Getting the Most from Alma

Trials and Evaluations

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Contents

Overview 4
The Trial Workflow 4
First Steps – Ordering the E-Resource 4
The Trial Screen 4
The Survey Form 5
The Participants Tab 7
Activating the E-Resource 7
Patron Participation 8
Conclusion 13

Overview

E-resource material is often very expensive, taking up a large part of a library's budget. It is most important for libraries to be able to gauge whether an e-resource package should be renewed, or whether to subscribe to a new package. The option to run a trial or evaluation greatly assists staff in the decision making process. Alma offers sophisticated, comprehensive workflows for managing trials and evaluations.

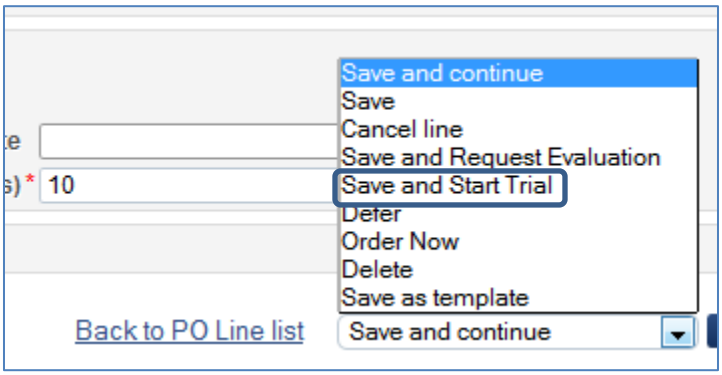
This document shows a step by step trial workflow. The workflow for evaluations is similar – with the difference that the library will assess if an existing e-resource package should be renewed.

The Trial Workflow

First Steps – Ordering the E-Resource

The initial steps for the trial workflow are the same as for ordering an e-resource package. The staff user searches the Alma Community Zone to find the relevant e-resource.

Once found, an order for the e-resource is initiated, and all the relevant fields in the PO Line are filled in. (For more details related to the workflow, refer to *Doing Things Better in Alma – E-Resource Acquisition and Activation*.*)* However, instead of clicking on Order Now, or Save and Continue, choose the option **Save and Start Trial**.

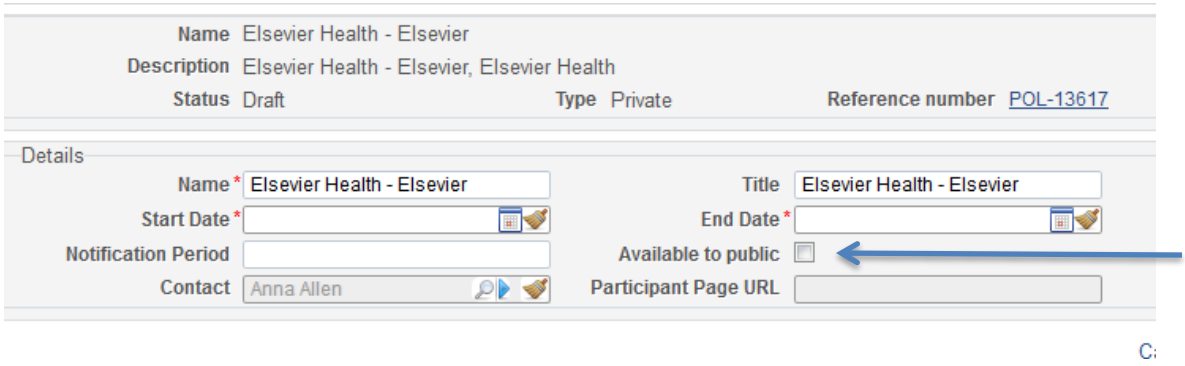


The Trial Screen

After clicking on this option, the first part of the trial screen opens. The start and end dates of the trial must be filled in.

The **Notification Period** defines the number of days before the start of the trial that you want the email invitation sent to trial participants.

