

Setting up Gobi3 for First Time Success!

Before beginning ordering, I suggest you do the following:

- Set your preferences
- Set up GOBI order templates
- Set up some folders

When you open Gobi3, you will see the following tabs at the top of the screen.



Set up Gobi preferences

Click on the *Options* tab

Choose *My Preferences*

- Look at the *Bibliographic Display Preferences*. Best practice will be *Library of Congress, ISBN-13/EAN and USPrice...*. Please be sure you do not select only *the UK Price*.
- Look at the area under *General Cart Preferences*
- Under *Default title view for list results*, best practice to begin with is selecting *Brief*.
You can return and change if you discover you prefer something else, but brief will allow you to see GoBetween, use the ISBN search to link to our catalog, and also see if we have already purchased the item
- Best practice to begin with is to *Automatically unmark items after each action*
- Look at the area under *Selecting/Ordering Preferences*
- Best practice to ignore *Automatically email transaction acknowledgements*
Our library has a process to notify selector monthly when the title is cataloged. However, this is a personal call.
- Under *After submitting transactions*, best practice is to *Save acknowledgements*
- Under *Number of days to keep transaction acknowledgements*, your choice should depend on how often you think you will be in Gobi3 to see them

Please ignore *eBook Preferred Purchase Option* for now. More information will be sent to you later.

Once the preferences look right, click *Save* in the left menu. It is easy to make changes if necessary.

Set up Gobi3 templates

Best practice to start will be to set up templates for each dept., since each has its own internal fund code. You will have to change the selector name in many cases, but it will be easier to do that than make and scroll through 100 templates.

Click on the *Options* Tab.

Select *Manage Templates*

To create a new template:

- Click on the *New* button in the left margin.
- Enter a name. Best practice would be to enter the Dept name and your initials Example: Education AK.
- Enter the desired order details. Note this information goes directly into the Millennium order record. Be precise.
 - Subaccount: **8186-10** (firm orders)
 - Quantity: **1**
 - Fund code: **select appropriate one from list at end of document**
 - Location: **mmain** (or other if known, e.g. mref for Reference account)
 - Selector: **your UPS email prefix** (e.g., pburge or ricigliano)
 - You will need to change this field with every order when the selector changes. But having the selector name as default will mean that no selection comes in without an owner. When changing the selector, note that accuracy is very important, as this field drives the autonotification delivery.
 - Vendor code: **m0167**
 - Internal note: (you would only pre-fill this if you had a note you wanted to always appear)
- Click on the *Save* button in the left menu.

To edit a previously created template:

- Click on the radio button next to the template you wish to edit.
- Click on the *Edit* button in the left menu.
- Make your changes.
- Click on the *Save* button in the left menu.

To delete a template:

- Click on the radio button next to the template you wish to delete
- Click on the *Delete* button in the left menu.

Sample Template

Template Name* PF GENERAL <small>up to 25 chars</small>	<input type="checkbox"/> Make this the Go
Subaccount 8186-10 US FIRM ORDERS ▼	Quantity 1
PO Number <input type="text"/>	
Fund Code mgeb	
Note to YBP <input type="text"/>	
Location <input type="text"/>	
Selector firman	
Vendor Code m0167	

Default template:

It is best practice to also have a default template set up with Subaccount, quantity, vendor code and selector (you). The only missing data will be the fund code. You can use this for your GobiExpress default, if you like.

Important: The information shared above works for most firm orders for normally allocated funds. If you are using numbered or gift accounts, trying to purchase replacements, or doing other non-departmental activity, you will need different data in your templates, especially in fund codes and vendor codes. Please talk with the Supervisor of Acquisitions before setting up templates for that kind of purchase.

Set up folders

Folders store lists of titles. There is no size limit. These can be built one at a time within the folders menu or as needed during search and reporting functions. They are easy to add and easy to delete.

Go to the *Folders* tab

Select *Manage My Folders*

Select the *New* button in the left menu

- Input meaningful name. Best naming practice is all capital letters, initials first, then folder name. (e.g. AK EDUCATION SECOND TIER or PF MAPLELEAF or LR TEMP). Keep in mind that the title should be meaningful to the audience. If you are not planning to share, then PF MAPLELEAF might make sense. If you are planning to share you would want to be more intuitive to all users.
- Choose a radio button to Make folder visible
- Best practice is to select *Shared folder* so Acquisitions or other Gobi3 users are able to access the folder. Note they will be able to add and remove contents.

- There is no way to rename a folder aside from creating a new folder, moving all the contents and deleting the old folder.
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Note: Finally, be careful with deleting folders. Only the owner of a folder can delete it, but you are not cautioned and it will delete the folder with all contents. There is no retrieval of lost work.

