



Institution Profile Wizard (IPW) for Scopus

User Guide

September 2018

Gillian Griffiths

How does an institute access Institution Profile Wizard?

1. Use is restricted to **named authorized users** selected by the institution. Normally this should not be more than three users per institution.
2. Selected IPW users from an organization should have:
 - Familiarity with Scopus.com
 - Knowledge of the organization's hierarchical structure
 - Knowledge of all campus and satellite locations and the names they are known by
3. A form for the institution to provide authorization of their users has been prepared by Elsevier legal team. This should be signed and returned to Elsevier together with the individual Scopus usernames of the authorized users. More information and a link to request the form can be found at <https://blog.scopus.com/posts/scopus-institution-profile-wizard/>

Important: IPW users will need to register in their Scopus account if they have not yet done so, and use it to log in on Scopus at least once before access can be given.

Key Functions of the Institution Profile Wizard

Function 1 – Modify Hierarchy

- Review/Update institutional hierarchy
- Remove and add child institutions
 - Indicate full or partial ownership of institutes you add
- Place affiliations at the correct level in the organizational structure

Function 2 – Modify Profile

- Check and update preferred name and address details
- Add addresses for multiple locations, or in different languages
- View, remove and add alternate names for an institution

Function 3 – Create Profile

- Request creation of a new profile if one does not exist in Scopus

Where can I find the wizard on Scopus?

1. If you are an authorized IPW user, log in to Scopus.
2. From the Affiliation search form, find your organization

Refine results

Limit to Exclude

City

Amsterdam (1) >

London (1) >

Country/Territory

Sort on:

All Show all documents Give feedback

	Affiliation name	Documents	Institution	City
<input type="checkbox"/> 1	Elsevier	230	230	Amsterdam

Scopus Search Sources Alerts Lists Help ▾ SciVal ↗ Gillian Griffiths ▾

Affiliation details - Elsevier

About Scopus Affiliation Id

< Return to search results 1 of 2 Next >

Export Print

Documents, affiliation only
230

Authors
528

Elsevier

Follow this affiliation

Radarweg 29, 1043 NX, Amsterdam
Netherlands
Affiliation ID: 60015522

View potential affiliation matches

Modify institution profile Set feed

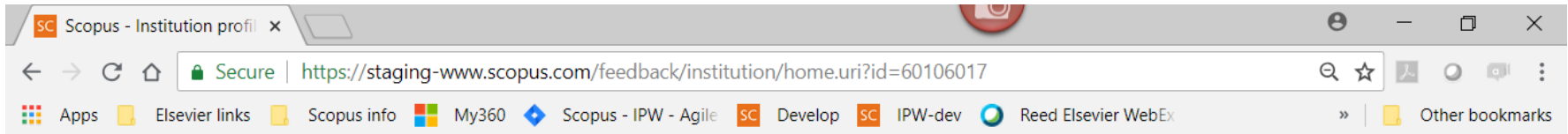
Other name formats: Elsevier Elsevier Scientific Publishing Company Elsevier Labs Elsevier Science B

View all ▾

3. Open Affiliation details page. Link to “Modify profile” opens the wizard.

Note: Once you have returned your letter of authorization and received confirmation of administrator access for your user name, this link should appear when you are logged in. If you still see “Send feedback” (refresh to check!), let us know at affiliationfeedback@scopus.com

Accept terms and conditions to continue



Scopus

Search Sources Alerts Lists Help ▾ SciVal ▶ IPWSuperUser Test ▾

Institution profile wizard

Terms and conditions

As an administrator appointed and confirmed in consultation between Elsevier and your institution, you are authorized to manage your organizational profile via the Institutional Profile Wizard ("IPW") and post updates. All access to the IPW is conditional upon a concurrent active Institutional subscription to Scopus.com between your institution and Elsevier. We shall have the right in our sole discretion to remove any submission to the IPW. All use of the IPW shall be subject to Elsevier's website terms and conditions.