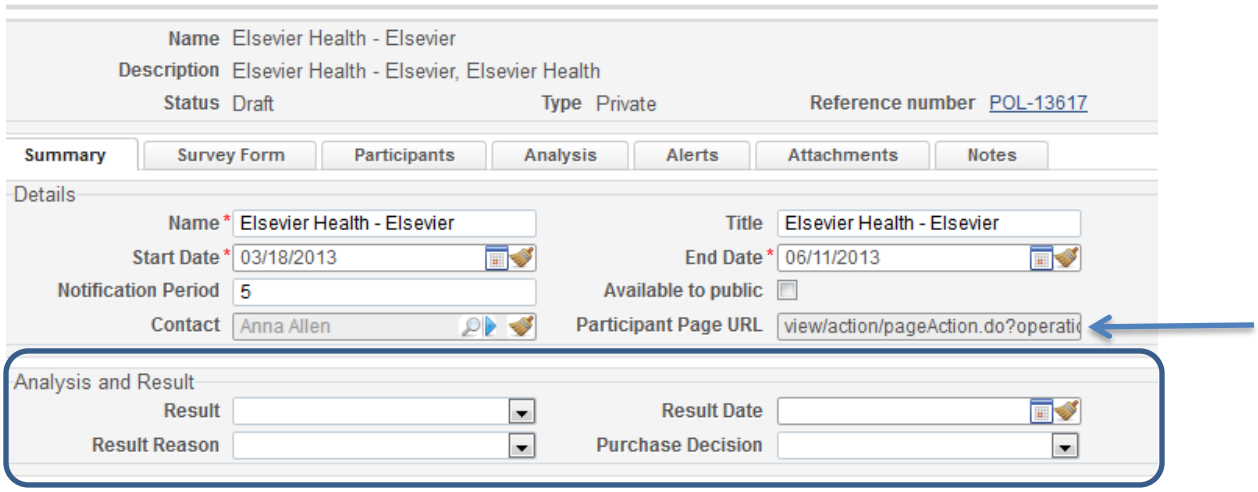
Note the option for defining if the trial will be available to the Public. If this is a private trial, you will have to list the users that will participate in the trial.



Once the necessary details have been filled in, click on the **Save and Continue** button to continue with the trial workflow.

The detailed, tabbed Trial screen displays. The **Participant Page URL** has been filled in with the URL of the related survey form.

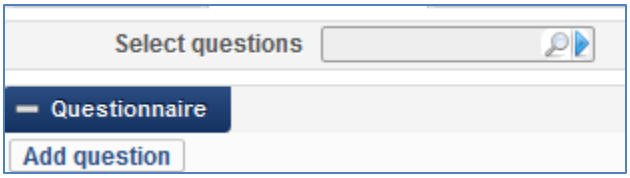
The Summary tab now includes a section – **Analysis and Result**. These fields will be filled in at the conclusion of the trial, after the participants have submitted their survey forms.



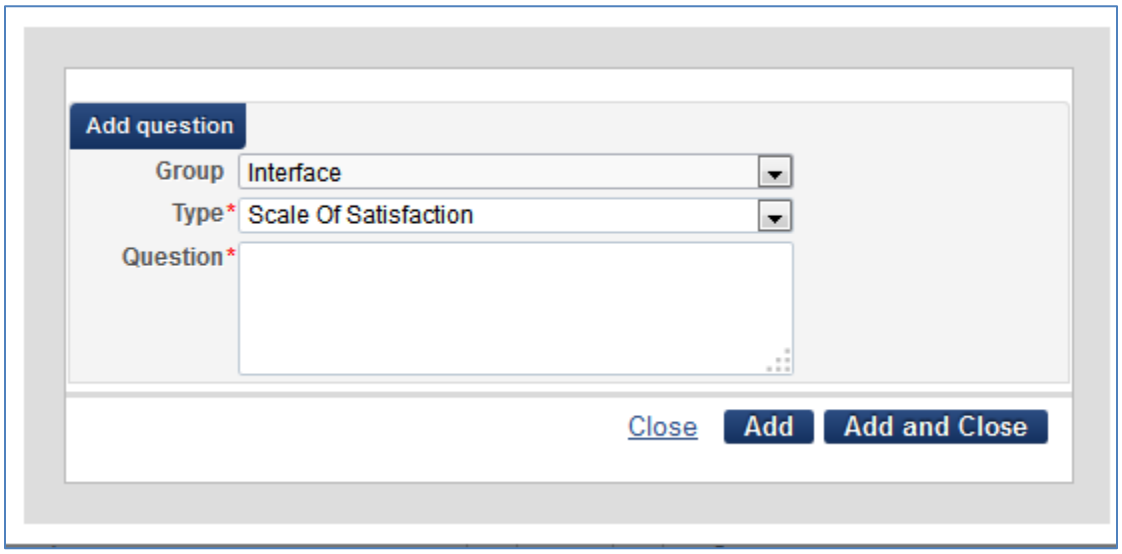
The Survey Form

The Survey Form tab allows the trial manager or operator to either add questions, or to copy questions from a pool of survey questions that were created for other trials. This is a very useful option – in that the questions for all trials are usually common, and it makes for a more efficient

workflow if we are able to copy existing questions rather than having to create new ones for each trial.



