Release Overview

As announced in our blog post, we’re releasing a series of updates to the InCites experience to make the platform more intuitive, inviting, and valuable to you and your organization. Each of these updates were informed by InCites users, through surveys, conversations, and prototype-testing over the past year. Thank you to all who shared feedback!

You probably have an InCites workflow you’re accustomed to—so throughout the new experience, you’ll see highlights pointing out what’s changed.

If you have any questions, please contact: Rohit Kulkarni, Product Manager, InCites, Rohit.Kulkarni@Clarivate.com

Supported Browsers

Most current browsers will work with InCites. For best performance, we recommend the latest versions of:

- Chrome
- Firefox
- Edge
- Internet Explorer 11

We strongly recommend moving away from IE11. Microsoft too recommends using the new Microsoft Edge as your default browser.

A New Experience for InCites

If you’re a longtime InCites user, the new homepage can help you quickly dive into key tasks and revisit past work. If you’re new to InCites or introducing a colleague to the platform, the new homepage provides clear entry points and a sense of what to expect.
Global Header and Navigation

The Global header continues to be divided into four sections as before and reflects the three boxes from the homepage.

Analyze: Access the six entity types from this dropdown

Report: Updated with the two Overview Reports (Three, if you are My Organization subscriber)

Organize: Quickly jump into your Folders or Dashboard Analysis. “My Folders” is now “Folders” and is the place where is where you can organize and revisit your saved analyses (Dashboard), custom reports, and custom datasets.

Old experience

Global header:

Analysis ▼ Reports ▼ My Folders My Organization

New experience

Global header:

Analyze ▼ Report ▼ Organize ▼ My Organization

Homepage View

The new homepage features ways to quickly dive into key tasks and revisit past work. It also includes a feed of InCites updates via Resource Center (The ? at bottom right of each page).

Old experience

Homepage:
New experience

Homepage:

Quick access remains available – in the same location – for expert users who know precisely where they want to go.

Analyze access the ready-to-use starter analyses.

New landing page quickly start analyses, access reports, or organize your projects.

Report create new reports, access system reports.

Organize manage your dashboards, reports, and datasets.

Help and guidance is now available throughout. The resource center is available on every page.
Navigation in New Homepage View

Each box in the home page will take you to the corresponding landing pages.

Start an Analysis

There is a new “Start an Analysis” page that is like the old experience for the homepage, but with more context about each option for starting an analysis. You can start an analysis by choosing an entity type (formerly explorers or master tiles), use a starter analysis based on popular use cases, or revisit a saved analysis. The Starter Analysis acts as a guide/walkthrough on the most frequently used use cases.

<table>
<thead>
<tr>
<th>Old experience</th>
</tr>
</thead>
<tbody>
<tr>
<td>N/A</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>New experience</th>
</tr>
</thead>
<tbody>
<tr>
<td>New “Start an analysis” page:</td>
</tr>
</tbody>
</table>
Explore Reports
There is a new section called “Reports,” where you can view an Overview Report (formerly called “System Reports”), create your own report, or jump to Folders to revisit recent reports.

Old experience

N/A

New experience

New “Report Landing” page:
Organize your Projects

The new Folders page is like the layout of My Folders but with a refreshed look that is more like modern file-sharing interfaces. The new Folders area is a place where you can revisit your custom reports and custom datasets and organize them into folders.

Old experience

My Folders:

New experience

Folders page:
You can reach the Folders page using the Organize header as well.

InCites

Resource Center
The continuous help available in the Resource Center helps you quickly get up to speed by accessing tips, updates and training guides from every page and on-board users faster and efficiently.
Start an Analysis

A new experience for analyzing data
Still the best data, now with the experience to match.

Clear and simple workflows
Adjustments to layout and hierarchy make it easier to move through the typical steps of an analysis—for example, the data table is the primary view, and you can show the visualization only when you’re ready.

Context and confidence
Definitions and tips about filters and indicators give context so you can be confident about your slicing and dicing of the data.

Layout change: You’ll see just the table when you start, then you can switch to the visual when you’re ready.

Old vs New experience: Main view of an analysis:
**New features:** We got a bunch of additional new features and enhancements to help users with their analysis.

- **Focus**
  - Quickly analyze a selected entity and re-focus.

- **Applied filters**
  - Never lose track of an analysis.

- **Analysis tools**
  - Filters, indicators, baselines — all in one location.

- **'Sticky' options**
  - Your settings are retained.

- **Convenience**
  - Quick-to-use common analysis settings.

- **Analysis options**
  - Select from the full list and easily see which are applied.

- **Visualizations**
  - Clear visual key; select indicators and add baselines easily.

- **Tabbed display**
  - Make better use of your display by toggling between table and visual.

- **Analysis**
  - Filters, indicators, baselines brought together into one convenient location.

- **Layout**
  - Better use of screen space to maximize your analysis.

- **Filters**
  - Never lose track of applied filters.

**Analysis Header**

**Layout change:** The option to filter by entity and entity name, a common first step, is now at the top.
Old experience

Entity type and name search as part of filter sidebar:

New experience

Entity type and name search as part of new top search bar:
Applied Filters

**New layout:** Easily keep track of applied filters

**Old experience**

*Applied filters visible only on tooltip:*
New experience

*Applied filters easily available below the header:*

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**Filters, Indicators and Baselines**

**New layout:** We’ve grouped together related content in the filters, indicators, and baselines sidebars to draw clear relationships between options and make it easy to browse and find the right option.

