Setting up GobiAlerts for Faculty (or other non-library suggestors)

Introduction:

A GobiAlert will send an email notification to specified users allowing the users to make recommendations for purchasing back to the Gobi system. The user does not enter Gobi, merely sends messages to Gobi, which then are available under the Search tab, Recommendations (GobiAlerts) link. A GobiAlert will look like this in the mailbox:

```
From: DoNotReply@ybp.com [mailto:DoNotReply@ybp.com]
Sent: Saturday, October 16, 2010 3:52 AM
To: xxxx
Subject: GOBI Notification: 0PF Alert - 80 items for period 10/9/2010 - 10/16/2010 firman@pugetsound.edu

GOBI Notification: 0PF Alert - 80 items for period 10/9/2010 - 10/16/2010

This is a test of alerts.

These notifications created for xxxx can be viewed by clicking this link or copy and paste the following URL into your browser: http://www.gobi3.com/pages/login.aspx?token=4E6346C0D20540FD98AFC574E93598E2

And like this in content:
```

![GobiAlert example](image_url)
To set this up for your faculty, you need to first make sure the user mail information and particulars are created.

Creating User Profiles for Use with GobiAlerts

Go to the Notifications tab and select the Manage Notifications Users link.

While here you enter the entire user’s name, elsewhere in the system we must identify the user by three initials. Since all recommendations need to be reviewed by the liaison, best practice is to use the first character to identify the liaison assigned to the user. This will also help to identify those users who are not Gobi users, but who are working with Gobi materials.

<table>
<thead>
<tr>
<th>Liaison</th>
<th>Prefix</th>
</tr>
</thead>
<tbody>
<tr>
<td>Peggy Firman</td>
<td>0</td>
</tr>
<tr>
<td>Peggy Burge</td>
<td>1</td>
</tr>
<tr>
<td>Andrea Kueter</td>
<td>2</td>
</tr>
<tr>
<td>Rebecca Kuglitsch</td>
<td>3</td>
</tr>
<tr>
<td>Lori Ricigliano</td>
<td>4</td>
</tr>
<tr>
<td>Laura Schick</td>
<td>5</td>
</tr>
</tbody>
</table>

Example initial sets:
1dl David Lupher for Peggy Burge
3bm Bob Matthews for Rebecca Kuglitsch
5bm Bruce Mann for Laura Schick
This is what a finalized GobiAlert user will look like:

![Add GobiAlert User Form](image)

### Creating the GobiAlert

Use the Notifications tab  
Go to *Manage Notifications* (not Notification users)  
Click *Add* from left margin  
Enter *Saved Parameter name*: 
**Best practice** is the numeric prefix of the liaison and two initials of the GobiAlert User with the word Alert. This allows us to pick out the alert notifications from the Gobi user notifications when managing notifications. The example below shows how:

![Manage Notifications Table](image)

Example: 0pf Alert
The tutorial at Gobi on Notifications – GobiAlerts is reasonably good and will take you about 5 minutes to complete. It explains the basics about setting up notifications. There are a few things it does not explain.

Need to know:

When using notifications and GobiAlerts, the YBP system will only include titles profiled for approvals. Our UPS YBP approval profile is a subset of this larger approval profile universe. To access just our subset, use My library slips under the Universe category. To access the larger YBP profile, use All titles under the Universe category.

To specify call number ranges, you must include the letters in both positions around a hyphen and you separate ranges using semicolons, such as P1-P1091; PA1-PB205.5

I have found that if I have a long list of ranges to enter, it is simpler to enter a few, save the profile, reopen and add more through editing. That way, if you are making errors in entry, the error is more easily located.

**When using My Library slips universe:**

1. You can set up the alert using a YBP approval fund code that is coded into the document at the Library tab, Approval profile link. That will notify the user of every slip delivered for that code. If you do not enter the code correctly, you will not get any slips. Please note these are NOT the same as UPS library fund codes.

2. You can limit to only a portion of slips by entering a fund code and Classification range in the same box, but if you are searching my library slips, you should be able to limit to just a classification range rather than both.

Below you see an example where two parameters are combined by boolean OR. Here I have specified several class ranges OR using the fund code. This might be useful in areas where you want to test out new options (or for times when we are making changes)
When using All titles slips universe
You can add materials not included in the UPS YBP approval plan by listing instead an LC call number range within the all titles universe. This is not a recommended practice for a notification.

Best practice is to first create a GobiAlert for yourself and test it, so you can see how it will turn out. Continue adjusting it to get the results you think will be useful to the intended recipient. Alerts run on Saturday, but you can preview results as explained in the tutorial.

To avoid creating an alert you don’t really want, I encourage you to create a legitimate GobiAlert as a test, but enter yourself as the GobiAlert recipient. You can then edit the recipient for the next alert to go out to the permanent recipient of the alert. To do this, you will need to have created a user name for yourself as a GobiAlert recipient.
Faculty Recommendations

When the alert arrives, the faculty user will have the recommendation option you see below:

![Recommendation Option]

Basically, s/he marks the record and then clicks recommend. If s/he is successful in sending a recommendation, s/he will get a maroon message “Recommendation Acknowledgement” similar to the “Selection Acknowledgement” note that you get when you add selections.

Note that faculty are not actually interacting with Gobi and so may get a message like this if they try to click on a link that requires them to enter Gobi.

Turning Recommendations into Selections

When faculty or other GobiAlert users recommend a book for our collection, these recommendations enter the Gobi3 system but must be selected for action. Each liaison should go weekly into Gobi, and under the Search tab there is a Recommendations link.

![Gobi Search Tab]

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Your notification user account does not have authority to perform this action. Please log out and close all browser windows before logging into an account with proper authority.
**Best practice** is to search by your requester's initials (this is also the default). Since all your requesters begin with the same numeral, it should be easy. Only those requester initials that are currently present in the file will show up in the entry box. You can then look at the recommendations, check the GobiTween statistics and determine if you want to select. You must add the order information. This can be done by using GobiExpress to select or by putting the request into your select cart and adding order details there.