Altmetric Explorer:
a guide to onboarding

Altmetric

How we run onboarding at Altmetric

If you are reading this article, you are probably about to begin an Explorer implementation, and will have been sent our Implementation Guide as part of your welcome email from the Engagement Manager.

Your Engagement Manager will work with you closely throughout the project to make sure the implementation runs smoothly and you will always be able to reach the team with questions.

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Different types of implementation to suit you

During the sales process your Account Manager will have discussed with you the best way to integrate your data with the Altmetric Explorer from the following options:

- CRIS system such as Elements or Pure
- OAI-PMH feed from your Repository, such as DSpace
- CSV - this is a manual upload of your data into the Explorer via spreadsheet

In the welcome email from your Engagement Manager, we'll discuss potential times and dates for an implementation kick off call to discuss what we need from you from the start and how long the implementation will take. We'll also send over an Implementation Form, which collects key information we need for the integration - we appreciate it if you could complete this promptly. During the call we will be happy to go over anything from the Implementation Guide. The Engagement Manager will be your main point of contact throughout the process.
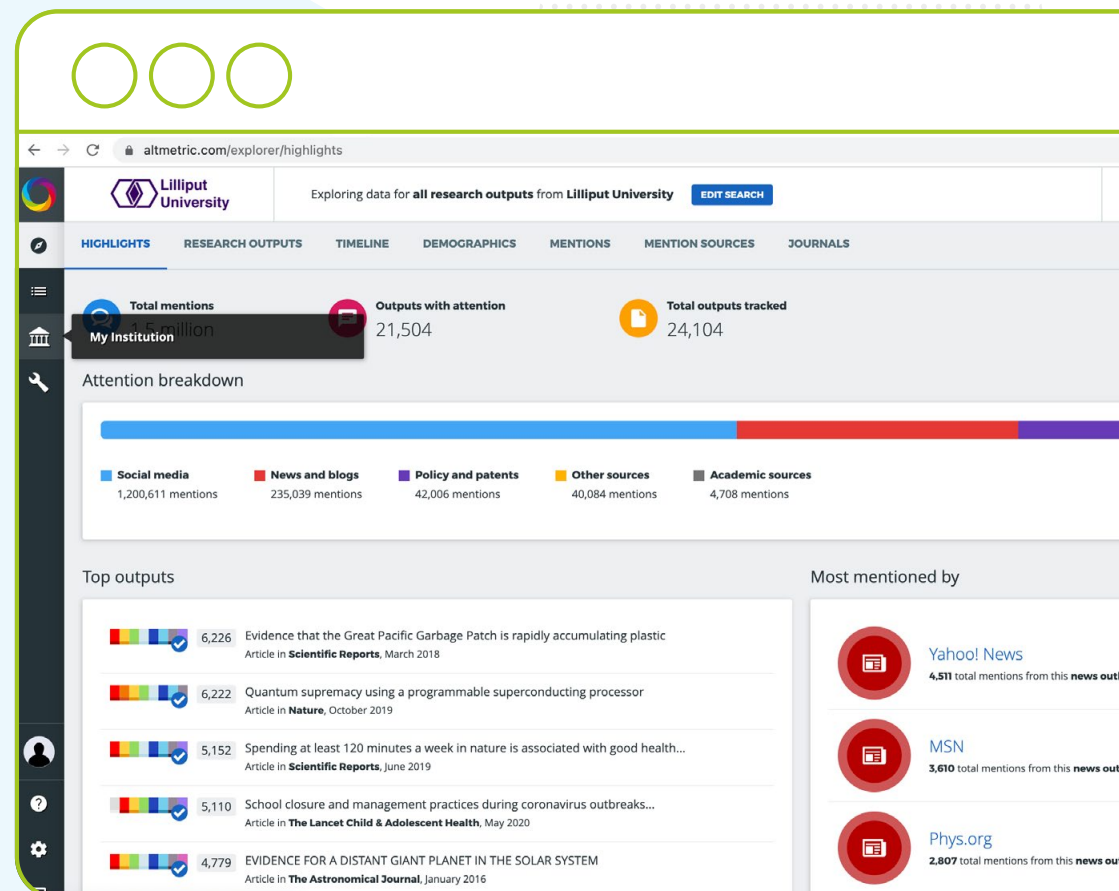
Key project roles

Making sure the right people have read through the Implementation Guide before the kick off call is essential to a successful implementation.

We recommend the following people are involved in the implementation:
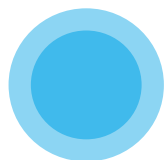
Party	Role	Role Description
Client	Project Manager	This will be the key contact for Altmetric during the implementation and roll out of your Altmetric products
Altmetric	Engagement Manager	This will be the person responsible for Altmetric onboarding, making sure the implementation is a success and hosting trainings and engagement
Client	Data Owner(s)	The person who owns/knows the data source(s) to be integrated with Altmetric Explorer
Client	Roll-out Coordinator	The person who has been designated to coordinate the launch and ensure end-user adoption
Altmetric	Technical Support Manager	The person who will handle any technical escalation to the Development Team as needed

Note: it is essential to involve representatives from teams across your organization, e.g. Research Office, Library, Comms/PR, if they are not facilitating this project from the start as they will be a key factor in the success of user buy-in to the Altmetric Explorer.