Overview of Gobi Selection Processes at University of Puget Sound

Begin in Gobi 3 www.gobi3.com or www.ybp.com . You will need your account number : 8186, your user name and your password.

How you choose to use Gobi will depend on what you are trying to do. Below are just a few options.

Select a single known title.


Click on *Standard Search*



Quick Search:

Go

- > Standard Search
- > Advanced Search
- > Slip Search

Best practice is to use *Title begins* if you know the title you want. You can also search here for ISBN or do research on elements of the title. After finding a desired title (either by searching, or viewing the folder), click on the  rocket emblem in the left navigator bar for GobiExpress. It will pull up an “Order Details” screen and you can choose a template that will self populate most of the order, if you have templates set up. Once you review the information and fill in any additional data, Scroll to the bottom of the “Order Details” screen and click “Select.” This title will now be reviewed by Acquisitions and the order forwarded to YBP.

Select multiple titles for later consideration from a search on subject or other parameters

Click on *Advanced Search*



Quick Search:

Go

- > Standard Search
- > Advanced Search
- > Slip Search

Advanced search allows you to formulate a query which will usually return multiple results. Note there is no ISBN searching or specific title searching. For that, you would use *Standard Search*. The first step is to specify search results be: sent to a folder that is already created (see instructions in Setting up Gobi3 for First Time success!); sent to a new folder (you make it on the fly); or sent to the current Gobi screen. You make this selection with each search, at the top left of the screen.

Deliver

In GOBI

To a new folder named:

up to 25 chars

To folder:

PF TESTING ▼

Best practice is to send search results to a folder until you are adept at using the search functionality. Some of the searches can take a little while to run.

To create search:

- Specify Universe
- Select Date Range
- Select any other parameters you want and deselect any pre-selected criteria that you do not want.

The more specific your search, in terms of date and universe, the less time it will take. If you are having the search moved to a folder, be sure to look in your junk email folder and save DoNotReply@ybp.com to the *Safe Senders* list in Outlook or you may not get your email notifications.

As you look through the results and find a title you wish to order, mark the title by clicking on the bar at either side of the record (it is more noticeable to the right.)

sorted by title ascending

Title: CRISIS MUSIC: THE CULTURAL POLITICS OF ROCK AGAINST RACISM.	
Author: GOODYER, IAN	
Publisher: MANCHESTER UNIV PRESS	Place of Publication: MANCHESTER
Pub Year: 2009	ISBN: 9780719079245
Binding: Cloth	Country Of Origin: UK
Content Level: ADV-AC	Pagination: 166 P.
LC Class: ML3918.R63	YBP Select: Research-Recommended
Subject Headings: ROCK MUSIC--POLITICAL ASPECTS--GT. BRIT.-- HIST.--20TH CENT.	
YBP Interdisciplinary Topics: Historical; Music; Political; Ethnic Studies	
Approval Note: REV. DISS. EXAMINES POLITICS & MUSICAL INFLUENCE OF 1976-81 UK PUNK/REGGAE CAMPAIGN AGAINST RACISM.	
Format: Revised dissertation	
Geographic Focus: United Kingdom	
Language: English	
US List: 84.95 USD	US Status: In Stock
Handled On Approval YBP-US: 11/25/2009	Rush: Available
UK List: 60.00 GBP	Last Received YBP-US: 6/11/2010
Handled On Approval YBP-UK: 9/2/2009	UK Status: In Stock
	Last Received YBP-UK: 7/8/2010
Added To List: 12/15/2009	
Library Note: Add...	











[GobiTween \(4 Books/11 Slips\)](#)

[library activity \(71 sold\)](#)

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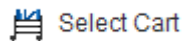
[book jacket](#)

The left bar will darken to navy blue, and that indicates a marked record. When you are finished reviewing the records on that page, you can move marked records to either *Add to Folder* or *Put in Select Cart* by making a choice from the left bar.

<p>Marked Items: 1</p> <ul style="list-style-type: none"> Put In Select Cart GobiExpress Add To Folder Email Save To Disk Print Remove Sort Mark All Unmark All	<ul style="list-style-type: none">• Best practice is to <i>Add to Folder</i> if you want to ponder selections, look up reviews, review/balance costs or share results.• Use <i>Put in Select Cart</i> if you are ready to submit your selections to be ordered.
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Adding Order Information to Select Cart Choices

Go to the Select Cart by clicking on the icon in the left bar.



In the select cart, highlight one or more selections that share department/fund values to which you wish to add order data. Note that you can have multiple departments in the select cart at one time, but you will have to add the order information in batches that reflect the appropriate fund code.


Once you have highlighted at least one title, the left bar will contain an icon to *Enter Order Details*.