When adding a question we have the option of defining if the question relates to the Content, Interface or Conclusion. In addition we can define the type of response required – Scale of Satisfaction, Yes/No or Free Text.

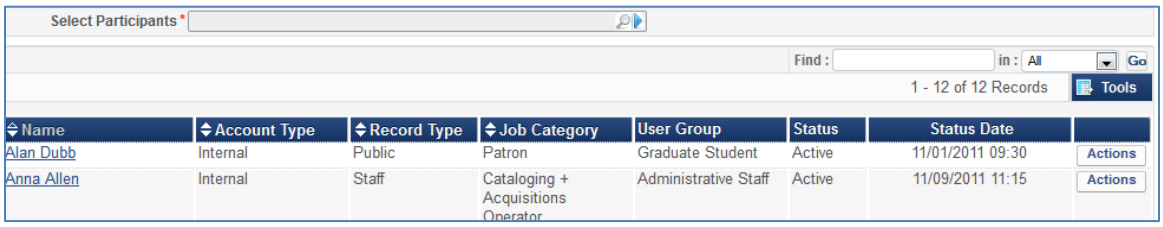


Questions chosen from the pool of questions can be edited and modified if necessary. Note that when choosing from the pool we can see related details (trial and PO Line).

#	Question	Group	Range	Trial Name	PO Line #	Title
1	Which journal titles do you think most useful?	Content	Free Text	Wilson Art Full Text	POL-503	Wilson Art Full Text
1	Do you think the content of this package is valuable	Conclusion	Scale Of Satisfaction	Gale Cengage General Science Collection	POL-13613	Gale Cengage General Science Collection
1	Is the interface user friendly	Interface	Scale Of Satisfaction	Gale Cengage Home Improvement Collection	POL-4610	Gale Cengage Home Improvement Collection
1	Should we buy?	Conclusion	Yes or No	Gale Cengage Shakespeare Collection Periodicals	POL-9807	Gale Cengage Shakespeare Collection Periodicals
1	Should we buy?	Conclusion	Yes or No	Gale Cengage Business ASAP International	POL-2502	Gale Cengage Business ASAP International
1	Please rate your overall satisfaction with this e-book.	Content	Scale Of Satisfaction	netLibrary	POL-3104	netLibrary
1	Is this the needed content?	Content	Yes or No	ProQuest Wilson Applied Science and Technology Abstracts	POL-1201	ProQuest Wilson Applied Science and Technology Abstracts
1	Which journal titles do you think most useful?	Content	Free Text	ProQuest Wilson Applied Science and Technology Abstracts	POL-1201	ProQuest Wilson Applied Science and Technology Abstracts

The Participants Tab

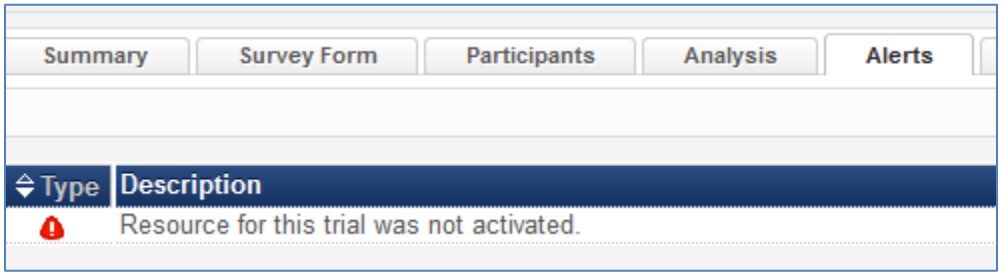
This tab needs to be populated when defining a private trial. The **Select Participants** option allows for searching and choosing multiple users. Use the Find option to search for users/patrons on a one by one basis.



Participants chosen to take part in a trial will automatically have the role Trial Participant added to their user record.

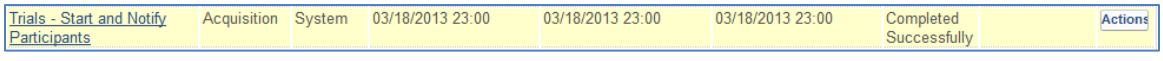
Activating the E-Resource

In order to start the trial, the e-resource must be activated. We can see this information in the **Alerts** tab.

