

 **Clarivate™****InCites**

My Organization Admin Guide

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Introduction

As an administrator at an institution subscribing to the InCites My Organization module, use this guide to:

- understand the login process
- understand the module's functionality
- understand how to input and output file content

Our entitlements team must entitle admin users for administrator access to My Organization. [Contact us](#) if you have questions about this user guide, or questions related to the matching and tagging process.

Designating Admin Users

Your institution needs to designate at least one person as an admin user. Admin users can upload new data, which overrides existing data in the system. When your institution contacts our support team to tell us who your admin users are, we add entitlements to those user accounts and send an email confirmation. There can be more than one admin user at the institution.

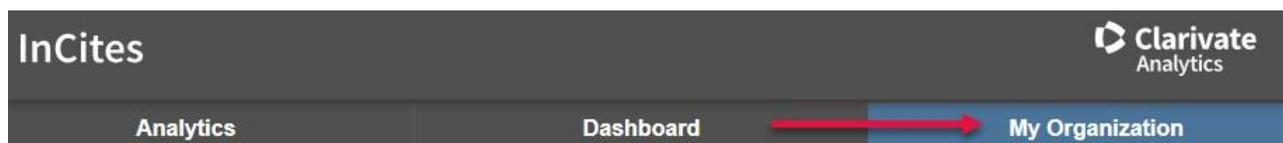
Accessing the My Organization Module

My Organization is only available from the InCites platform. You don't need a separate username or password, because admin user accounts are entitled to access the module. To open the My Organization:

1. Open an internet browser to <https://incites.clarivate.com/#/analytics>.
2. Sign in with your email address and password, or by using your institution's single sign-on (SSO).

The site is optimized for Internet Explorer, Firefox, or Google Chrome browsers on a desktop or laptop computer; it is not optimized for mobile access. We advise using one of these browsers, because we cannot guarantee other browsers will work with our product.

3. Click **My Organization** (tab) to open the module.



Notice, your organization's aggregated information appears in the **Organization Metrics** box.

Test univ
View and update your organization information.

Organizational Metrics

DOCUMENTS	DEPARTMENTS
0	11
FACULTY	
1	

Last updated: TODAY | 2:37 PM by Rohit, Kulkarni

Organizational departments and faculty Upload Export

ORGANIZATIONAL HIERARCHY	DEPARTMENTS	FACULTY	DOCUMENTS
+ Faculty of Humanities and...	1	0	0
+ Unaffiliated Researchers	-	1	-

Downloading Templates

1. To download templates click **Upload** from the **My Organization** tab:

My Organization

Upload Export

DEPARTMENTS	FACULTY	DOCUMENTS
1	0	0
-	1	-

2. Select the desired templates and click **Download template(s)**:

Upload files

Use our file upload form to add or replace your organization's hierarchy, researchers and their documents.

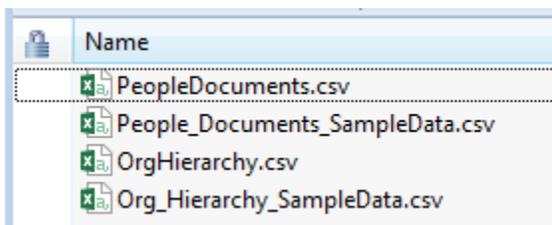
1 Download our templates

Select a template to download. This template will ensure that your data matches our system.

- Organizational hierarchy
- Researchers and documents



If you select **Organization hierarchy** and **Researchers and documents**, you will see a prompt to download a ZIP file. The ZIP file contains the templates and sample files with data that you can use for your reference. If you only choose one, you are prompted to download a CSV file.



File Types

- You need two types of files to upload data to My Organization: *orghierarchy.csv* and *people- document.csv*.
- My Organization only supports CSV files with encoding set to either *ANSI* or *UTF-8 without BOM*.
- The first row of your input files must contain the exact same text that appears in the first row of each template. To avoid any issues, we recommend copying the first row from the template(s) and pasting it directly into the first row of your input file.
- **Required fields** for each input file must contain values. If they're empty, the system will not process the file(s).

Orghierarchy CSV

This file captures the organizational structure (units and subunits) of your institution.