Step-by-step implementation process

CRIS System

With a CRIS implementation, once we have received your API endpoints, we hope to get the integration completed within the next five working days. Please make sure you have whitelisted our IPs which will be sent to you after the Implementation call.

The Engagement Manager will confirm with you during the kick-off call whether you would like Altmetric to test this on our Staging Platform, or are happy to go straight to the live instance. In most cases it will be the live instance, unless you are moving from a different implementation, and have a large number of users already registered.

OAI-PMH feed

With an OAI-PMH feed, we hope to complete the integration within five working days of the kick off call. If you have chosen to go with an OAI-PMH feed, we should already have conducted a data review of your repository feed. If you are unsure, please check with your Engagement Manager who will confirm the review has been completed or put you in touch with our Technical Product
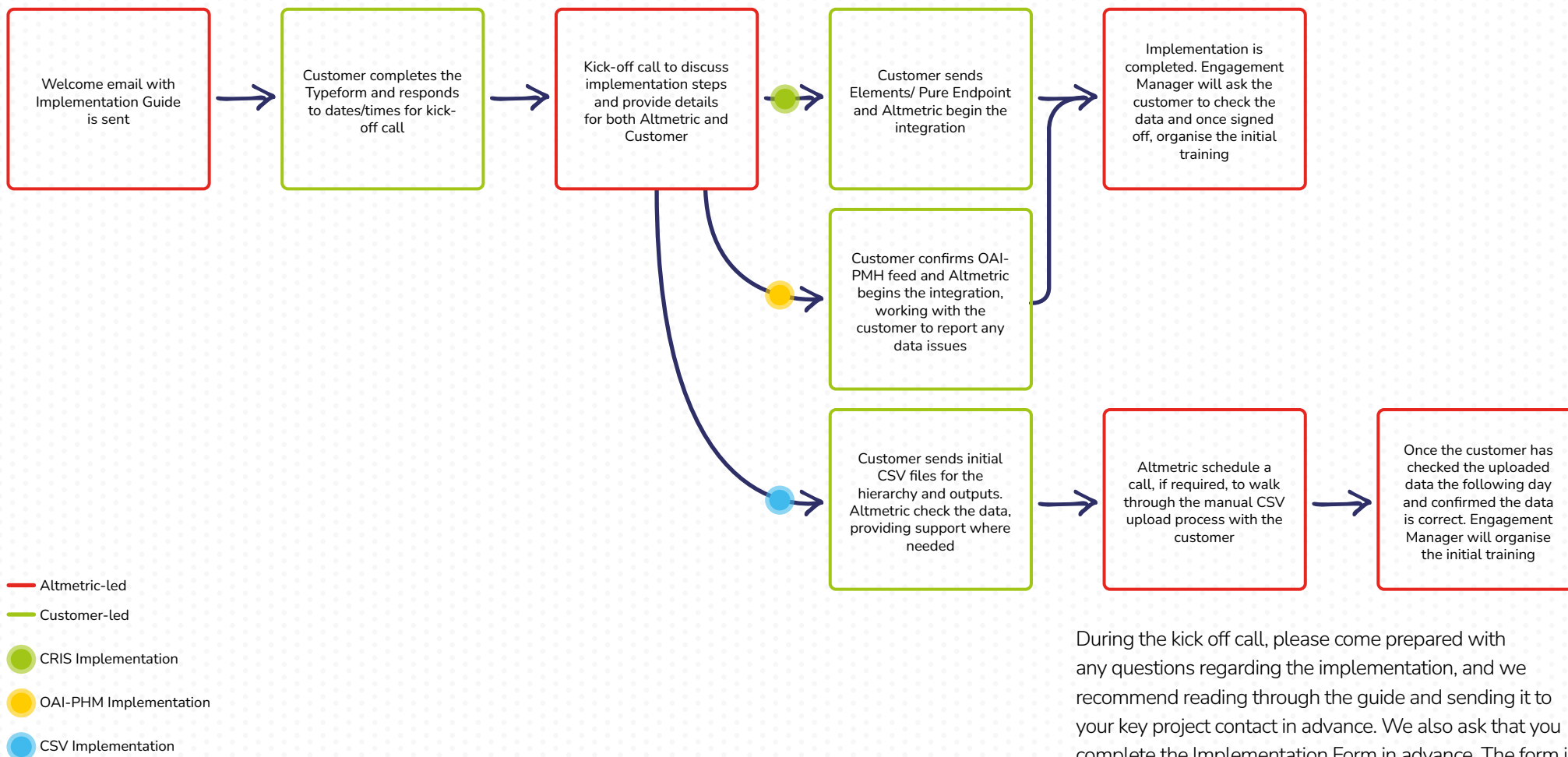
Support Manager. We will then run a review and get back to you with the results including any potential updates to the feed in order to import from the feed. You can also read more about OAI-PMH feeds **here**.