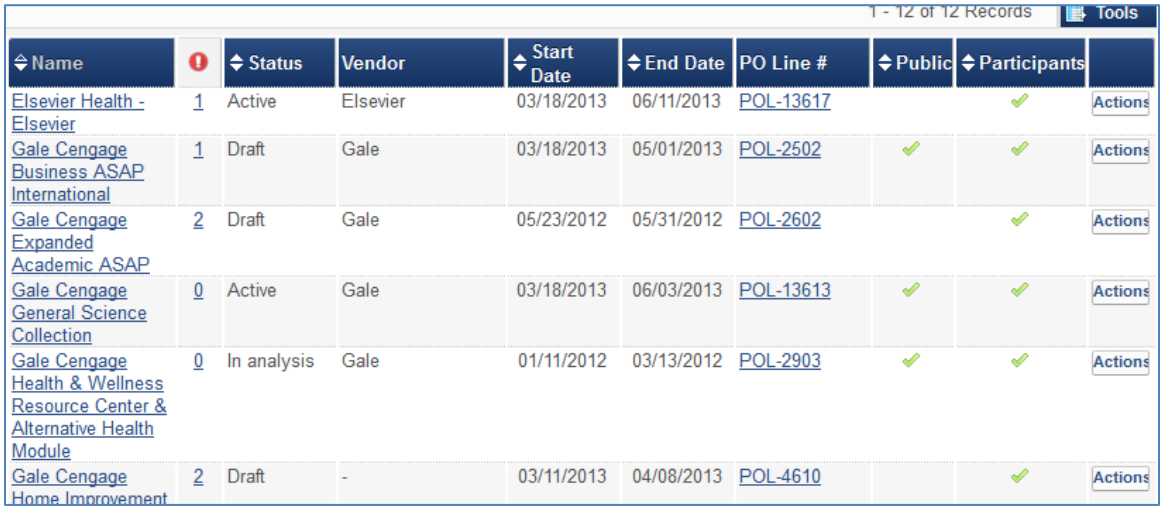


For details of e-resource activation refer to *Doing Things Better in Alma – E-Resource Acquisition and Activation*.

The trial record will have a status of **Draft**. An automatic process run in Alma every night will check the status of all trials, and if relevant will activate the trial and notify trial participants. The status of the trial changes to **Active**.



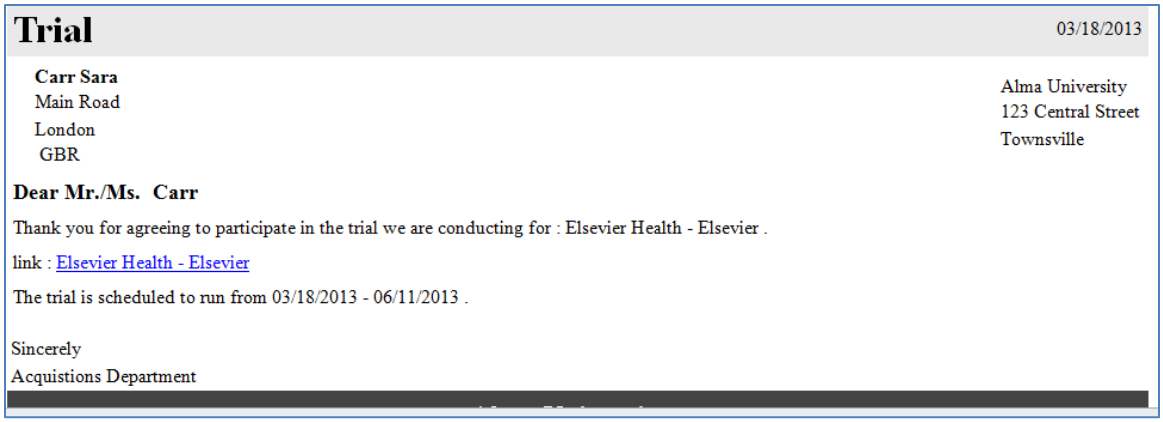
From the Alma Menu -> Acquisitions -> Purchase Order Lines -> Manage Trials we can see a list of trials with summary information about the status of the trial; alerts; start and end trial dates; vendor information; a hypertext link to the related PO Line; and if the trial is private or public.



The **Actions** button offers options to activate the e-resources, or to notify participants about the trial. Note that there is no option to notify before activation, and once the e-resource is activated, this option no longer displays from the Actions button.

Patron Participation

Once the trial has been activated, patrons will receive a notification about the trial with a hypertext link to the survey form that they need to complete.



