Trial license survey with response goal tracking

Overview

With this survey feature, your library can manage the survey process and establish a point of access for all library-sponsored database trials. A trial license survey lists all collections, collection links, and public notes associated with active trial licenses found within WorldShare License Manager. A collection remains on the survey until the trial license has expired or the collection is deselected.

This feature provides:

- Secure API connection from a remote library web page which lists all active collections and writes user responses back to the license within License Manager
- Customizable survey categories including user roles, rating values, and a free-text comment field from which to gather user feedback on individual collections
- An optional, customizable response goals feature to alert the survey’s creator when predetermined response totals have been met for a trial
- Response summary visualization and details from gathered survey data

Note: The Trial Licenses button is available only to WorldShare users with the ERM_ADMIN or ERM_SUPERVISOR roles. Users with the ERM_STAFF role will not see this survey editing functionality but will see the survey responses on individual trial licenses.

Before you start

Before you create a survey, you will want to do the following:

- Configure your trial licenses within License Manager
- Decide which roles to list as choices for participants to select
- Decide the number of responses to collect before notifying the survey creator of the results
- Determine which website domains will be used for the trial

Your first survey

The first time you create a survey, you will use the Trial Licenses wizard. For all surveys after that, you will edit your existing survey.
1. Survey display

- In the left navigation, under Licenses, select **Trial Licenses**.
- The Trial Licenses wizard opens to the Survey Display dialog box. You will enter the following:
  - **Roles**:
    - Click the checkbox for **Allow respondents to indicate their role** if you want to gather information about the respondents' roles.
    - Click the checkbox for **Role is a required field** if you want to require respondents to indicate their roles.
    - In the text boxes, enter the roles the participates will select.
      - The roles you enter will appear in a drop-down list on the survey.
      - Use the plus (➕) button to add or the minus (➖) button to remove a text box.
  - **Ratings**:
    - The survey uses a five-star rating system.
    - You select what terms to display to the users. For example, enter **Low** for the 1-star rating and **High** for the 5-star rating.
  - **Comments**
    - A text box displays on the survey. Comments entered by survey participants only appear in the license. See View survey data.
    - Click **Comments is a required field** to require the users to enter a comment.
- Click **Continue**.

2. (Optional) Response goals

- When enabled, the survey creator will receive an email notification with a link to the license. Survey results appear in the license. See View survey data.
  - To turn on the Set Response Goals, click the checkbox for **Enable response goals**.
  - **Respondent Goals**:
    - Select a role from the drop-down list. The roles listed are the ones you entered earlier on the Survey Display dialog box.
    - Select the number of respondents. If enabled, an email will be sent to the survey creator when the number of responses selected plus one more (n+1) occurs. To receive a notification when the first respondent completes the survey, leave the number of respondents blank.
    - Use the plus (➕) button to add or the minus (➖) to remove a role.
  - **Notifications**:
    - Click the **Once goal(s) are met, an email will be sent to** checkbox if the survey creator wishes to receive a notice. The survey creator is the person signed in.
    - The email address of the person who is signed in is automatically supplied.
- Click **Continue**.
3. Domain settings

- The domain settings are required. You must have at least one domain entered.
  - Domain Name:
    - Enter the name of the website.
    - The name you enter does not appear elsewhere. Entering a name helps you to organize the domains on
      the screen.
  - Domain URL:
    - Enter the base URL of the website. Include the http:// or https:// at the beginning of the web address.
    - Use the plus (➕) button to add or the minus (➖) button to remove a text box.

- Click Create Survey Code.

4. Copy survey code

- The View and Copy Survey Code displays the code you will use on your website(s).
  - The survey code is designed to work with any HTML page or Content Management System (CMS) which
    accepts JavaScript and iframe embed codes.
  - Only one WSKEY is used for the entire list of domains. If you make changes to the domain settings, you will
    need to update your website(s) with a new survey code and associated WSKEY.

- Click Copy Survey Code. The code is copied to your computer's clipboard.
- Click Close.

Manage your trial licenses

Create new/edit existing survey

Note: There is only one survey but you can edit this survey at any time.

When you take action to edit a setting, the system will warn you that doing so will have consequences.

- If you edit your domain settings, the code must be re-copied and pasted into every domain instance in order for the
  changes to be recognized.
- If you edit your survey settings, you will alter the response criteria for all trial databases and licenses from that point
  forward. Your edits will not change the existing response data.

