

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: xxxxx
Subject: GOBI Notification: OPF Alert - 80 items for period 10/9/2010 - 10/16/2010 firman@pugetsound.edu

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

This is a test of alerts.

These notifications created for xxxxx 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:

The screenshot displays a GobiAlert notification interface. On the left is a sidebar with navigation options: Marked Items: 1, Email, Save To Disk, Print, Remove, Sort, Mark All, Unmark All, Notification List, and Recommend (highlighted with a red arrow). Below the sidebar is the Baker & Taylor YBP Library Services logo and contact information: 8136 00000083642, GOBIPROD7 2.06.002.B. The main content area is titled "OPF Alert 10/9/2010 - 10/16/2010: 80 items." and includes a filter section (Unfiltered, 20 on page, Page 1 of 4) and sorting options. The item details are as follows:

- Title:** LEARNING CULTURE THROUGH SPORTS: PERSPECTIVES ON SOCIETY AND ORGANIZED SPORTS.
- Editor:** SANDRA SPICKARD PRETTYMAN
- Publisher:** ROWMAN & LITTLEFIELD
- Place of Publication:** LANHAM
- Pub Year:** 2011
- ISBN:** [9781442206311](#)
- Country Of Origin:** US
- Binding:** Paper
- Pagination:** 299 P.
- Edition:** 2ND ED.
- Classification Level:** ADV-AC
- YBP Select:** Research-Recommended
- LC Class:** GV706.S.L43 2011
- Subject Headings:** SPORTS--SOCIAL ASPECTS--U.S.
- YBP Interdisciplinary Topics:** Contemporary Social; Educational
- Approval Note:** AUTH: UNIVERSITY OF AKRON. NEW COLLECTION.
- Format:** New Edition; Collection/New
- Faculty Affiliation:** U Akron
- Language:** English
- LCCN:** 2010-22155
- US List:** 37.95 USD
- US Status:** In Stock
- Rush:** Available
- Handled On Approval YBP-US:** 10/20/2010
- Last Received YBP-US:** 10/14/2010
- UK List:** 22.95 GBP
- UK Status:** Orders accepted
- Last Received YBP-UK:** 9/23/2010
- Est. US Net:** 34.16 USD
- Slip Date:** 10/20/2010
- Slip Subaccount:** 8186-11
- Slip Discount:** 10.00%
- Library Note:** [Add...](#)

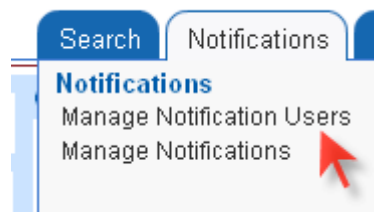
At the bottom, a summary table is shown:

Subaccount:	Quantity: 1	Fund Code: SOC	PO N
Note to YBP:		Location:	

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.

Liaison	Prefix
Peggy Firman	0
Peggy Burge	1
Andrea Kueter	2
Rebecca Kuglitsch	3
Lori Ricigliano	4
Laura Schick	5

Example initial sets:

- 1dl David Luper 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

First Name*

Middle Initial

Last Name*

Initials*

Email*

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

	^ Name
<input checked="" type="radio"/>	OPF Alert
<input type="radio"/>	AJK Communications
<input type="radio"/>	AJK Education
<input type="radio"/>	AJK P&G
<input type="radio"/>	AJK Psychology
<input type="radio"/>	LR Temp

Example: Opf 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)

The image shows a search interface with two panels. The top panel has the following settings: Classification: LC, NLM, Dewey; Classification Criteria: Begins with, Does not begin with; Classification Value: HD30.3; P1-P1091; PN1990-PN1999; P...; Interdisciplinary Criteria: Matches any, Matches all, Does not match any, Does not match all; Interdisciplinary Topics: AIDS, Agricultural, Allied Health, Anthropological, Archaeological, Architectural, Art, Asian American Studies; Fund Code: Equals, Does not equal. The bottom panel has: Classification: LC, NLM, Dewey; Classification Criteria: (partially visible); Interdisciplinary Criteria: Matches any, Matches all, Does not match any, Does not match all; Fund Code: Equals, Does not equal, with the text 'AJK COMM' entered in the field. A blue oval highlights the 'Classification Value' field in the top panel, and another blue oval highlights the 'Or...' button below it. Red arrows point from the 'Fund Code' field in the top panel to the 'Fund Code' field in the bottom panel.

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.

Delivery Format

- Email with link
- HTML
- PDF
- Tab delimited
- No email alert

mmoaayyy
mmddyyy
Preview...

Users

- Admin, Temp
- Burge, Peggy
- Carlin, Jane
- Firman, Peggy (GobiAlert)
- Firman, Peggy
- Gratton, Elin
- Kueter, Andrea
- Kuglitsch, Rebecca

Recipients

- Firman, Peggy (GobiAlert)

Faculty Recommendations

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

The screenshot shows a library alert interface. On the left is a sidebar with a 'Marked Items: 1' section containing options: Email, Save To Disk, Print, Remove, Sort, Mark All, Unmark All, Notification List, and Recommend. A red arrow points to the 'Recommend' button. The main area displays a book record for 'LEARNING CULTURE THROUGH SPORTS: PERSPECTIVES ON SOCIETY AND ORGANIZED SPORTS.' by Sandra Spickard Prettyman, published by Rowman & Littlefield in 2011. The record includes details like ISBN (9781442206311), binding (Paper), and subject headings. At the bottom, there is a table with columns for Subaccount, Quantity, Fund Code, and Location.

Subaccount:	Quantity: 1	Fund Code: SOC	PO N
Note to YBP:			
Location:			

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.

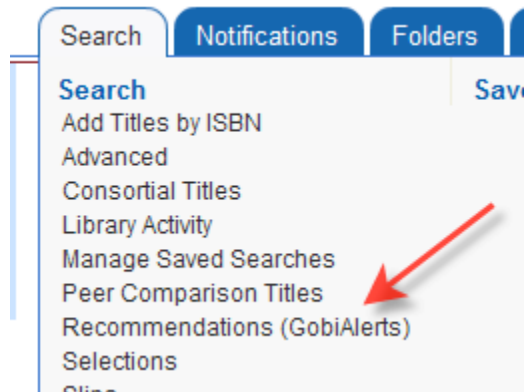
Note that faculty are not actually interacting with Gobi and so may get a message like this if they try to click on a link that requires them to enter Gobi.



- 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.

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.



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.