

Alma & Discovery Implementation Methodology



Executive Summary

This document outlines Clarivate's structured approach for implementing Alma and Discovery solutions. It details project phases, team roles, timelines, training, and best practices to ensure a successful and sustainable deployment for your library.

1. Our Implementation Methodology

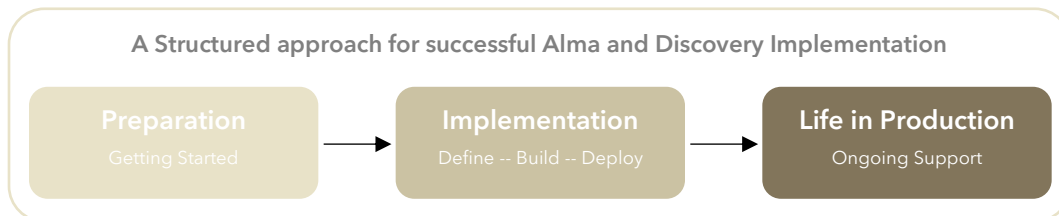
Clarivate's methodology is based on proven best practices and collaborative partnership. Our experienced project manager works closely with your team to ensure alignment on scope, roles, and timelines, allowing your staff to focus on institutional priorities while we manage technical execution.

Key Features:

- **A Defined Implementation Timeline:** 4-6 months for standard-sized institutions; 8+ months for complex implementations
- **Discovery Integration:** Seamless connection between Alma and your discovery platform (Primo or Summon)
- **Collaborative Partnership:** Regular checkpoints for accountability and quality

2. Project Phases

Our implementation methodology leverages best practices and years of professional experience to provide a structured, repeatable process that manages expectations and ensures success. The typical project implementation is structured into three clear phases, each with defined activities and deliverables.



2a. Getting Started: Project Preparation

Upon signing the contract, you receive a comprehensive preparation package containing implementation guides, recorded training sessions, and technical documentation for library and IT staff.

You will also be asked to fill in an onboarding questionnaire. Clarivate will conduct an internal review based on your answers, to ensure our implementation team understands your institutional goals, requirements, and project scope. During this preparation period, both teams identify stakeholders and form project teams. We recommend using this time to review your existing workflows and data.

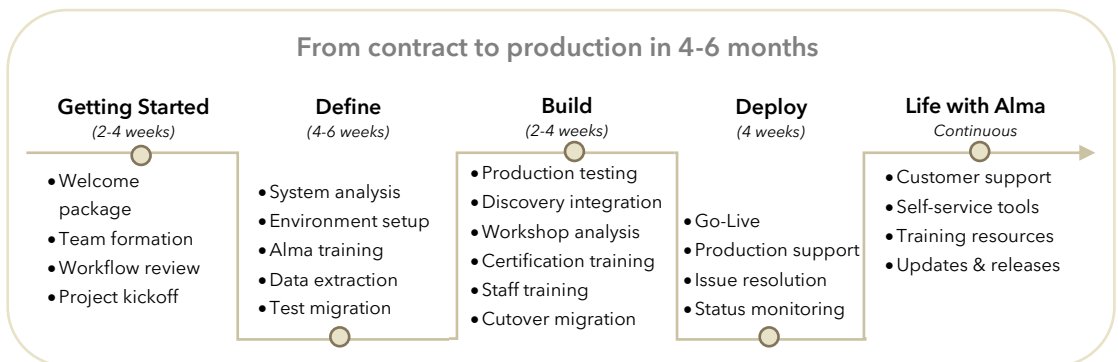
Your assigned Clarivate project manager then coordinates a kickoff meeting with your project lead to formally begin implementation.

Key Activities:

- Welcome package with guides and recorded sessions
- Internal review to understand your goals and requirements
- Stakeholder identification and project team formation
- Workflow and data review by your institution
- Project kick-off coordinated by your Clarivate project manager

2b. Implementation

Clarivate pairs our expert implementation team with your institutional project team throughout the process. Regular project status meetings ensure progress tracking and accuracy at every stage



Define Phase

The requirements gathering phase where we translate your institutional needs into technical specifications and system architecture. Your staff complete essential training and provide configuration and migration inputs, while the project team configures environments and execute initial data migration load for testing.

Kickoff & Planning

- Project manager establishes detailed project plan and milestones
- Teams agree on Go-Live date and implementation timeline

Environment & Training

- Clarivate provisions sandbox and production environments
- Your team completes Alma Essentials Training (eLearning videos) followed by Q&A sessions
- Sandbox access granted

Data & Configuration

- Customer extracts and validates data from source systems
- Customer provides configuration inputs
- Clarivate configures the production environment based on your requirements
- Test data migration performed

Build Phase

The Build phase involves testing configured systems with your data against real-world scenarios and institutional workflows. This includes comprehensive staff certification and integration testing to ensure operational readiness.

Testing & Integration

- Production environment access provided for functionality review
- Discovery interface (Primo/Summon) integrated and released for testing
- Functional calls between implementation teams

Workshop & Certification

- Workflow consultation and Certification training completed
- Third-party integrations identified and configured

Final Preparations for Go Live

- Internal staff training conducted
- Source systems frozen for cutover
- Final data migration performed

Deploy Phase

The production launch period with dedicated implementation support to ensure seamless transition to live operations. Focus shifts to performance monitoring, issue resolution, and operational stability.

Go-Live & Support

- Go Live - Production launch with dedicated implementation team support
- Regular status calls to address any issues
- Transition to Clarivate Customer Care team
- Project completion

2c. Life with Alma

Your relationship with Clarivate extends well beyond Go-Live. We are committed to ensuring your continued success with Alma and Discovery solutions.