I agree to the terms and conditions

Continue

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Function 1 - Modify Hierarchy

Click 'start' on the 'Modify hierarchy' tile to check and edit the relationships within your institution

The screenshot shows the Scopus 'Institution profile wizard' for the University of Elsevier. The interface includes a top navigation bar with 'Scopus' and links for 'Search', 'Sources', 'Alerts', 'Lists', 'Help', 'SciVal', and 'Gillian Griffiths'. The main heading is 'Institution profile wizard'. Below this, the user is prompted to 'Review and modify the profile for: University of Elsevier'. Three options are presented as tiles: 'Modify hierarchy' (highlighted with a red box), 'Modify profile', and 'Create profile'. Each tile lists specific actions and includes a 'Start >' button.

Scopus Search Sources Alerts Lists Help SciVal Gillian Griffiths


Institution profile wizard

Review and modify the profile for: University of Elsevier

- Modify hierarchy**
 - Modify affiliation relationships within hierarchy
 - Add and remove profiles in the hierarchy[Start >](#)
- Modify profile**
 - Update affiliation details (preferred name, address, website)
 - Add and remove alternate names for the affiliation[Start >](#)
- Create profile**
 - Provide affiliation details (preferred name, address, website)
 - Add alternate names for the affiliation[Start >](#)

Modify hierarchy:

- Remove affiliations that don't belong
- Change level of affiliation in the hierarchy
- Add affiliations by search (or copy in special cases)
- Approve the hierarchy for exposure on Scopus if there are no corrections

 Review and modify the hierarchy for: Reed-Elsevier

[View full instructions for using this hierarchy, including keyboard controls](#)

Hierarchy work space






 Approve Hierarchy


Review changes and confirm >

+ Add affiliation to hierarchy

Affiliations to place [Hide](#)

Removed affiliations [Hide](#)

Affiliations ^①	City	Documents, affiliation ^①	Documents, institution ^①	Actions
 Reed-Elsevier	London	12	278	
1 <input type="text"/> Elsevier	Amsterdam	231	231	 
2 <input type="text"/> Excerpta Medica	Bridgewater	37	37	 

 Undo all changes

 Approve Hierarchy

Review changes and confirm >

Modify hierarchy: find, add and place an affiliation

1. Click **+ Add affiliation to hierarchy** to search for one that is missing
2. Select affiliations to add. The affiliation now appears in the work space ready to be placed into the hierarchy.

view and modify the hierarchy for: RECORD-ELSEVIER

Instructions for using this

work space

to hierarchy

ace Hide

ions Hide

①

evier

A screenshot of a search dialog box titled "Search for an affiliation". The search term "music" is entered in the input field. The dialog contains a table of search results with columns for "Affiliation", "City", and "Documents". The first result is selected with a red checkbox. The dialog also features a "Search Q" button, a "Cancel" button, and an "Add selected" button.

Affiliation	City	Documents
<input checked="" type="checkbox"/> Hochschule fur Musik und Theater Rostock	Rostock	2
<input type="checkbox"/> Akademia Muzyczna im. Fryderyka Chopina w Warszawie	Warsaw	49
<input type="checkbox"/> Akademia Muzyczna im. I.J. Paderewskiego w Poznaniu	Poznan	4
<input type="checkbox"/> Akademia Muzyczna im. Karola Lipinskiego we Wroclawiu	Wroclaw	3

rove Hierarchy

ments, institution

27

Don't forget to place it!

- Selected affiliations appear in the work space but still need to be placed - or they will be dropped

Review and modify the hierarchy for: Reed-Elsevier

[View full instructions for using this hierarchy, including keyboard controls](#)

Hierarchy work space Approve Hierarchy Review changes and confirm >

[+ Add affiliation to hierarchy](#)

! Now place affiliations in hierarchy
Unplaced affiliations will not be added.

Affiliations to place [Hide](#)

⋮	Hochschule fur Musik Dresden	Dresden	3	3	+
⋮	Hochschule fur Musik und Theater Rostock	Rostock	2	2	+
⋮	Aichi Prefectural University of Fine Arts and Music	Aichi District	10	10	+

Removed affiliations [Hide](#)

- From the work space, place affiliations at the appropriate level in the hierarchy by dragging and dropping or using the numbering system.
- You can also click + in the work space to place the affiliation, then move it to change the level if necessary.