OrganizationID	OrganizationName	ParentOrgaID
101	Department of Design	201
100	School of Arts	200

Col	Field Label	Data Type	Notes
1	OrganizationID*	String	Unique organization ID from your internal systems. We support combination of letters, alphabets and hyphens.
2	OrganizationName*	String	Name of the organization (commas are allowed if the name is enclosed in double quotes – e.g., "Department of Physics, Chemistry and Biology")
3	ParentOrgaID**	String	Links the organization to the parent

*Required field

**Optional for only the root organization

Pepledocuments CSV

This file captures information about people, their links to the corresponding internal institutions, and their publications.

PersonID	FirstName	LastName	OrganizationID	DocumentID	AuthorID	EmailAddress	OtherNames	FormerInstitution
121	Mark	Smith	100	WOS:000388123500004				
122	Dwayne	Ricardo	101	WOS:000388123500055				

Col	Field Label	Data Type	Notes
1.	PersonID*	String	Unique person ID from your internal systems. We support combination of letters, alphabets and hyphens.
2.	FirstName*	String	First name of the person
3.	LastName*	String	Last name of the person
4.	OrganizationID	String	Unique organization ID affiliated with the person. If empty, we will link the corresponding person to root organization.
5.	DocumentID	String	Examples:

			Web of Science Core Collection Accession Number: WOS:000388713500004 MEDLINE ID (PubMed ID): MEDLINE:24843332 DOI: 10.1088/1478-3975/13/6/066006
6.	AuthorID**	Numeric	ORCID, Researcher ID or any other external ID
7.	EmailAddress**	String	Email address of the person
8.	OtherNames**	String	Other names used by the person
9.	FormerInstitution**	String	ID of other internal departments of which this person was a member

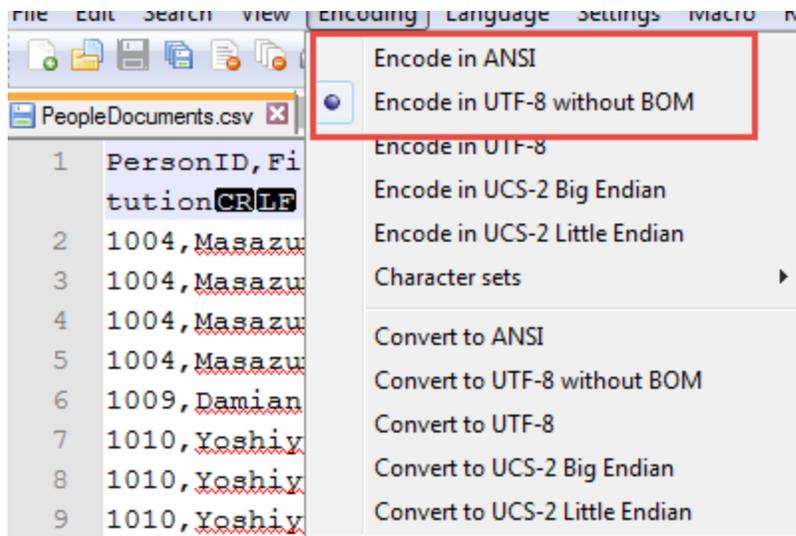
*Required field

**Not processed - the module will not import nor display data in these fields; they're only references.

File Requirements

Each file must follow these requirements:

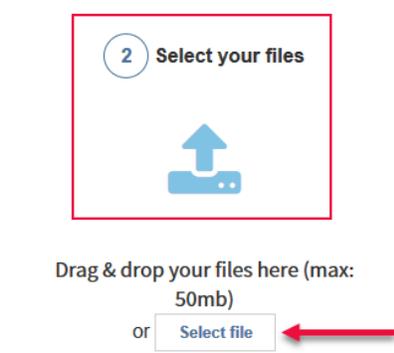
- You must encode the file in ANSI or UTF--8 without BOM format.
- The headings in the first row of both the files must be the same as the templates.
- To ensure the correct file format with appropriate headings, use the input file templates available for download from your upload page.
- Only one unique article per row for Peopledocument.csv.
- All required fields must contain text, or the file will fail validation. If the required field does not apply, put a space or period in the cell, or type *NA*.
- The system requires a comma delimited file (CSV) with the extension *.csv with either ANSI or UTF-8 without BOM encoding. We strongly recommend using [Notepad++](#) or a similar text editor.