Trial 03/18/2013

Carr Sara
Main Road
London
GBR

Alma University
123 Central Street
Townsville

Dear Mr./Ms. Carr

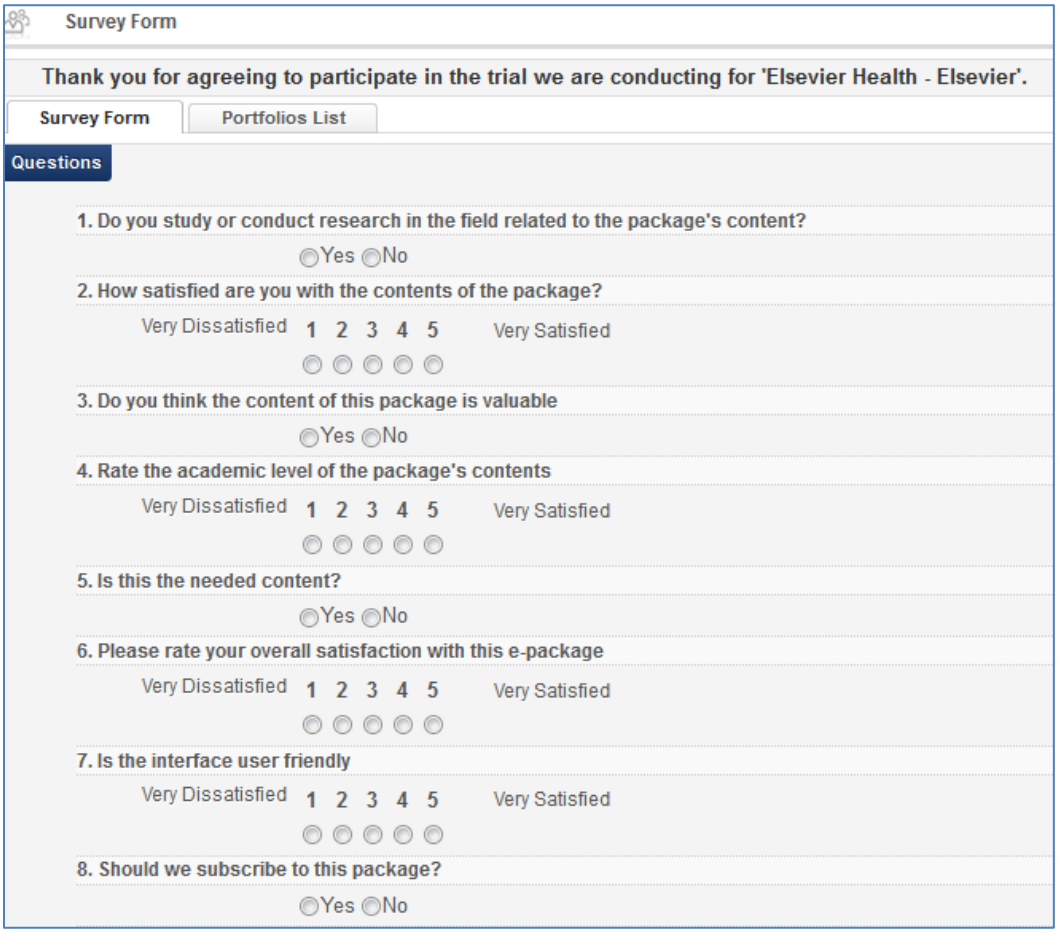
Thank you for agreeing to participate in the trial we are conducting for : Elsevier Health - Elsevier .

link : Elsevier Health - Elsevier

The trial is scheduled to run from 03/18/2013 - 06/11/2013 .

Sincerely
Acquistions Department

Clicking on the package title link will open the web based survey form. The form has two tabs – one for the survey, and one listing the titles in the e-resource package so that the patron may access and view the title, and thus make an informed decision about the package.



Survey Form

Thank you for agreeing to participate in the trial we are conducting for 'Elsevier Health - Elsevier'.

