Setting up Trials in Alma NZ

The steps listed below are adapted to setting up Trials in the NZ but can be adapted for the IZ. For example, a negotiated license wouldn't need to be set up for an IZ Trial.
Trial Configurations:

- Vendor Record
- Negotiated License Record
- Create Set of Trial Participants
    - Optional but suggested if there is a large group of participants
- Configure Trial Email Letter
- Configure Trial Management job
- Order Trial Resource

Vendor Record:

Create Vendor record in the NZ for new vendor. If this is a trial for a resource from a current vendor, a new record is not needed. (Ying)

License Record:

Create the NZ Negotiated License using the subscription information from the vendor. Add each library and the cost for the subscription for each library. Similar set up to creating NZ negotiated licenses for Opt-in resources. (Jessica)

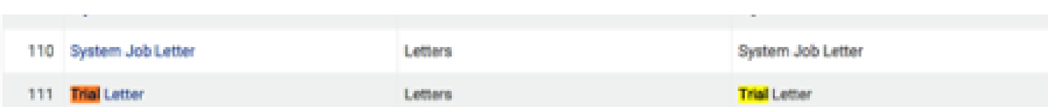
Create a Set of Trial Participants:

There is a How-to document on the Acquisitions and ERM wiki page. The instructions are for creating a User Set in Alma. Users will need to have Trial Participant role.

Configure the Trial Email Letter:

This is the letter that is sent out to the participants of the Trial. The email can include information about the Trial, a link to the portfolios, and a link to the collection. Also included is a link to the survey form. The Trial Letter can be found **Configuration Menu > General > General Configuration > Letter Emails.**

- The Letter is label TrialLetter.



110	System Job Letter	Letters	System Job Letter
111	Trial Letter	Letters	Trial Letter

- Some of the fields available in the Trial Letter:

	Enabled	Code	Description
1		department	Systemwide Digital Library Content (SDLC)
2		linkToCollection	Here is the link to the trial Electronic Collection
3		reminder_register_opinion	If you have not yet registered your opinion, please be sure to do so before the end of the trial
4		Cc	yliu@calstate.edu;jhartwigsen@calstate.edu
5		Bcc	sdlc_trial_and_new_offer@calstate.edu

Activate the Trial Management Job:

The job is labeled: *Trials - Start and Notify Participants* and must be set to Active. The job runs nightly and moves a Trial from Draft to Active. Also, this triggers the Trial Letter to be sent to participants. The Trial is activate and participants can access the collection and portfolios. Participants will also be able to access and submit the Trial survey. This job should be set to Active but if it is not, submit a case to SalesForce.

	Name	Job ID	Job Category	Creator	Submit Date	Start Date	End Date	Status
1	Trials - Start and Notify Participants	14922715400...	Acquisition	System	10/17/2018 09:00:20 PM PDT	10/17/2018 09:02:12 PM PDT	10/17/2018 09:02:22 PM PDT	Completed Successfully

Order the Trial Resource:

User must have Trial Role to manage the Trial:

Acquisitions: Trial Operator and/or Trial Manager

Locate the e-collection in the CZ and **ORDER** the resource, do not activate the e-collection.(Jessica)

- Once the purchase order record is open, locate the NZ license for the Trial and add it to the POL.
- Add the Vendor Record, the cost of the resource, and the fund.
  - Use the Opt-in fund since this is where the funds will come from if the library chooses to subscribe after the trial period.
- Choose Save and Start Trial
- Go to Acquisitions> Purchase Order Lines > Manage Trials
- Locate the new e-collection in the list of Trials and click Edit
  - Add start and end date of the Trial
  - Enter name of main contact person
  - Edit the Trial survey form under the Survey Form tab in the Trial.
    - The form will be created and maintained by Ying Liu. Please contact Ying if there are any questions about the form.