Thresholds are integrated with filters.
Contextual Help

**New feature:** You’ll see help text when and where you need it, primarily in the sidebars for adding indicators, and baselines. Definitions and tips give context so you can be confident about your slicing and dicing of the data.
Time Period

**New feature:** Different Time Period options available to pick the one that suits you the best

**Old experience**

*Single time period option:*

<table>
<thead>
<tr>
<th>Time Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>Min: 1980</td>
</tr>
<tr>
<td>Max: 2020</td>
</tr>
</tbody>
</table>

**New experience**

*Multiple time period options to apply. You can also choose the Custom year range to pick a start and end year in your analysis as before.*

Dataset

Include ESCI documents

Publication Date

- Last 5 complete years (2015-2019)
- Last 5 complete years (2015-2019)
- All years (1980-2020)
- Year to date (2020)
- Custom year range

Organization Type

Web of Science extraction dates and InCites data refresh dates are visible together with the time period filter

**Publication Date**

Last 5 complete years (2015-2019)

Data table vs Visualization

**New layout:** The data table and visualization is now in tabbed view allowing users to focus more on the data. User can apply filters, add indicators, pin or exclude items as before. The “Search” functionality is now renamed to “Find in table”. Data and trend exports continues to be supported in the new format.

**Old experience**

_Data table and Visualization displayed together forcing users to “hide” the visualization in order to focus on the data table_

![Old Experience](image1.png)

**New experience**

_Data table and Visualization are tabbed, so users can review the data, apply the filters and when ready, plot the data into a visualization:_

![New Experience](image2.png)
Column Headers

New feature: Use the dropdown on a column header to see more options.

Old experience

No Column headers:

New experience

Column header dropdown:

Release Notes | InCites Benchmarking and Analytics IC3.0
Add an Indicator

**New feature:** To add an indicator, instead of a difficult-to-find gear icon, you can use the indicator sidebar, which provides more context, or the “Add indicator” button above the data table, which is more of a quick-add option.
Document List Window
The document list window is adapted to the new layout

Old experience

The Document list window and View in Web of Science:

New experience
The Document list window and View in Web of Science:
Descriptive Refocus

The refocus is now moved to the document list view

**Old experience**

*Refocus integrated with the data table:*

<table>
<thead>
<tr>
<th>Name</th>
<th>Rank</th>
<th>Web of Science Documents</th>
</tr>
</thead>
<tbody>
<tr>
<td>University of California System</td>
<td>1</td>
<td>1,526,203</td>
</tr>
<tr>
<td>Centre National de la Recherche Scientifique (CNRS)</td>
<td>2</td>
<td>944,611</td>
</tr>
</tbody>
</table>

**New experience**

*Refocus moved into document list window so users can analyze the documents first and then move to a different entity:*
Visualization

We have made it easy for you to focus on the data table, building a query and running your analysis first before plotting the data in the visualization.

Old experience

Visualization displayed on top of the data table with each type listed in the dropdown:
Visualizations moved to its own tab with a little preview of each visualization type. Quickly customize any visualization by adding baselines to the data or add the visualization to your custom report.

Explore Reports

Overview Reports

Earlier this year, we consolidated tiles from existing Seven System Reports (Five for non-My Organization subscriber) into three “Overview” Reports (Two for non-My Organization subscriber).
With this release, transition to the Overview Reports is complete.
Overview reports are designed to include more structure and context for data by way of report tabs and filtering, which allow users to customize the fundamental parameters of the report: time-period and dataset. These design improvements make the Overview Report a more customizable and relatable component of the application.

Filters

Report filters cascade to all analyses within a report and provide users with the ability to customize their report based on fundamental and key aspects of research data.

Report Tabs

The tiles in each Overview Report is organized into tabs and section indicate the category or topic of the analyses within it. They now communicate an effective content hierarchy making it easier to navigate and comprehend data within the report.

Where is Local Journal Utilization Report?

The Local Journal Utilization Report (LJUR) is now part of the Organization Report, giving you a more comprehensive view of the analyzed institution. The six tiles from existing LJUR and migrated over to the “Journal Utilization” tab within the Organization Report.
Note: Like LJUR, data in tiles under Citing Journals and Cited Journals sections is limited to 2006 start year only.

Where are the tiles from existing System Reports?

Majority of the tiles from existing System Reports are moved over to the three Overview Reports. A mapping file is created for your convenience and is available in help.

**Organize Your Projects**

**Dashboard View**

“Dashboard” is now available under the “Organize” header menu item and is adapted to the new UI.
Old experience: Dashboard

New experience: Dashboard

Next Steps
As we continue iterating through the new experience, we would love to hear your feedback and make appropriate changes whenever necessary. If you have any questions or comments, please reach out to our customer care team.

All of our training resources are now in one place: User can view on-demand videos, “how-to” guides and live training sessions accessible from one, centralized place.

Please join our InCites google group to connect with other InCites users to share use cases and recommendations.