There can be delays if your OAI-PMH repository is not up to date or has issues that could not be detected in the initial data review. If this happens, the Engagement Manager or Technical Support Manager will be in touch with regular updates on what steps need to be completed to finish the integration.

CSV

With a CSV implementation, as soon as you have completed building the CSV files, the Engagement Manager will schedule a walkthrough call and this will show you the steps to upload the CSV files. The following day all data will be uploaded with the relevant Details Pages created for outputs we were not tracking previously.

The diagram below shows the key points for the implementation process depending on which route you have chosen.

Welcome email with Implementation Guide is sent

Customer completes the Typeform and responds to dates/times for kick-off call

Kick-off call to discuss implementation steps and provide details for both Altmetric and Customer

Customer sends Elements/ Pure Endpoint and Altmetric begin the integration

Implementation is completed. Engagement Manager will ask the customer to check the data and once signed off, organise the initial training

Customer confirms OAI-PMH feed and Altmetric begins the integration, working with the customer to report any data issues

Customer sends initial CSV files for the hierarchy and outputs. Altmetric check the data, providing support where needed

Altmetric schedule a call, if required, to walk through the manual CSV upload process with the customer

Once the customer has checked the uploaded data the following day and confirmed the data is correct. Engagement Manager will organise the initial training

Altmetric-led

Customer-led

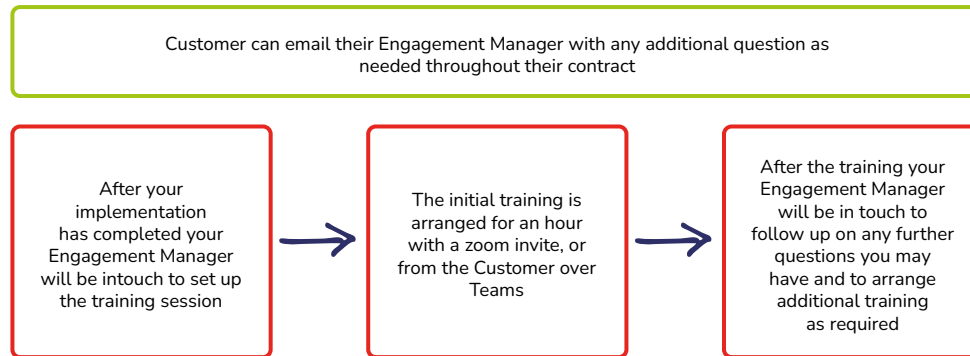CRIS Implementation

OAI-PHM Implementation

CSV Implementation

During the kick off call, please come prepared with any questions regarding the implementation, and we recommend reading through the guide and sending it to your key project contact in advance. We also ask that you complete the Implementation Form in advance. The form is there to give us more information about your organization that may not have been part of the contract.

Training

Once the integration has completed, your Engagement Manager will be in touch to arrange an initial training session. This will cover what all of the tabs mean within the Explorer, how to use the Advanced Search and access the Full Database, as well as saving searches and running reports.

For the initial training, it is best to include, but not limit to the following types of users: Librarians, Research Officers, other interested parties throughout your organization. The training can be recorded for your records, if given online.

Customer can email their Engagement Manager with any additional question as needed throughout their contract

After your implementation has completed your Engagement Manager will be intouch to set up the training session

The initial training is arranged for an hour with a zoom invite, or from the Customer over Teams

After the training your Engagement Manager will be in touch to follow up on any further questions you may have and to arrange additional training as required

— Altmetric-led
— Customer-led

Roll-out

After the initial training, speak to your Engagement Manager about how you want to roll out your Altmetric Explorer Instance and they will be able to help you with ideas, past experiences as well as offering more training to gain maximum traction within your organisation. They will also be happy to do separate training sessions with the comms/media teams who may not be aware of this resource, there are also options to work with us on workshops, specialized training and Q&A sessions.

As well as training, Altmetric also offers a wide range of resources that you can add to your websites, including materials from our Resource Library, blog posts, and free webinars/events throughout the year:

Your Engagement Manager will also reach out to you throughout your contract with updates on new features, answering any questions you may have. At Altmetric we are always interested to hear what our customers have to say, so please do reach out to us as well.

As well as your Engagement Manager, you also have access to our Support Team, who will be able to help answer questions, you can reach them at **support@altmetric.com** as well as reading articles on our **Knowledge Base**, where you can find our FAQs.

Resource Library $\longrightarrow$

Blog Posts $\longrightarrow$

Upcoming Events $\longrightarrow$

Past Events (Video on Demand) $\longrightarrow$

Altmetric Repository $\longrightarrow$

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