Placing affiliations in the hierarchy

+ Add affiliation to hierarchy

 **Now place affiliations in hierarchy**
Unplaced affiliations will not be added.










Affiliations to place [Hide](#)

⋮	2-1-1	Aichi Prefectural University of Fine Arts and Music	Aichi District	10	10	+
---	-------	---	----------------	----	----	---

Add this affi

Removed affiliations [Hide](#)

⋮						
---	--	--	--	--	--	--

⋮	Affiliations ⓘ	City	Documents, affiliation ⓘ	Documents, institution ⓘ	Actions
	Reed-Elsevier	London	12	278	
⌵ 1	Elsevier	Amsterdam	231	231	 
⌵ 1-1	Hochschule fur Musik Dresden	Dresden	3	3	 
⌵ 2	Excerpta Medica	Bridgewater	37	37	 
⌵ 2-1	Hochschule fur Musik und Theater Rostock	Rostock	2	2	 

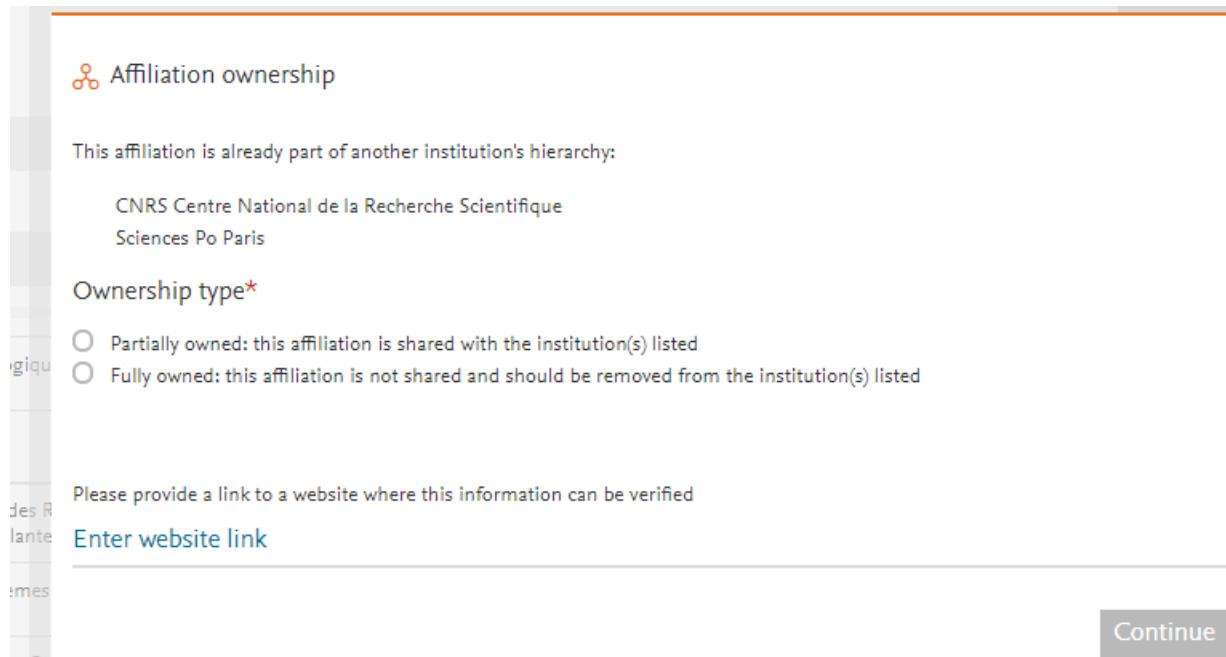
 Undo all changes

 Approve Hierarchy

[Review changes and confirm >](#)

Adding a shared affiliation

- When you add an affiliation that is already included in another institution's hierarchy, you will be asked to declare if it is shared with the other organizations or is owned solely by you and should be removed from them. Providing a URL reference to show the ownership will help the correction team verify your claim.



The screenshot shows a web form titled "Affiliation ownership" with an orange icon of three connected nodes. The form contains the following text and options:

Affiliation ownership

This affiliation is already part of another institution's hierarchy:

CNRS Centre National de la Recherche Scientifique
Sciences Po Paris

Ownership type*

Partially owned: this affiliation is shared with the institution(s) listed

Fully owned: this affiliation is not shared and should be removed from the institution(s) listed

Please provide a link to a website where this information can be verified

Enter website link














Continue

Ownership choices shown in list

If you have added an affiliation that is in another hierarchy, an icon shows this.

