Evaluations and Trials in Alma

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New features in this presentation

• Add participants to a trial from a set of users
• Multiple choice questions of type single answer
• Multiple choice questions of type multiple answer
• New sections and layout of the survey form
• A new “Survey form prefix”
• A new “comments” field for specific questions
• Drag and drop to reorder questions
• “Reset Notification” for users who did not receive a letter
• “Hide portfolio” and “hide collection” tab.
• Link from POL to trial
• Tab with number of participants and number notified.
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Introduction

• This presentation will point out new features recently added to the Trials and Evaluations functionality. This will be done within the framework of the creation and running of a trial.
• For a general overview of working with trials see:

https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/020Acquisitions/060Evaluations_and_Trials
• Running a trial in order to evaluate an electronic resource, or collection of resources, is typically done in one of the following two cases:

1. A vendor offers new electronic material to the institution for evaluation
2. A request is received from a member of the institution to have electronic material evaluated

• The evaluation is the workflow of using and evaluating the material.
• A trial is an instance of the evaluation workflow.
• In Alma the evaluation is done via a well defined workflow.
• The workflow of the evaluation determines the way in which a PO line evaluation is handled.
• The evaluation starts at the time the POL is created and ends when a decision is made whether to purchase the electronic material.
• For a diagram of the process see here.
Introduction

• The steps in the process are:
  1. Trial operator / manager receives offer from vendor or member of the institution
  2. Purchase operator creates a POL for the trial
  3. Trial operator / manager creates a survey form and enters trial details.
  4. The POLs may be evaluated
  5. The trial participant is invited to participate in the survey, he completes and submits the survey form
  6. The trial operator / manager reviews the results of the survey forms and makes a purchasing decision
  7. One of the following occurs:
     a) A decision is made to purchase and the standard purchasing workflow continues
     b) A decision is made not to purchase and the POL is canceled.
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Creating the evaluation process

• We will begin the demonstration by creating a new trial.
• This can be done as follows

1. Make POL for purchase type of one of the following:
   A. Electronic title one time
   B. Electronic collection one time
   C. Electronic collection subscription

2. In the POL choose one of the following (both of which are explained in the following slide)
   1. Save and request evaluation
   2. Save and request trial
Creating the evaluation process

• From the POL it is possible to do either of the following

1. “Save and request evaluation”
   a) Can be done by the Purchasing Operator without a Trial Operator role.
   b) The PO line’s status changes to Under Evaluation and moves to the Manage Trials page with the status Requested

2. “Save and start trial”
   a) Can be done by the Purchasing Operator with a Trial Operator role. It will automatically start the trial.
   b) The PO line’s status changes to Under Evaluation and the Trial Details page open
Creating the evaluation process

• We will place an order from the Community Zone for electronic collection (with 8 portfolios) “Alexander Street Press Women and Social Movements in Modern Empires since 1820 – Video”
Creating the evaluation process

- In this case the order is for “Electronic Collection One Time”
Creating the evaluation process

- In the order we will choose “Save and Start Trial”
Creating the evaluation process

- The “Trial Details” page opens. It can be filled in and saved. Here we will fill in initial details and click “Save”
Creating the evaluation process

- The trial will then appear on the “Manage Trials” page. It is accessible from the menu “Acquisitions > Purchase Order Lines > Manage Trials”.

![Diagram showing the menu structure with a highlighted path to Manage Trials]
Creating the evaluation process

- The list of trials appears

<table>
<thead>
<tr>
<th>Name</th>
<th>Status</th>
<th>Vendor</th>
<th>Start Date</th>
<th>End Date</th>
<th>PO Line #</th>
<th>Public</th>
<th>Participant</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alexander Street Press Women and Social Movements in Modern Empires since 1820 - Video</td>
<td>Draft</td>
<td>-</td>
<td>01/01/2018</td>
<td>12/31/2018</td>
<td>POL-189409</td>
<td>✔</td>
<td></td>
</tr>
<tr>
<td>Archive Finder (ProQuest)</td>
<td>Active</td>
<td>PROQUEST LLC</td>
<td>02/05/2015</td>
<td>02/05/2015</td>
<td>POL-162997</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Library and Information Science weekly</td>
<td>Active</td>
<td>-</td>
<td>01/30/2015</td>
<td>02/05/2015</td>
<td>POL-162998</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