Survey Form | Portfolios List

Questions

1. Do you study or conduct research in the field related to the package's content?
Yes No

2. How satisfied are you with the contents of the package?
Very Dissatisfied 1 2 3 4 5 Very Satisfied

3. Do you think the content of this package is valuable
Yes No

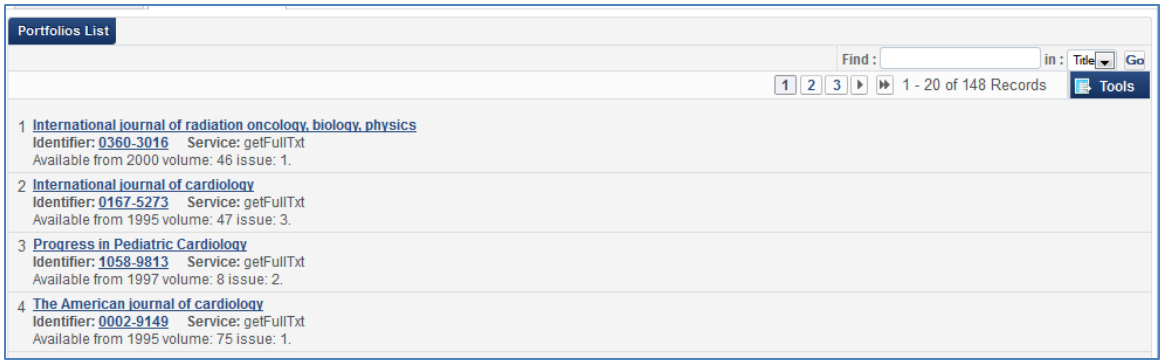
4. Rate the academic level of the package's contents
Very Dissatisfied 1 2 3 4 5 Very Satisfied

5. Is this the needed content?
Yes No

6. Please rate your overall satisfaction with this e-package
Very Dissatisfied 1 2 3 4 5 Very Satisfied

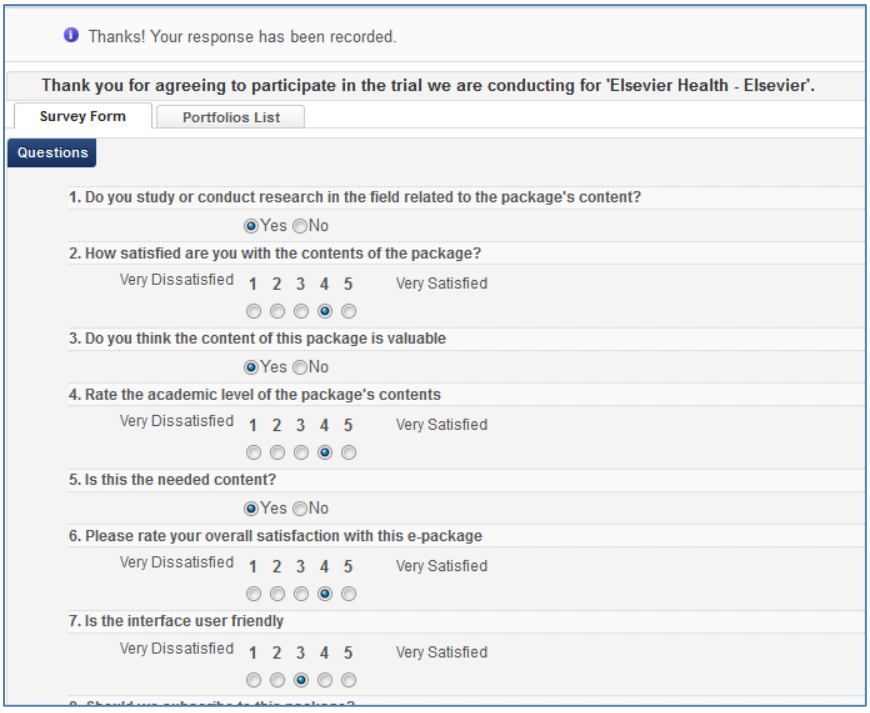
7. Is the interface user friendly
Very Dissatisfied 1 2 3 4 5 Very Satisfied