Clicking the icon allows you to review your choice of full or shared ownership.

Note: This icon only appears when you add a shared affiliation and state the type of ownership.

			 
18	18	 	
323	323	 	
12	12	 	
2	2	  	
637	637	 	

Placing an affiliation in a hierarchy – more details

- Affiliations are shown in alphabetical order at each level
- Copying an item allows it to be added at another level as well as the level it is presently at. This is only of interest in complex organisations, for example when a laboratory works sometimes with a parent institute and sometimes specifically with one of its children.
- For offline reference or checking with colleagues, you can export the present hierarchy from the link at top right. Note that this shows the **existing situation before your changes**, since the changes you are requesting have not yet been made.

Function 2 – Modify profile

Click 'start' on the 'Modify profile' tile to check or make changes to an individual institutional profile.

Scopus

Search

Sources

Alerts

Lists

Help ▾

SciVal ↗

Gillian Griffiths ▾



Institution profile wizard

Review and modify the profile for: University of Elsevier

Modify hierarchy

- Modify affiliation relationships within hierarchy
- Add and remove profiles in the hierarchy

Start >

Modify profile

- Update affiliation details (preferred name, address, website)
- Add and remove alternate names for the affiliation

Start >

Create profile

- Provide affiliation details (preferred name, address, website)
- Add alternate names for the affiliation

Start >

Modify profile

Scopus

[Search](#)[Sources](#)[Alerts](#)[Lists](#)[Help](#) ▾[SciVal](#) ▸[Gillian Griffiths](#) ▾

Institution profile wizard

[Export](#)

Review and modify the profile for: Reed-Elsevier


[Review affiliation details](#)[Review alternate names](#)[Add alternate names](#)[Review changes and submit](#)

Here you can make changes to the Scopus Institution Profile for any institution for which you have access. There are four possible steps in this process, including adding and removing alternate names.

An **alternate name** is derived from the affiliation text in one or more documents attributed to your organization. There may be many of these, depending on how your institution has been referenced by authors and publishers.

Modify profile: 1. Name and address information

- You can change the preferred name or address for the institution.
- You can also add secondary addresses, for example if you have more than one campus address that is used when referencing your affiliation – or if the address is cited in more than one language
- The system may offer a spelling suggestion if you type an unexpected city name. To accept the suggestion, check the box. To ignore it, leave the box unchecked.

 Review and modify the profile for: Reed-Elsevier

[Review affiliation details](#) — [Review alternate names](#) — [Add alternate names](#) — [Review changes and submit](#)

Affiliation details Next >

* Required field

Preferred name *
Reed-Elsevier ×


Institution home page *
<http://www.reed-elsevier.com/> ×

Primary address:

Mailing (street) address *
1-3 Strand × City *
London ×

Country *
Country ▼ State/Province Postal (zip) code
WC2N 5JR ×

Secondary address:

Mailing (street) address*  City*

Country *
Country ▼ State/Province Postal (zip) code

Modify profile: 2. Review existing alternate names

This page shows the alternate names already attached to the profile.

Alternate names refer to the different ways that the institute has been listed in the affiliations in the published documents indexed in Scopus. This not only links the associated documents to a profile, but also enables better recognition of future documents by the matching process.

- Review the list to check whether they all belong here. If not, delete using the trash icon.
- The deleted items are placed in the work space at the top of the page. Click “undo” to replace them. When finished, press **Review and confirm** to see the changes you are requesting. No changes are sent until you confirm.
- To help judge whether the name should be included, you can select [View details](#). This shows information from the documents grouped in that alternate name.

Modify profile: 2. Deleted alternate names appear in work space

Review alternate names [ⓘ](#) Next >

The alternate names below are currently included in this affiliation profile. Review the list and remove any names that are not part of your institution. Use the View details link to review the affiliation details, authors, and documents associated with the name.