Uploading Files

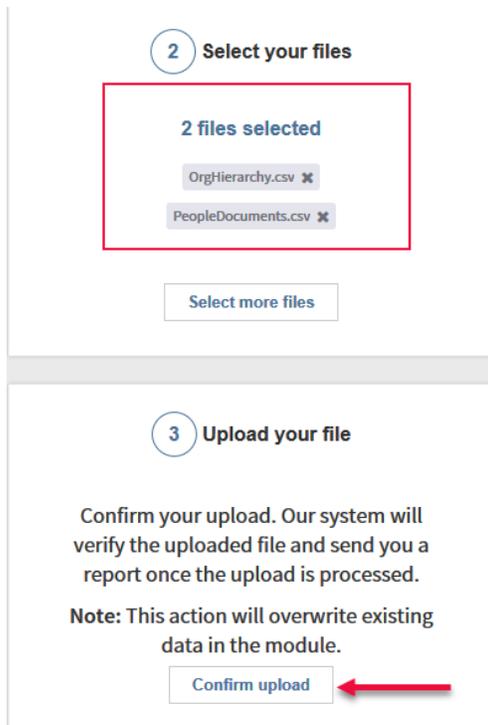
Selecting Files to Upload

After you create your files and save them (peopledocument.csv and orghierarchy.csv) to your computer, click **Select files** from the **Upload Files** window. Alternatively, you can drag and drop your files into the **Select your files** box.

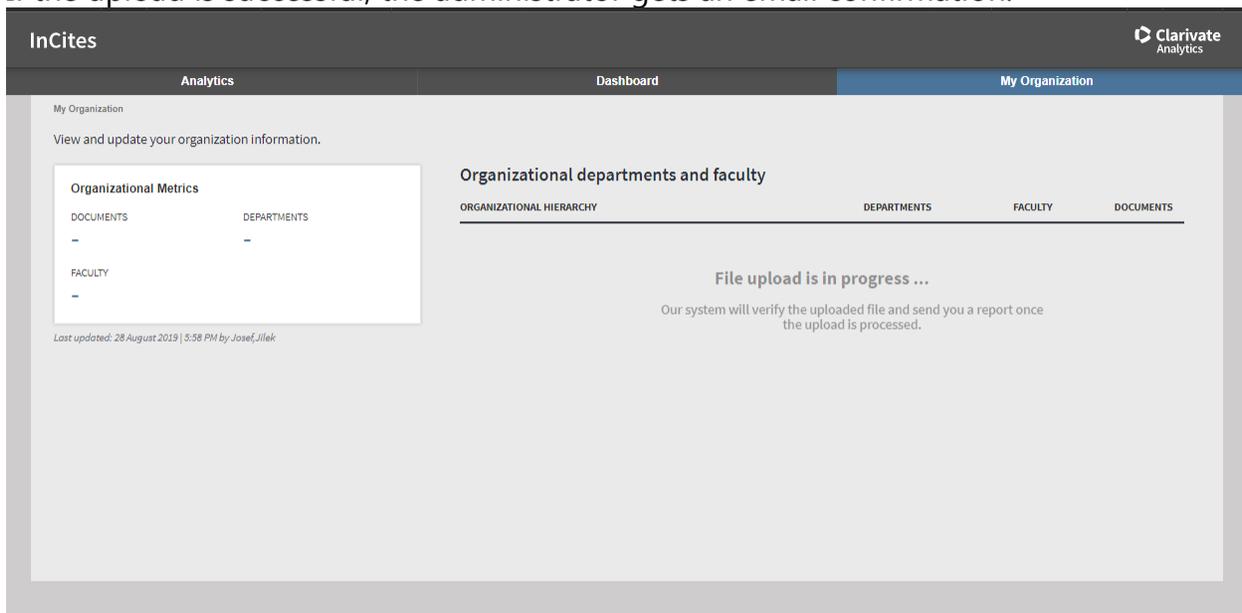


Confirming Your Files for Upload

1. Click **Confirm upload** in the **Upload your file (3)** box:



If the upload is successful, the administrator gets an email confirmation.



