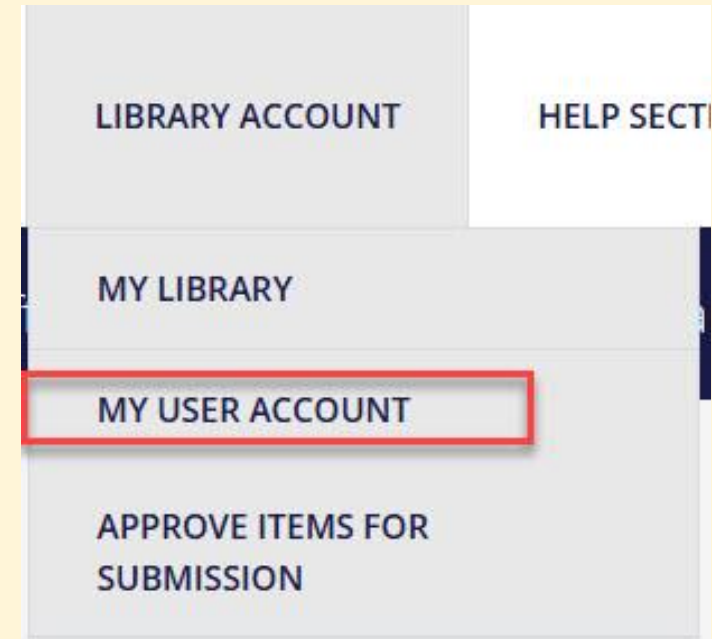
Offer Nationally?: Yes



My User Account

Users can edit their information here including:

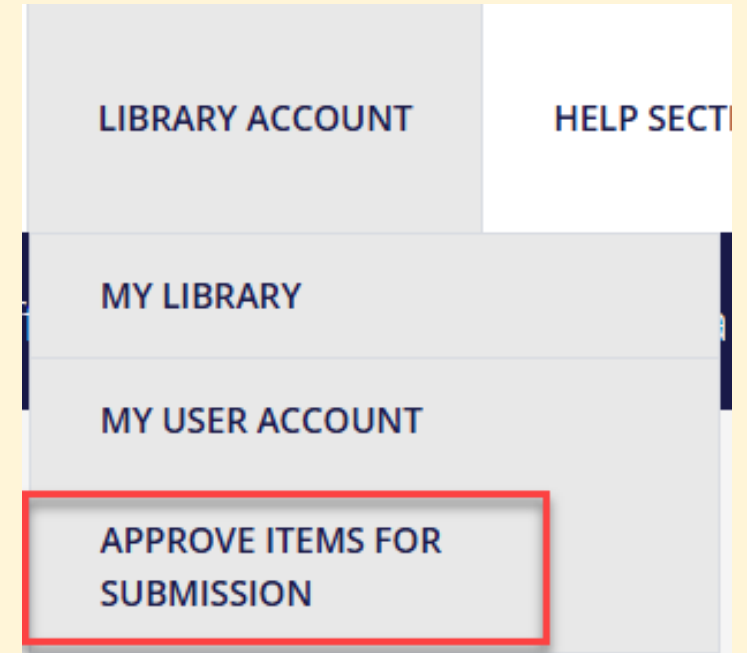
- Email
- Password
- Notification Preferences
 - It is recommended to only turn on a few notifications and to regularly clear them by using the bell icon on the dashboard



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
recommendationos for the development of future
strategies ➔

D 208.216:1

EDIT

SUBMIT TO REGIONAL

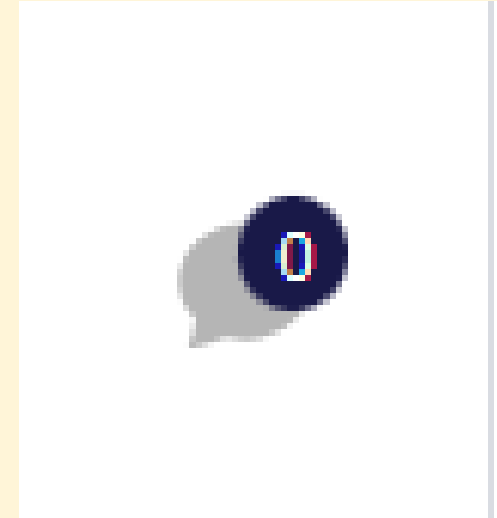
DELETE



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



More about Messages

The Messages tab has been recently revamped

- There are now options to mark messages by the statuses: read, important, or archive
 - It is also possible to search messages, sort by date, and view messages by unread, all, important, read, archive, or sent

11/21/2022 - 16:56

[Mark as Unread](#) [Mark as Important](#) [Archive](#)

Your Need Available

Document Title: ENERGY AND WATER DEVELOPMENT APPROPRIATIONS FOR 2003, Part 6
Classification: Y4.AP6/1:EN2/2/2003/PT.6

I have a copy in excellent condition. No postage reimbursement necessary. If still needed, please send me the shipping address.