We will click “edit”
Creating the evaluation process

• In the “Participants” tab choose the users who will take part in the evaluation.
• If the trial is “public” it is not necessary to add participants because a link to the survey can be sent to the participants (as we will later see).
• For organization or statistical purposes it may be desired in any case to add participants.
Creating the evaluation process

- **New in 2018**: The ability to add participants from a set.
- Use “Add from a set” or “Add participants” to add participants.
Creating the evaluation process

• Here we have clicked “Add from a set” and now we will choose a set named “Users for trial”
Creating the evaluation process

- The participants from the set get added to the trial
Creating the evaluation process

• This is the set of the users who were added.
• Note that there are 3 users in this set

<table>
<thead>
<tr>
<th>Account: All</th>
<th>Role: All</th>
<th>Status: All</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Account Type</td>
<td>Record Type</td>
</tr>
<tr>
<td>1</td>
<td>Wagner, Hannah</td>
<td>Internal</td>
</tr>
<tr>
<td>2</td>
<td>Jackson, Laura</td>
<td>Internal</td>
</tr>
<tr>
<td>3</td>
<td>Chen, Alicia</td>
<td>Internal</td>
</tr>
</tbody>
</table>
Creating the evaluation process

• Additional users (in addition to those in the set) can be added one by one via the “add participants” button. Now we have 5 participants. Three are from a set and two were added manually via the “add participants” button.
Creating the evaluation process

- **New for 2018**: From the POL which is linked to the Trial it possible to click the status “Under Evaluation” and arrive directly to the Trial.
Creating the evaluation process

• After clicking “Under Evaluation” we arrive directly to this:

![Screen shot of a trial management interface with PO line # highlighted.](image)
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The survey questions

- In the “Survey Form” tab choose the questions which will be part of the evaluation.
- In 2018 this tab has significantly changed.
- Formerly it contained just a “questionnaire” section with two options:

1. Select questions (to choose from an existing evaluation)
2. Add question (to add a new question)
The survey questions

• **New in 2018:** the “Survey Form” tab contains three sections:

1. “Form Configuration” section which includes:
   A. Checkbox “hide portfolio tab”. If checked there will be no portfolio tab in the survey form.
   B. Checkbox “hide collection tab”. If checked there will be no collection tab in the survey form.

2. “General information” section which includes:
   A. Select questions (to choose from an existing evaluation)
   B. Add question (to add a new question)

3. “Questions” section which includes:
   A. Select questions (to choose from an existing evaluation)
   B. Add question (to add a new question)
The survey questions

These two sections will appear as separate distinct sections to the end user.
The survey questions

- **New in 2018**: the “Survey Form” contains a “Prefix”
The survey questions

- The Survey Form prefix appears to the user at the beginning of the survey

Important electronic collection for courses in the 'Gender Studies' department

1. This resource is good because
   - [ ] It has valuable content
   - [ ] I need it for my courses
   - [ ] It is always very current
• Also **new for 2018** is the ability to configure multiple choice questions (via acquisitions configuration menu)

• The questions can also be added “on the fly” when adding questions to the trial

![Survey Question Multiple Choice](image)
The survey questions

- The questions can be

1. Single choice (like a radio button)
   A. One answer allowed.
   B. For example “This resource has:” “All of what I need”, “Some of what I need”, “Nothing of what I need”

2. Multi choice (like check boxes)
   A. Multiple answers allowed.
   B. For example “This resource is good because:” ”It has valuable content”, ”I need it for my courses”, and ”It is always very current"
The survey questions