2. Under **File Upload Status**, you can see if the files successfully uploaded or if there were errors:

File Upload status

ADD RESEARCHERS AND DOCUMENTS: ERROR: 0/1 MATCHED

PeopleDocuments.csv
File size: 0.17 KB

Phase	Status	Timestamp
Upload	Complete	TODAY 2:37 PM
Matched	0	TODAY 2:37 PM
Non-match	1	TODAY 2:37 PM

ADD ORGANIZATION HIERARCHY: SUCCESSFUL

Sample_Org_data_prod_LevelTest.csv
File size: 0.63 KB

Phase	Status	Timestamp
Upload	Complete	TODAY 9:18 AM

The upload may be unsuccessful for one of two reasons:

- The upload could not start due to a mistake in the dataset, in which case, the user is notified.

Upload files
Use our file upload form to add or replace your organization's hierarchy, researchers and their documents.

1 Download our templates

Select a template to download. This template will ensure that your data matches our system.

Organizational hierarchy
 Researchers and documents

Download template(s)

2 Select your files

Drag & drop your files here (max: 50mb)
or

3 Upload your file

[Org Hierarchy/People and Documents] file does not have expected column headers

Confirm upload

- [The upload crashes, in which case, the organization structure page refreshes and nothing happens.](#)

Email Confirmation

After your files are uploaded and processed, you will receive an email to let you know the system started the matching process. The matching process looks up the Web of Science Accession Number, Medline, and DOI IDs from the PeopleDocument.csv file in the InCites dataset and returns the corresponding results.

You can view the status of matching process from the Upload Files screen.

An email with a success or fail message is sent to you when the system completes the process. Common errors that cause the process to fail are:

- Duplicate Org Unit(s) found
- Multiple Org Unit(s) found as root Org Units
- Org Unit(s) found with null columns
- Missing data a required field
- Person ID/Organization ID supports only letters, numbers and hyphens.

Wherever possible, the email notification will tell you the exact row number and data that caused the error.

If the upload is successful, the email notification will provide details on the match rate.

Review successfully imported files from the Upload Files screen.

Upload status

ADD RESEARCHERS AND DOCUMENTS: **SUCCESSFUL**, 58/58 MATCHED

DataSet012_Apr2017.csv
File size: 534.7 KB

Phase	Status	Timestamp
Upload	Complete	28 March 2017 9:32 AM
Matched	58	29 March 2017 10:02 AM
Non-match	-	-

ADD ORGANIZATION HIERARCHY: **SUCCESSFUL**

Org Hierarchy November 2017.csv
File size: 534.7 KB

Phase	Status	Timestamp
Upload	Complete	28 March 2017 9:32 AM

You can click the file name to download the data and view the document-level status of the matching process.

Verifying the Organization Structure

After the My Organization module successfully processes your data, the landing page displays your institution's organizational structure and document metrics. If you wish to make changes to the data, click **Upload** to repeat the process. However, be aware that:

- repeating the process overwrites existing data
- you must upload PeopleDocuments.csv when you upload OrgHierarchy.csv

Oxford Brookes University
See, add and update your institute information.

Use the upload button to change the data

Institute Metrics

DOCUMENTS	GROUPS
5,376	104
RESEARCHERS	
973	

Organizational subunits and faculty

ORGANIZATIONAL SUBUNITS

	GROUPS	RESEARCHERS
+ Faculty of Humanities and Social Sciences	12	239
+ Faculty of Health and Life Sciences	9	89
+ Faculty of Business	12	217
- Faculty of Technology - Design and Environment	23	205
+ School of Architecture	3	32
+ Faculty of Technology - Design & Environment Support Services	3	21
- School of Arts	-	7
<input type="radio"/> Parsons, Lotie	-	-
<input type="radio"/> Soto, Vincent	-	-

Upload Export

My Organization API

After your files are uploaded and processed, you can keep the My Organization dataset current by sending delta updates through the My Organization API.