Questions

Add from list Add question

	Question	Type	Question code	Mandatory	Comment
1	Are you satisfied with the over all streaming experience?	Yes or No			
2	Is the content easily integrated with course work?	Yes or No			
3	Are you satisfied about the content covered in this collection?	Yes or No			

        - Choose whether or not to make the trial survey form available to the public.
            - Currently the Trials survey will not be made available to the public.
                - If the trial is private, the participants receive an email invitation to participate in the trial.
                - If the trial is public, you can publish details of the trial (on your internal web site or by email, for example) and invite members of the institution to participate. The URL for the trial uses the path in the **Participant Page URL** field on the **Summary** tab of the Trial Details page, as follows: https://<Alma domain>/<participant page url>. Anyone with the URL can participate in the trial.
            - The survey form will only be available to those users included in the Set of Participants. A link to the survey will be included in the email.
            - Add participants or create a set of participants to be notified of the Trial. *Participants must have Trial role: **Admin>Manage Users>Locate User>Check Trial Participant role**
                - Set of participants have been created from the Collection Development and EAR member lists maintained by Ying Liu. If your name is not on that spreadsheet, please notify Ying that your name should appear on the member list.
                - If you would like to opt-out of NZ trials, please contact Jessica Hartwigsen to remove your name from the set of trial participants in Alma. If your name is not on the EAR or CD lists but you would like to participate in the NZ Trial, please contact Jessica Hartwigsen.

- Trials must be set to Active before the form will be available to Participants.
    - A job is run nightly that will change the Trial from Draft to Active
        - For notifications to be sent, the Trials -Start and Notify Participants job must be marked Active on the Monitor Jobs page. Trials must be full text e-collections (have portfolio).
        - *Will not leave Draft status if only a database-only resource. The workaround is to add a dummy portfolio to the e-collection.
    - A Trial Letter should also be set up to be sent out to participants after the job is run and the Trial is set to Active.

        - The notification sent is the Trial Letter and can be configured. Ying Liu will be making updates to the [Trial Letter]sent out to participants.
    - The Trial Letter will contain some information about the trial as well as a link to the Trial survey form and the e-collection.
- Participants can complete in the Trial Survey Form after testing the Trial. There will be questions about whether or not the library would like to subscribe to the resource.

The following steps would specific to NZ trials and how to move forward with making the Trial resource and Opt-in resource in the NZ.

- If SDLC is able to move forward with the new Opt-in resource after the Trial period, the POL will be updated from Under Evaluation to Active. The POL can be updated until after the Trial End Date.
    - Go the Summary tab of the Trial and go to the Results section at the bottom of the tab.
    - Enter in the final results of the subscription.
        - If there are libraries that want to move forward with the subscription, change fill in the Purchase Description to Yes.
        - Move forward to Step 2 of the [Purchasing Workflow] after saving the changes to the Trial.
- After the Trial is complete and there are libraries that want to subscribe to the resource, they resource can be ordered from the NZ similar to ordering an Opt-in from the NZ.
- The e-collection can be made available to the public in Primo/OneSearch during the trial period.
    - Library names will need to be added to the e-collection Service Group Settings.
    - Libraries that are not included in the Group Settings will not see the resource in OneSearch.

FINDINGS AND CONCLUSIONS

- ❑ The Survey Form link, in the email notification, will only work if the Trial is set to Active.
- ❑ Trials only work with full text e-collections. Can add a portfolio placeholder to make database-only e-collection work with Trials.
- ❑ The Trial Survey can be made available to the public.

- The e-collections can be made available in Primo or remain inactive. The e-collection status does not affect the Trial status or access to the survey form.
- The Notify button in Edit Trials does not send out notifications. The job needs to be reset. See instructions below.
- The collection level link is not being picked up by the Trials if it is in the Level URL Override field in the collection. *Waiting to hear back from ExL Support.
- The NZ Survey Form can be accessed by any participants, users do not need access to the NZ to use the form.
- Continue to work with SDLC to discuss how best to utilize NZ Trials.

Reset the Notify button in Manage Trials:
https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/020Acquisitions/060Evaluations_and_Trials/020Managing_Trials#Analyzing_Trial_Results

(you will need to scroll up just a little bit)

This section reads, "If a checkmark appears in the Is Notified column, the user has already received a notification. Another notification will not be sent to the user when notifications are sent out. To reset a user so that they will receive another notification, either select Reset Notification on the row action list, or select a group of users and select Reset All Notifications from the view action list."