8. Should we subscribe to this package?
Yes No

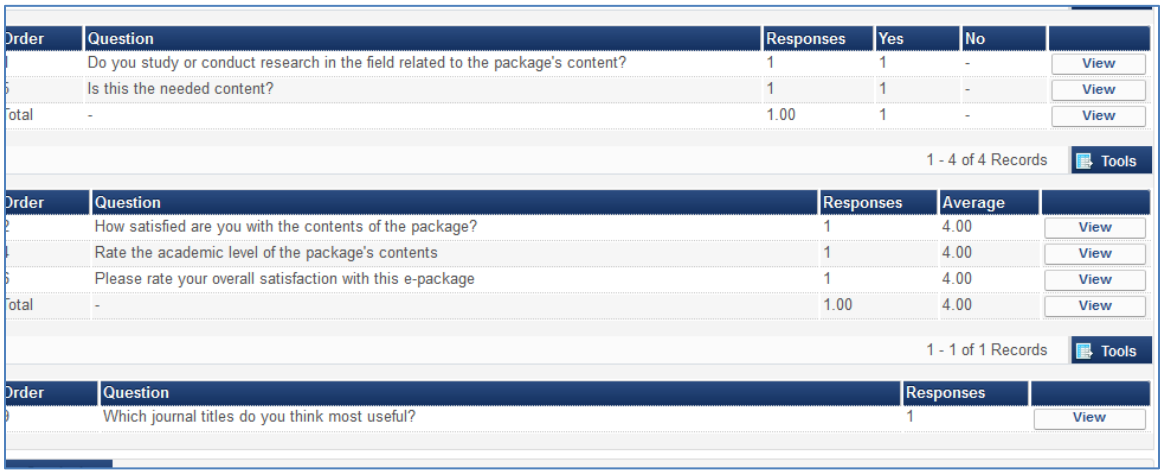


The patron may search for a title using the Find option on the right hand side of the screen. Clicking on any of the journal title hypertext links will open the Uresolver screen. The patron can then navigate to the relevant url to see more information about the journal.

The patron fills in the survey form, and clicks **Submit** to send the completed form back to Alma.



Alma will automatically record the results of the survey:



Order	Question	Responses	Yes	No	
	Do you study or conduct research in the field related to the package's content?	1	1	-	View
	Is this the needed content?	1	1	-	View
Total	-	1.00	1	-	View

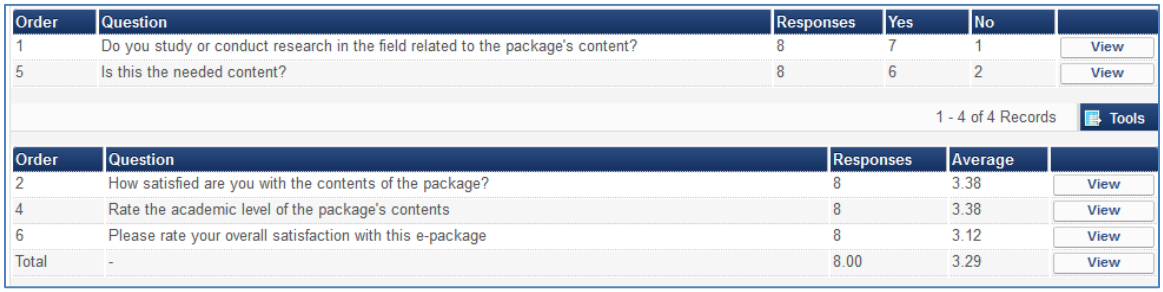
1 - 4 of 4 Records Tools

Order	Question	Responses	Average	
	How satisfied are you with the contents of the package?	1	4.00	View
	Rate the academic level of the package's contents	1	4.00	View
	Please rate your overall satisfaction with this e-package	1	4.00	View
Total	-	1.00	4.00	View

1 - 1 of 1 Records Tools

Order	Question	Responses	
	Which journal titles do you think most useful?	1	View

As more survey forms are submitted, the results on the Analysis screen are updated accordingly. Questions that have a Scale of Satisfaction response will display an average.



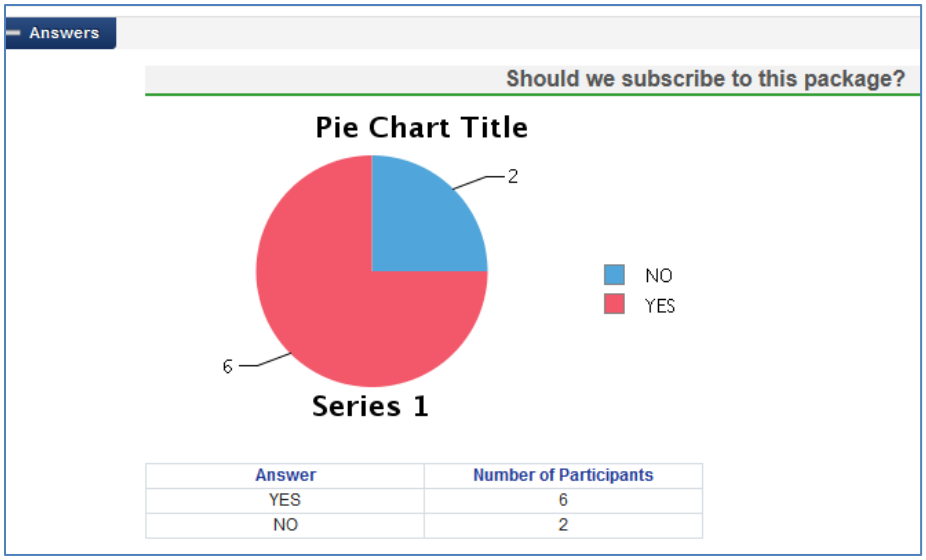
Order	Question	Responses	Yes	No	
1	Do you study or conduct research in the field related to the package's content?	8	7	1	View
5	Is this the needed content?	8	6	2	View