Myorg API Setup Process

#	Process Description	Person or Team
1.	Identify one or two MyOrg API admins at each subscribing client.	Institution Subscribing to My Organization
2.	Create an account on the API Developer Portal (https://developer.clarivate.com). If an account already exists, use the log-in feature to access your account.	MyOrg API Admin
3.	Once registered and logged in, create a new application (App) for the MyOrg API. In the Application Description field, mention the API use case is for MyOrg.	MyOrg API Admin
4.	Send an email to InCites_APIrequests@clarivate.com . In the email, include the API Developer Portal account information (Name, Email address, Application name and your Institution name).	MyOrg API Admin
5.	Find the account in the API Developer Portal and add the user to the MyOrg API subscription group.	MyOrg Product Team
6.	Send an email back to the client requesting they subscribe to the MyOrg API on Developer Portal from their MyOrg App (created in step 3 above). The API will now be visible to the client so they can request a subscription to the API.	MyOrg Product Team
7.	Complete the subscription form.	Client
8.	Once the subscription has been completed successfully by the client, the MyOrg Product team will receive an automated alert and approve the subscription, which will generate the API token; complete any necessary custom header modifications within the API Developer Portal.	MyOrg Product Team

9.	Email the client to tell them the subscription is approved. The client can get their API token by logging into their account and navigating to their MyOrg API app.	MyOrg Product Team
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MyOrg API Frequently Asked Question (FAQs)

1. Is there a fee to use the My Organization API?

The My Organization API is an open API and is useful to those who subscribe to the My Organization module on the InCites Benchmarking and Analytics platform.

2. What can I do with the My Organization API?

The My Organization API is designed for developers. As a developer, you can use it to create, edit, and delete fields within the My Organization dataset when an institution subscribes to the My Organization Module of InCites Benchmarking and Analytics.

3. What data fields can I edit using the My Organization API?

API users can add (POST), update (PUT), and delete organizations, people, and people information. You can also delete entire datasets.

4. What is the workflow for accessing and using the My Organization API?

As a developer, if you want to use the API, you must be entitled as a My Organization Administrator and request an API key through the Clarivate Analytics Developer Portal (<https://developer.clarivate.com/>).

5. Are there Converis specific integrations?

Starting with 6.5 release, Converis pushes your organizational data from Converis to My Organization, ensuring that My Organization has validated and up-to-date data, thereby avoiding data duplication and potential deviation. The integration requires a subscription for My Organization that must be activated in Converis. It only requires a few of the core standard attributes to function which are partially populated by the HR integration and other core functionality of Converis.

6. Are there VIVO specific integrations?

The Clarivate Analytics VIVO Service Provider Team engineered a Python code that automatically pulls data from VIVO and sends it to My Organization through the My Organization API. You can configure the script to execute on a routine schedule, consistent with the client's needs. Please see [this](#) GIT project for more information.

7. Can I use the My Organization API if I don't subscribe to Converis or VIVO?

Absolutely. My Organization is an open API and you can connect any system that you may have with My Organization through the My Organization API.

8. Where can I find documentation for My Organization API?

Documentation for the API is under continual development, as the product continues to gain more functionality. You can find the most up-to-date information on the My Organization API from our [developer](#) site.

9. Does the My Organization API offer read capability?

My Organization API does not offer read capability to populate other systems. Please contact your account manager or solutions specialist to request this enhancement.

Appendix

Swagger Documentation

API for institutional homegrown systems to create/update/delete their CRIS data into My Organization

Version Information

Version : 1.0.0

URI Scheme

Host : api.clarivate.com

BasePath : /api/myorg

Schemes : HTTPS

Tags

- Add a new Publication to an existing Person-Organization association : .
- Add an Organization/Department : .
- Add an existing Publication to an existing Person-Organization association : .
- Add an existing person to an existing Organization/Department : .
- Add and Associate a new person to an existing Organization/Department : .
- Delete a Publication from the dataset : .
- Edit an existing Organization/Department : .
- Edit information of an existing person : .
- Remove Person from an Organization/Department : .

- Remove a Publication from Person-Organization association : .
- Remove a person from the dataset : .
- Remove all persons from an Organization/Department : .
- Remove all publications associated with a Person : .
- Remove all publications associated with an Organization/Department : .
- Remove an existing Organization/Department from the dataset : .