• For example

<table>
<thead>
<tr>
<th>Question Code</th>
<th>Choice Value</th>
<th>Type</th>
<th>Updated By</th>
<th>Last Updated</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>This resource is good because</td>
<td>Multi Choice</td>
<td>exl_impl</td>
<td>08/12/2018</td>
</tr>
<tr>
<td>2</td>
<td>This resource is good because</td>
<td>Multi Choice</td>
<td>exl_impl</td>
<td>08/12/2018</td>
</tr>
<tr>
<td>3</td>
<td>This resource is good because</td>
<td>Multi Choice</td>
<td>exl_impl</td>
<td>08/12/2018</td>
</tr>
<tr>
<td>4</td>
<td>This resource has</td>
<td>Single choice</td>
<td>exl_impl</td>
<td>08/12/2018</td>
</tr>
<tr>
<td>5</td>
<td>This resource has</td>
<td>Single choice</td>
<td>exl_impl</td>
<td>08/12/2018</td>
</tr>
<tr>
<td>6</td>
<td>This resource has</td>
<td>Single choice</td>
<td>exl_impl</td>
<td>08/12/2018</td>
</tr>
</tbody>
</table>

New questions are added here
The survey questions

• Questions can be added to the survey form via “Add from list” and “Add question”
The survey questions

• When clicking “Add question” the choices are “Multi choice” and “Single” choice (as seen previously) as well as “Scale of satisfaction”, “Yes or No” and “Free Text”.
The survey questions

- If we choose “Multi choice” then we can fill it in here or search and take from the configuration table we already filled in.

We can also state it is mandatory to answer and add a comment.
The survey questions

- It is possible to add a single or multi choice question here “on the fly” and it automatically gets added to the table of survey form questions we previously edited.
The survey questions

- The questions we added from within the form got added here

<table>
<thead>
<tr>
<th>Question Code</th>
<th>Choice Value</th>
<th>Type</th>
<th>Updated By</th>
<th>Last Updated</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>This resource is good because</td>
<td>It has valuable content</td>
<td>Multi Choice</td>
<td>-</td>
</tr>
<tr>
<td>2</td>
<td>This resource is good because</td>
<td>I need it for my courses</td>
<td>Multi Choice</td>
<td>-</td>
</tr>
<tr>
<td>3</td>
<td>This resource is good because</td>
<td>It is always very current</td>
<td>Multi Choice</td>
<td>-</td>
</tr>
<tr>
<td>4</td>
<td>This resource has</td>
<td>All of what I need</td>
<td>Single choice</td>
<td>-</td>
</tr>
<tr>
<td>5</td>
<td>This resource has</td>
<td>Some of what I need</td>
<td>Single choice</td>
<td>-</td>
</tr>
<tr>
<td>6</td>
<td>This resource has</td>
<td>Nothing of what I need</td>
<td>Single choice</td>
<td>-</td>
</tr>
<tr>
<td>7</td>
<td>Is this appropriate for undergraduates or graduates?</td>
<td>Undergraduate students</td>
<td>Multi Choice</td>
<td>-</td>
</tr>
<tr>
<td>8</td>
<td>Is this appropriate for undergraduates or graduates?</td>
<td>Graduate students</td>
<td>Multi Choice</td>
<td>-</td>
</tr>
</tbody>
</table>
The survey questions

- When clicking “Add from list” all previously used questions (in all trials) appear and **New for 2018**: it is possible to view the possible answers to the questions.

View possible answers from the list
The survey questions

• **New in 2018**: From the “survey form” tab of the trial it is possible to drag and reorder questions (and change to mandatory or optional from the list)
Introduction

Creating the evaluation process

The survey questions

Trial activation and participant notification

Analyzing the trial results
Trial activation and participant notification

- We have added questions to the survey form tab and added a set of users to the participants tab.
- Now we will activate the resource. Doing ‘Actions > Activate’ from the list of trials activates the resource but not the trial.
Trial activation and participant notification

- After activating we will go through the activation wizard
Trial activation and participant notification

- The job “Trials – Start and Notify Participants” will activate the trials and send a notification to the participants.
- This job activates the trial, not the resource.
Trial activation and participant notification

• The job “Trials – Start and Notify Participants” has completed.
Trial activation and participant notification

- **New in 2018**: In addition to the initial letter, another letter will be sent before the end of the trial according to the field “Remind participants before trial ends (days)**.”
Trial activation and participant notification

- Participants will get one notification automatically via job "Trials – Start and Notify Participants" (or the "notify participants" action)
- Then the participants will get another letter towards the end of the trial.
- For example if field “Remind participants before trial ends (days)” is "10" then participants will get another notification 10 days before the trial ends.
Trial activation and participant notification

- Participant Alicia Chen received her letter
- From the letter there is a link directly to the survey which the participant can fill in and submit.