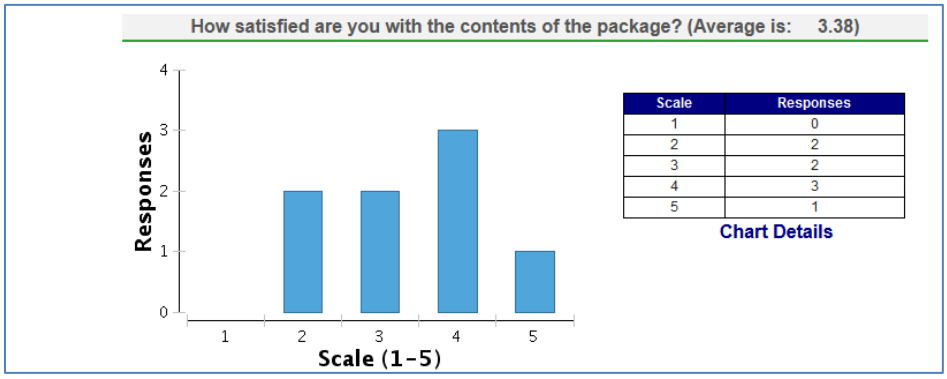
1 - 4 of 4 Records Tools

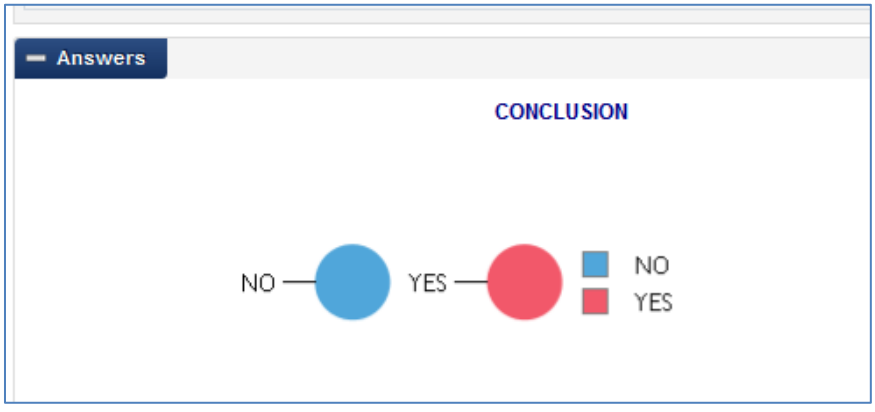
Order	Question	Responses	Average	
2	How satisfied are you with the contents of the package?	8	3.38	View
4	Rate the academic level of the package's contents	8	3.38	View
6	Please rate your overall satisfaction with this e-package	8	3.12	View
Total	-	8.00	3.29	View

Alma also records the number of responses out of the total of the number of participants requested.

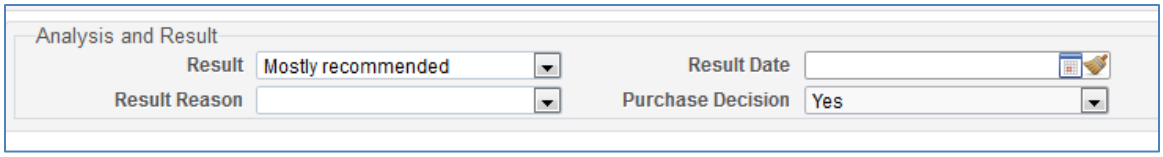
For each response the trial manager or operator has the option of clicking on the View button in order to see a graphic display of the response results. This can assist in formulating a decision about whether to subscribe to the package.







Once survey results have been analyzed, the trial manager can then fill in the decision about the package on the Summary screen.



At the conclusion of the trial the trial manager can **Close** the trial from the Actions button on the Manage Trials screen.

Conclusion

We have seen that Alma has rich and powerful functionality for managing trials of e-resource material. By utilizing the tools and workflows provided by Alma, library staff are aided in the decision making process with regard to subscribing to e-resource material.