Alma Essentials – Acquisitions

Starting and Managing Trials

Hi, in this session we'll learn how to start and manage trials in Alma.

Some vendors offer access to electronic resources for a limited evaluation period. You can set up a trial in Alma to manage the evaluation process and gather feedback from select people in your institution, to help with the purchasing decision.

To set up a trial, find the electronic resource for evaluation in the Community Zone and click Order to create a Purchase Order Line. Fill in the PO Line details as you would when ordering any electronic resource .

Once the PO Line is complete, if you have the Trial Operator or Manager role, you can click Save and Start a Trial. If you only have the Purchase Operator role, you have the option to click Save and Request Evaluation. Then a colleague with the Trial Operator or Manager role will start the trial under Acquisitions > Manage Trials. In our case, let's Save and Start a Trial.

In the Trial Details panel, fill in the Start and End Dates for the trial. You can make the trial Available to public, or leave it private for invitees only. Alma can send a reminder email to trial participants to provide their feedback, at the specified number of days before the trial ends. Click Save and Continue.

Next, let's create the feedback survey for trial participants under the Survey Form tab. In the General Information and Questions sections, you can add questions from a preconfigured list, or add questions of your own. You can designate questions as mandatory, and comments may be added as well.

Under the trial Participants tab, you can add multiple participants from a set of users, or add individual users.

Back in the Summary tab, you can copy the survey link to provide to trial participants. Having completed the Summary, Survey Form, and Participants tabs, click Save.

Under Acquisitions > Manage Trials, we can find our trial.

Let's take a look at our survey form via the link we just copied. As you can see, the questions we configured are presented to the users. Participants can access the inventory from the Portfolios List and Electronic Collection tabs. They can fill in their feedback here, and Submit. If we are content with the survey configurations, we can continue setting up our trial.

Back in the Manage Trials page, our trial remains in Draft status until the electronic resource is activated and the Start date arrives. So let's activate the Resource under Options > Activate. Confirm.

If you wish, you can edit the activated resource now, or close this dialog. Upon activation, participants are notified that the trial has started. You can also send a notification under Options > Notify Participants. The trial status is now Active or In Analysis until a purchasing decision is made.

Trial participants should submit their feedback before the trial's end date.

When a trial ends, you can edit the trial to evaluate the feedback in the Analysis tab. Here we can see charts of participants' responses to each question. The results can also be Exported to an Excel spreadsheet.

After reviewing the results, go back to the Summary tab to make the purchasing decision. Select the appropriate Result, such as Mostly recommended, and the Result Date. If no decision is made, the trial can remain on the Manage Trials page. Otherwise, select the appropriate decision and Save your edits.

If the decision is not to purchase, a purchasing operator can cancel the PO Line. If the decision is to purchase, the PO Line continues to the next step of the purchasing workflow, where it is packaged into a purchase order.

Thanks for joining!