Search Messages Sort View [APPLY](#) [CLEAR FORM](#)

Displaying messages filtered by: **Unread**

Showing 49 of 90 messages [1](#) [2](#) [next >](#)



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](#), the [Catalog of U.S. Government Publications](#) (CGP), or the [FDLP Data Manager](#) (FDM) 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](#), the [CGP](#), or [FDM](#)

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
 - Postage Reimbursement not being completed now has an error message

 Transportation and the elderly :
a selected bibliography

HE 23.3011:T 68

Sept. 1980

Microfiche

Good

EDIT ITEM

REMOVE ITEM

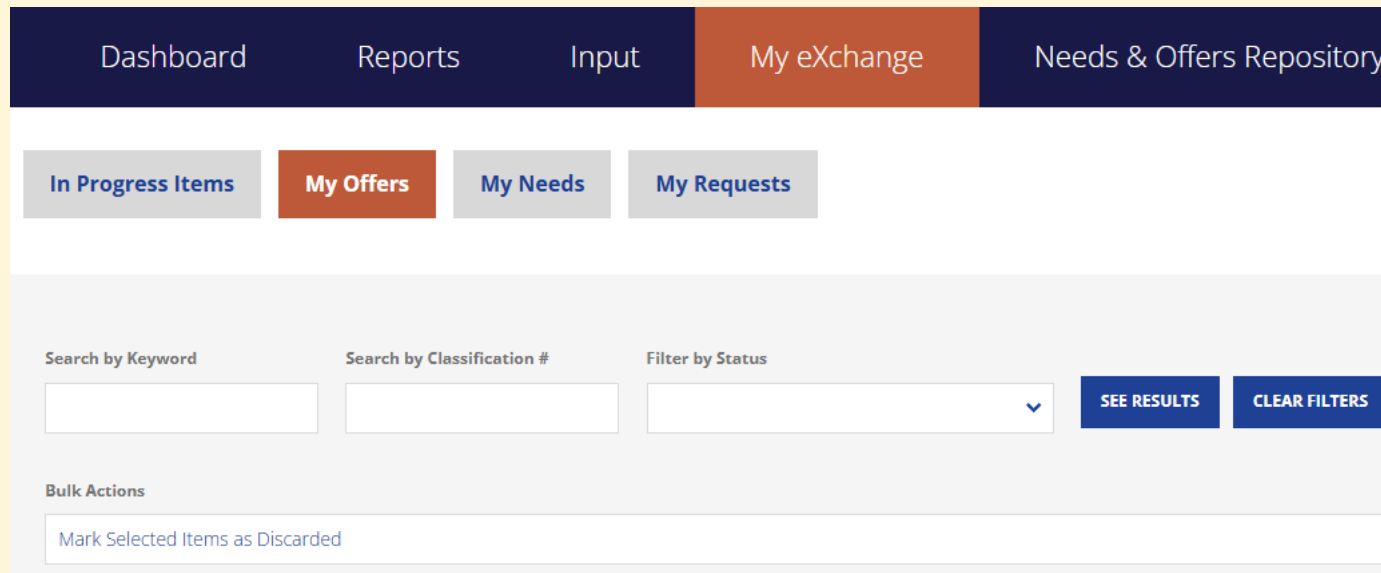
 **There is 1 error in your item. This error must be corrected before it can be submitted.**
1. Publication Start Date must be one of these formats: YYYY, MM/YYYY, MM/DD/YYYY, the word "None"



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' web interface. At the top, a dark blue navigation bar contains the following tabs: 'Dashboard', 'Reports', 'Input', 'My eXchange' (which is highlighted in orange), and 'Needs & Offers Repository'. Below this bar, a row of four buttons is shown: 'In Progress Items' (grey), 'My Offers' (orange), 'My Needs' (grey), and 'My Requests' (grey). The main content area has a light grey background and includes three search filters: 'Search by Keyword' with a text input field, 'Search by Classification #' with a text input field, and 'Filter by Status' with a dropdown menu. To the right of these filters are two buttons: 'SEE RESULTS' and 'CLEAR FILTERS'. At the bottom of the interface, 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 FDLPeXchange:

- 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

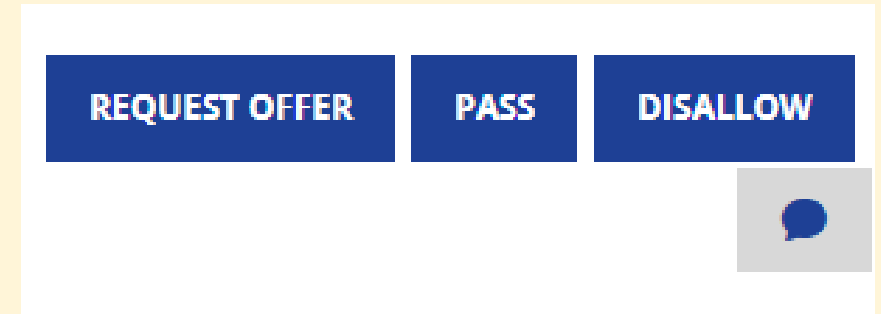
Mark Selected Item as Kept



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

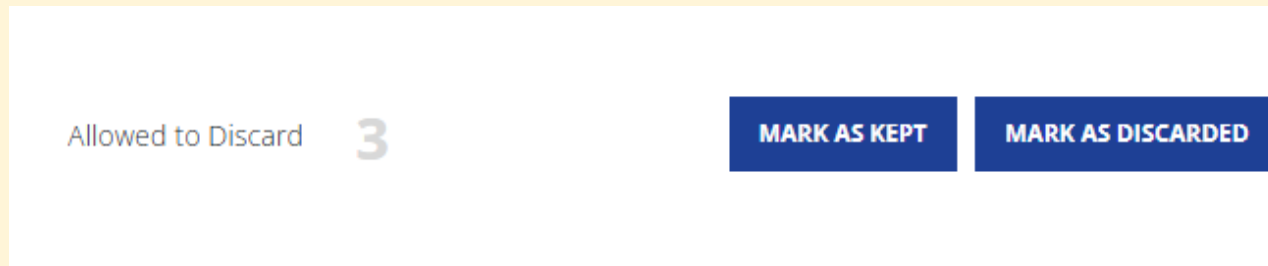
- During selective review, offers may be requested by any selective libraries in the region
- Once the period for selective review expires, the offers enter Phase 3
- To check the amount of time for selective review, go to My Library
 - Regional admins can change this value



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 or to cancel the match
 - 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](#).