Our dedicated Customer Support team provides comprehensive assistance for technical issues and system optimization. This includes robust self-service resources and direct support through our case management system, accessible via the Clarivate customer portal.

Your investment is protected through ongoing training resources, system updates, and strategic guidance to support your institution's evolving needs.

3. Roles and Responsibilities

A successful Alma and Primo/Summon implementation rely on close collaboration between Clarivate and your library's project team. Below is a summary of each team's core roles and responsibilities.

Project Team Overview

Team	Primary Role	Key Responsibilities
Clarivate	Guide and support successful implementation	Project management, configuration, data migration, training, and technical support
Customer	Lead local adoption and internal coordination	Project oversight, data preparation, functional review, training, and technical integration

Clarivate Project Roles

Role	Key Responsibilities
Project Manager	Oversee project plan, schedule, risks, and communication; coordinate all activities
Implementation Consultant	Analyze requirements, apply configuration, provide implementation support, consult on workflows and training
Data Migration Consultant	Manage data migration from legacy systems

Customer Project Roles

Role	Key Responsibilities
Project Lead	Manage internal team, coordinate with Clarivate, track progress, escalate issues, report status
Functional Experts	Advise on business processes, conduct functional reviews, participate in testing and training
Training Coordinator	Train library staff, adapt training materials, support ongoing learning
Technical/Integration Lead	Provide technical expertise, support integrations (e.g., authentication), assist with testing
System Administrator	Gain system proficiency, manage day-to-day operations, open support cases post-launch

4. Customer Education

Training is strategically embedded across every phase of the implementation lifecycle and continues well beyond Go-Live. This ensures your team builds and sustains the expertise needed for long-term success and system optimization. Clarivate provides comprehensive training and targeted workflow consulting to your core project team over the course of the project.

Learning Resources

- **Self-Paced Training Modules:** micro-tutorials and user guides available anytime via the [Customer Knowledge Center](#)
- **In-Product Help & Documentation:** Extensive, searchable product documentation accessible both on the Knowledge Center and directly within the application
- **LibGuides:** Curated resource guides for all major Clarivate products, supporting both new and advanced users
- **Product Administration Certification:** Formal certification programs for [Alma](#) and [Primo](#) offered through the [Clarivate Software Academy](#), ensuring your administrators achieve and maintain expert-level proficiency

Ongoing Education

- **Release Webinars & Highlight Videos:** Timely updates on new features and enhancements, helping your team stay current
- **Live Webinars:** Complimentary, instructor-led sessions covering essential topics and best practices
- **Premium Workshops:** Intensive, small group workshops offering hands-on experience and deeper dives into advanced functionality

This structured approach ensures your staff maintain expertise and can leverage new features as your system evolves.

5. Implementation Best Practices

A successful Alma and Primo/Summon implementation requires careful planning, strong leadership, and active engagement from both technical and public services staff. Drawing on extensive experience across a range of library environments, Clarivate recommends the following best practices to ensure a smooth transition and long-term success:

Staffing	Data	Execution
<ul style="list-style-type: none">• Assemble project team early• Attend training at implementation start• Practice in sandbox environment• Build internal expertise• Maintain realistic timelines	<ul style="list-style-type: none">• Clean up data before migration• Understand required data formats• Review data exports thoroughly• Validate data integrity	<ul style="list-style-type: none">• Ensure executive sponsorship• Involve IT and public services staff• Prioritize implementation activities• Monitor progress regularly• Promote system adoption

Glossary

Sandbox: A test environment for training purposes. Standard sandboxes are pre-loaded with generic data, configuration and sample user roles with varying levels of permissions

Cutover: The planned period during which your institution switches over from your legacy system to Alma and Discovery, including the final data migration and configuration freeze.

Go-Live: The official start date when Alma and Discovery become your library's operational systems for staff and users

Discovery Layer: The patron interface (e.g., Primo or Summon) that provides unified search and access to your library's resources.

Appendix: Sample Project Timeline

The typical implementation follows a structured timeline across three phases: **Define** (Month 1-2) establishes project foundation through kickoff, training, and environment setup; **Implementation** (Month 2-4) focuses on production testing, integration, and staff certification; and **Deploy** (Month 5) culminates in Go-Live with dedicated support transition.

This phased approach ensures thorough preparation and validation while maintaining predictable milestones for resource planning and stakeholder coordination.

Phase	Activity	Month 1	Month 2	Month 3	Month 4	Month 5
Define	Kick-off meeting	◆				
	System Analysis	●				
	Data extracts from source systems	●				
	Environment provisioning	●				
	Access to the sandbox	◆				
	Basic training	●	●			
	Finalize migration and configuration decisions	●	●			
	Data and configuration loaded into production		●	●		
Build	Access to the production environment			◆		
	Discovery and Delivery integration			●	●	
	Authentication and 3 rd party integrations			●	●	
	Workflow consulting, configuration, and data review			●	●	
	Product certification training				●	◆
	Staff training				●	●
	Cutover					●
Deploy	Go Live					◆
	Project wrap-up and closure					●
	Switch to Support					◆
	Post Go-Live consultancy					●

Legend:

- = Activity/Task
- ◆ = Milestone/Key event

About Clarivate

Clarivate is a leading global provider of transformative intelligence. We offer enriched data, insights & analytics, workflow solutions and expert services in the areas of Academia & Government, Intellectual Property and Life Sciences & Healthcare. For more information, please visit clarivate.com.

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