Retrieving Approval Plan Activity in GOBI

In an effort to adjust our approval plans to better match our budget, Jenny (YBP) has suggested that collection managers look at what titles were received on approval last year, and identify what you’d be willing to have slipped. This can be done easily in GOBI.

INSTRUCTIONS:
Login to GOBI3 http://www.gobi3.com/Pages/Login.aspx
Click the SEARCH tab
Under SEARCH click LIBRARY ACTIVITY

From the Search Library Activity screen complete the following sections:

1. Library Activity = SHIPPED
2. Subaccount = YBP APPROVAL ONLY under drop down menu
3. Date range = under APPROVAL DATE drop down menu, select RANGE then use 2008-09 FY dates (07012008 - 06302009)
4. Ignore “purchase order” and “specify fund code”
5. Fund Code = from menu select PLAN-YOUR FUND CODE (e.g., SSHA-USHI)
6. Click GO (it will take some time to process)

Gobi records for all the titles you received last FY will be retrieved and displayed. Review your results for low priority titles that will help you reduce the number of books received by 50%.
Things to consider eliminating from your profile include:

- Publisher (the easiest way to cut profiles to fit funding is to cut specific publishers)
- Subject/call number
- Content level
- Format
- Geographic focus
- Anything else you consider relevant to your discipline

If you like, save your results in a folder:

1. Click MARK ALL (blue bar indicates they’ve been marked)
2. Click ADD TO FOLDER (the more items the longer the processing)
3. Fill out folder name and other info as you prefer.
4. Click ADD TO FOLDER
5. Saved folders can be retrieved under the FOLDERS tab (it takes a minute or two to process)
6. I then marked, saved, and printed the titles I would not have ordered if I did the selecting. I'll take that list to my meeting with Jenny.

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1 Don’t forget to unclick open orders.
2 Another option is using the subaccount numbers (5916-11 for SSHA and 5916-21 for STAP) in the other box, but since we’ll be searching by fund code, you will get the same results.
3 Invoice date can be used too. Brenda says that the dates only vary 2-3 days.

Added to CMM April 19, 2010