Enter Order Details

- Click on *Enter Order Details* (remember to be accurate: this populates the order!)
- Choose a Template, the template will self-populate most of the order
- Add or modify any information that needs to be noted, typically
 - Selector email prefix, such as konto or eemoss
 - Internal note about faculty publication, Edition requirements
- Click *Save* at the bottom of the screen in the blue bar.

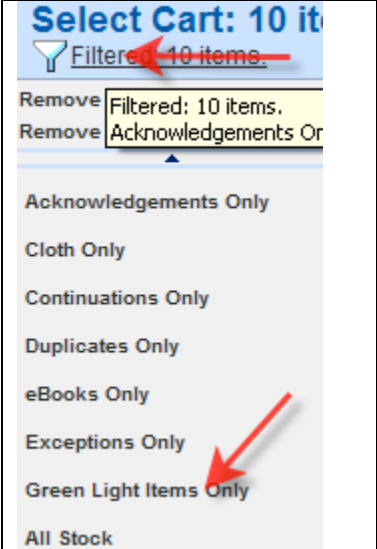
When you have completed the order information for one or more selections a green traffic light will appear in the margin of the record. To finalize your selections so that Acquisitions can pick them up, you must click on the left bar *Submit all Green Lights*

A screenshot of a library's Select Cart interface. On the left is a vertical toolbar with icons and labels: "Marked Items: 0", "Enter Order Details", "Add Unlisted", "Add To Folder", "Email", "Save To Disk", "Print", "Remove", "Sort", "Mark All", "Unmark All", and "Submit all Green Lights". A red arrow points from the "Submit all Green Lights" button to a green traffic light icon in the margin of a record. The record details are: Title: AGE OF OBAMA: THE CHANGING PLACE SOCIETY, Author: CLARK, TOM, Publisher: MANCHESTER UNIV PRESS, LC Class: E184.A1, Content Lev, US List: 19.95 USD, US Status: C, UK List: Not Known, UK Status: I, Est. US Net: 16.46 USD, Added To List: 8/26/2010, Slip Date: 6/30/2010, Slip Subacc, Library Note: Add... (with a link slip sent(6/30/2010)), Subaccount: 8186-10, Quantity: 1, Note to YBP, Vendor Code: m0167, and Internal note 1: 590 note: Gift of Peterson. The toolbar is sorted by title ascending then by title ascending.

Marked Items: 0	sorted by title ascending then by title ascending
	Title: AGE OF OBAMA: THE CHANGING PLACE SOCIETY. Author: CLARK, TOM Publisher: MANCHESTER UNIV PRESS LC Class: E184.A1 Content Lev US List: 19.95 USD US Status: C UK List: Not Known UK Status: I Est. US Net: 16.46 USD Added To List: 8/26/2010 Slip Date: 6/30/2010 Slip Subacc Library Note: Add... slip sent(6/30/2010)
	Subaccount: 8186-10 Quantity: 1 Note to YBP: Vendor Code: m0167 Internal note 1: 590 note: Gift of Peterson

If you have chosen to receive Selection Acknowledgements in your Preferences, you will now see them in your Select Cart at the top of each record.

Additional Tip:

	<h4>Using the Filter</h4> <ul style="list-style-type: none">• You can use the filter icon in the top blue bar to find any non-ordered materials by clicking on the icon and selecting <i>Green Light Items Only</i>• Be aware that once you apply a filter, other materials in the cart do not display. Always check to see if your Cart says<ul style="list-style-type: none">• <i>Filter: Unfiltered</i>• <i>Filter: # Items</i>• Remove Filters by clicking on the filter icon and selecting <i>Remove Applied Filters</i>
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Moving Orders from Folders to Select Cart

- Mark the title(s) you wish to move individually (by clicking on the bar at either side of the record) or collectively by selecting *Mark All* from the left bar.
- Click on *Put in Select Cart*
- Go to *Select Cart* to view your selections and/or apply order details if those details are lacking.

For 2010/2011 fiscal year

\\merlin2\newlibdata\Acquisitions\Fiscal\2010-2011\Fund_Codes_ShortList.docx

Codes for firm order book purchases only.

AFRICAN-AMERICAN STUDIES	maab
ART	marb
ASIAN STUDIES	masb
BIOLOGY	mbib
BUSINESS & LEADERSHIP	mbub
CHEMISTRY	mchb
CLASSICS	mclb
COMMUNICATION STUDIES	mcmb
COMPARATIVE SOCIOLOGY	mcsb
ECONOMICS	mecb
EDUCATION	medb
ENGLISH	menb
ENVIRONMENTAL STUDIES	mevb
EXERCISE SCIENCE	mesb
FOREIGN LANGUAGE	
French	mflbf
German	mflbg
Spanish	mflbs
GENDER STUDIES	mgdb
GENERAL	mgeb
General library subjects only	mgelb
Replacements	mger
Tools (w/Peggy F. approval)	mget
GEOLOGY	mggb
HISTORY	mhhb
HONORS PROGRAM	mhob
HUMANITIES	mhub
INT'L POLITICAL ECONOMY	mipb
LATIN AMERICAN STUDIES	mlab
MATH/COMP. SCI.	mmab
MUSIC	mmub
NEUROSCIENCE	mnub
NEW FACULTY (Expiration date)	
Akers (Math) 09/11	mnfba
Andresen (Psych) 10/12	mnfbc
Demotts (P&G) 09/11	mnfbi
Ingalls (Religion) 10/12	nbfbe