Steps:

1. In the left navigation, under Licenses, select Trial Licenses.
2. From the Trial Licenses screen, open the Trial Licenses Actions drop-down list.
3. Select the action you want to take:
<table>
<thead>
<tr>
<th>ACTION</th>
<th>ACTION/DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Copy Survey Code</td>
<td>The current survey code is copied to your computer's clipboard.</td>
</tr>
<tr>
<td>Edit Domain Settings</td>
<td>Enter the name of the website and the website's URL. See <a href="#">Domain settings</a>.</td>
</tr>
<tr>
<td>Edit Survey Settings</td>
<td>Set the roles, ratings, and response goals. See <a href="#">Survey display</a>.</td>
</tr>
</tbody>
</table>

### Review survey data and place the order

To review survey data, you will select a license name from the Trial Licenses list, and then open the Survey Data accordion. The Survey Data accordion summarizes any survey responses collected by the externally hosted surveys. If response goals are being used, the total of responses from each respondent role is summarized.

You can order the collection from the Survey Data accordion. Add the collection to either a new or an existing order. See [Add item to order](#) for instructions on adding the collection to an order. The cost data shown is for informational purposes only and can be edited in the History accordion.

#### View survey data

1. In the left navigation, under Licenses, select **Trial Licenses**.
2. Select a **license name** from the Trial License list.
3. Expand the **Survey Data** accordion.
4. Select a collection or provider from the Collection Surveyed drop-down list.
   - Optionally, enter the name of the collection or provider in the text box. Names that match what you enter will display below the text box. Select the collection or provider.
5. Select the **Survey Summary** or **Review** tab.

#### Survey Summary tab

<table>
<thead>
<tr>
<th>ELEMENT</th>
<th>ACTION/DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average Rating</td>
<td>The average rating of all respondents is shown as stars and the numeric value appears below the stars.</td>
</tr>
<tr>
<td>ELEMENT</td>
<td>ACTION/DESCRIPTION</td>
</tr>
<tr>
<td>---------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>See all reviews</td>
<td>See the <a href="https://help.oclc.org/Library_Management/WorldShare_License_Manager/Represent_your_eresources/Trial_licen...">Reviews tab</a>.</td>
</tr>
<tr>
<td>Bar graph of ratings</td>
<td>A bar graph shows the number of ratings per number of stars.</td>
</tr>
</tbody>
</table>
| Cost/Edit Cost                  | • Select **Edit Cost** to change the cost. This link opens the History accordion. You edit the cost in the History accordion. Remember to click **Save** after changing the amount.  
  • The cost of the collection is for informational purposes only.                                           |
| Table of response summaries     | • The top row of this table shows the total number of responses compared to the goal set and the average total rating.                                                                                               
  • The remaining rows display the average rating and the number of responses of each role.                  
  • A check mark icon in the Responses/Goals column means your response goal was met for that role or for the total.                                                     |
| Add to Order                    | Click **Add to Order** to add the collection to an existing or a new order. See [Add item to order](https://help.oclc.org/Library_Management/WorldShare_License_Manager/Represent_your_eresources/Trial_licen...) for instructions. |

**Reviews tab**

Select this tab to view a complete list of responses. The list displays the individual respondent's rating, role, date the survey was taken, and any comments. The Filter by drop-down list allows you to focus on a specific role or rating. Each row has a delete button to remove the individual line item from the list.

<table>
<thead>
<tr>
<th>FILTER BY</th>
<th>ACTION/DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Show All</td>
<td>Displays all individual ratings, roles, comments and date the survey was completed. Show all is the default setting.</td>
</tr>
</tbody>
</table>
## FILTER BY

<table>
<thead>
<tr>
<th>FILTER BY</th>
<th>ACTION/DESCRIPTION</th>
</tr>
</thead>
</table>
| Keyword in Comment Section | 1. Enter keyword(s) in the text box.  
2. Click Filter.  
Search results appear below. If no items match your keyword(s), you will see the message, "No results." |
| Rating                  | 1. Use the drop-down list to select the star rating you want to review.  
2. Click Filter.                                                              |
| Role                    | 1. Use the drop-down list to select the role you want to review.  
2. Click Filter.                                                              |
| Reset                   | The Reset link returns the Filter by drop-down to the default Show All.                                                                        |

### Add and customize supported languages

Configure the supported languages for your survey via the Languages Tab. The survey appears to your library’s users translated to the default language and gives an option to select another language if one or more are configured. The survey will continue to list all collections, collection links, and public notes associated with active trial licenses in the language in which they were initially recorded.

From the Languages tab:

1. Select the green plus button from the Actions column.  
   ◦ English appears by default.  
2. From the new Language Row, select the desired language.  
3. Input your localized and translated Roles and Ratings labels using the text fields in the respective columns.  
   ◦ Email notifications for your surveys will be delivered in the default language of the survey.  
5. Click Save.

**Recommended**: Copy the survey code and paste it into the web page domains registered once you have setup and saved the languages to be supported. To copy the survey code, select Copy Survey Code from the Trial License Actions drop-down list.
Note: The **Trial License Actions** drop-down will not be activated until the configured languages have been saved.