Dear Alicia,

Thank you for agreeing to participate in the trial we are conducting for: Alexander Street Press Women and Social Movements in Modern Empires since 1820 - Video.

link to trial form: Alexander Street Press Women and Social Movements in Modern Empires since 1820 - Video

The trial is scheduled to run from 01/01/2018 - 12/31/2018.

Sincerely,
Acquisitions Department

YILIS Institute of Library and Information Science
Trial activation and participant notification

- **New in 2018**: If a participant has already been notified but you want to notify him again you can choose “Reset notification”
Trial activation and participant notification

• The next time participants are notified Alicia will receive a letter and the other participants will not.
Trial activation and participant notification

- It is also possible to send a letter to the trial participants via the “notify” option which appears under the “actions” button for active trials in the Trial List.
Trial activation and participant notification

- The survey contains the portfolio list because we did not hide it.
Trial activation and participant notification

• **New in 2018** is the ability to hide the portfolio tab and collection tab from the survey form.
Trial activation and participant notification

- Now the portfolio tab and collection tab no longer appear in the survey form
Trial activation and participant notification

- For the multiple choice questions participants can choose multiple answers

![Survey Form](image)
Trial activation and participant notification

• Note that it is also possible to add a comment field to questions

![Image of question form with options for type, question, question code, and comment field.

- Type: Multi choice
- Question: This resource is good because
- Question code: This resource is good because
- Optional: Answer for this question is mandatory
- Option: Add comment field
- Comment Label: Explain why you think the library should purchase this collection]
Trial activation and participant notification

• The comment field appears and can be filled in as follows to end users:

   ![Comment Field Image]

   - It has valuable content
   - I need it for my courses
   - It is always very current

   **All students will benefit from the content of this collection**
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Analyzing the trial results

• When the responses are sent they are automatically recorded in the Analysis tab of the trial.
• The Trial Operator can then view the results and on the basis of the responses make a purchasing decision
• He can enter the decision in the Analysis and Results section of the Summary tab
Analyzing the trial results

- **New in 2018**: The “Analysis” tab includes a summary of the number of participants and how many have been notified.

![Image of the trial details showing email invitations and total responses](image-url)
Analyzing the trial results

- When the responses are sent they are automatically recorded in the trial.
- Here the trial operator views the results, for example:
Analyzing the trial results

• The comments which the user added in the comments field of a particular question appear as follows in the analysis tab:

<table>
<thead>
<tr>
<th>It has valuable content</th>
<th>I need it for my courses</th>
<th>It is always very current</th>
<th>N/A</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>3</td>
<td>2</td>
<td>0</td>
<td>5</td>
</tr>
</tbody>
</table>

Comments (2)

- All students will benefit from the content of this collection
- We really need the content of this collection
Analyzing the trial results

- It is also possible to export the survey feedback
Analyzing the trial results

- The feedback is exported to a multi-sheet Excel file
Analyzing the trial results

• After viewing the responses and coming to a decision the Trial Operator enters the results and purchasing decision in the Analysis and Results section of the Summary tab.
• The minimum information to enter in this section is the Result and Result Date.
• This is recorded in the Analysis and Results section of the Summary tab.
Analyzing the trial results

- After the results are entered, the PO line is saved.
- If the decision was made to purchase the material then the Purchasing Operator would typically continue in the normal purchasing workflow.
- If the decision was made not to purchase the material, the Purchasing Operator would typically to cancel the PO line.