Jacobson (P&G) 09/11	mnfbb
Lewis (Econ) 09/11	mnfby
Mifflin (Chem) 09/11	mnfbm
Morris (Music) 10/12	mnfbo
Nealey-Moore (Psych) 09/11	mnfbn
Odegard (Chem) 09/11	mnfbu
Padula (Music) 09/11	mnfbv
Peine (Ipe) 09/11	mnfbq
Sawin (Math) 09/11	mnfbs
Toews (Math) 10/12	mnfbk
Tromly (History) 09/11	mnfbt
Wolf (Commst) 09/11	mnfbw
OCCUPATIONAL THERAPY	motb
PHILOSOPHY	mplb
PHYSICAL THERAPY	mptb
PHYSICS	mppb
POLITICS & GOVERNMENT	mpob
PSYCHOLOGY	mpyb
REFEFENCE	mreb
RELIGION	mrlb
SCIENCE, TECH & SOCIETY	mstb
THEATRE ARTS	mthb

NEW! October 7, 2010

Special Notes on Best Practices

Thresholds

CDMC is in the process of establishing a threshold for materials in the circulating collections of OrbisCascade. We find that collectively we could save over \$400,000 if we do not purchase copies beyond three. Many of our libraries will be cutting back on their monographic budgets. Please check GoBetween before making a selection and do not purchase anything that has more than 5 copies already in the system. (Note: if you plan on keeping this in Reference or non-circulating collections, this does not apply).

Title: UNITED STATES AND GERMANY DURING THE TWENTIETH CENTURY: COMPETITION AND CONVERGENCE		ISBN: 9780521145619
Editor: CHRISTOF MAUCH		
Publisher: CAMBRIDGE UNIV PRESS	Pub Year: 2010	Binding: Paper
LC Class: E183.8.G3U57 2010	Content Level: ADV-AC	YBP Select: Research-Recommended
Series Title: PUBLICATIONS OF THE GERMAN HISTORICAL INSTITUTE.		
US List: 28.99 USD	US Status: In Stock	Rush: Available
UK List: Not Known	UK Status: Orders accepted	
Est. US Net: 26.09 USD		
Slip Date: 9/22/2010	Slip Subaccount: 8186-11	Slip Discount: 10.00%
 Library Note: Add...		
slip sent(9/22/2010)	alternate editions	GobiTween (2 Books/15 Slips)

Reference works:

Please send all materials you want to purchase with reference funds to Andrea K for approval. She will place the order. Unless you have a long list, the preferred practice is to email a copy of the record to Andrea and ask her to purchase or let you know that they will not.

Reference works: format choice

Liaisons should check to see if Reference works are available in electronic format. Usually that will be the preferred method of purchasing. A list of the electronic vendors we have agreements with is attached. If we do not have an agreement, Acq will bring the licensing terms and access fee information to Peggy F who will consider them before we purchase the item.

Encyclopedias or Dictionaries

While evaluating a possible purchase, librarians should check to see if the title they are ordering from departmental funds is an encyclopedia or dictionary that might be appropriate for reference. If that is the case and they would like it reviewed prior to cataloging, please insert an internal note: Show to AK for Reference consideration.

Works ordered with Reference funds will always be cataloged for Reference.

Recommending purchases

If you are looking at selecting a book that seems appropriate for a different departments fund code, email a copy of the record to the appropriate librarian and ask her to purchase or let you know if she does not plan to honor your request. Suggested subject line for email: Recommended purchase from XX (where XX is your initials)

Requesting library tools

There is a small tools budget which is intended to purchase books about library science, or books that inform our day to day work.

Example titles:

- Copyright law for librarians and educators
- Scenarios and information design : a user-oriented practical guide
- The quality library : a guide to staff-driven improvement, better efficiency, and happier customers

If you believe your title should come out of this fund, please email the request to Peggy F. Please do not try to order them directly using tool funds.

Splitting costs between multiple depts

It is possible to split costs for something between multiple departments. It should not be used frequently, but if you feel it is appropriate, please email the selection to Carmel with instructions as to how you want it split. She will handle the order. If different liaisons funds are involved, please secure agreement before sending it to Carmel.