Removed alternate names [Hide](#)

Undo	Kohima Educational Trust		United Kingdom	1	View details
Undo	Scientists for Global Responsibility		United Kingdom	1	View details
Undo	Reed Elsevier Inc	New Providence	United States	3	View details

These alternate names are currently associated with your institution. Do they belong?

1 - 11 of 11 entries

Filter by: [City](#) [Country](#)

Sort on: [Document estimate \(highest\)](#)

Remove	Alternate name	City	Country	Document estimate	
🗑️	Reed Elsevier	London	United Kingdom	3	View details
🗑️	Reed Elsevier Group plc		United Kingdom	3	View details
Removed	Reed Elsevier Inc	New Providence	United States	3	View details
🗑️	a division of Reed Elsevier)		United Kingdom	2	View details
Removed				1	View details


Deleted items are collected in the work space.

“Undo” will return them to the list.

Note that no changes will be submitted until you confirm.

Modify profile: 3. Choose alternate names to add





Export

 Review and modify the profile for: Reed-Elsevier

Review affiliation details — Review alternate names — **Add alternate names** — Review changes and submit

Add alternate names ⓘ Review changes and confirm >

You can add names to your affiliation's profile by adding from the suggested names below, or by searching for alternate names.

Added alternate names		Hide			
 Undo	Elsevier Ltd.	London	United Kingdom	21	View details
 Undo	Elsevier	London	United Kingdom	42	View details
 Undo	Elsevier Limited	Kidlington	United Kingdom	2	View details
 Undo	Elsevier Science	Oxford	United Kingdom	6	View details

Would you like to add any of these alternate names?

Filter by: City Country

Sort on: Relevance

Add	Alternate name	City	Country	Document estimate
<input type="checkbox"/>	Reed Elsevier Properties SA		Switzerland	1 View details

You will see some names that may belong. Click + to select those that do: they now appear in the work space

The View details link shows information from the documents attached to that name, to help you judge if the name should be included.

Alternate names 1: filter the list by city or country

These alternate names are currently associated with your institution. Do they belong?

1 - 8 of 8 entries

Filter by: City Country Sort on: Document estimate (highest)

Remove	Alternate name	City	Country	Document estimate
<input type="checkbox"/>	Reed Elsevier	London	United Kingdom	3 View details
<input type="checkbox"/>	Reed Elsevier	Miamisburg	United States	3 View details
<input type="checkbox"/>	Reed Elsevier	New Providence	United Kingdom	2 View details
<input type="checkbox"/>	Reed Elsevier	London	United Kingdom	1 View details
Removed	Division of Reed-Elsevier Inc.	Miamisburg	United States	1 View details
<input type="checkbox"/>	Elsevier and Reed-Elsevier	London	United Kingdom	1 View details
<input type="checkbox"/>	Reed-Elsevier, Inc.	Miamisburg	United States	1 View details
Removed	Scientists for Global Responsibility		United Kingdom	1 View details

Modal dialog: Reed Elsevier London (2) Miamisburg (2) New Providence (1)

Remember that this information comes from original articles: there may be errors or missing data here. Do not delete names that look “wrong” unless you wish to remove the associated documents from your profile!

Alternate names: View details and select documents

Do ANY of these documents belong in your profile? ✕

No None of these documents belong to my institution. Remove this name from my profile.

Yes Some or all of these documents belong to my institution.


Deselect documents and click Apply to remove them from your profile. Cancel Apply

Document title	Affiliation authors	Affiliation name (from document)
<input type="checkbox"/> Susan Brooks: An appreciation of her tenure as Editor-in-Chief of Acta Histochemica	Higgins U.,Mehner S.	Elsevier GmbH, Munich
<input checked="" type="checkbox"/> KIM - Komplementäre und Integrative Medizin, Artztezeitschrift für Naturheilverfahren: Editorial (opens in a new window)	Schmidt S.	Elsevier GmbH,80333 München,Karlstraße 45,
<input type="checkbox"/> Characteristics and external validity of the German Health Risk Institute (HRI) Database	Walker J.	Elsevier GmbH,Munich,
<input type="checkbox"/> How can we define and analyse drug exposure more precisely to improve the prediction of	Schieborr U.	Elsevier GmbH,Munich,

- This page shows the information from each document that contributes to the alternate name you are viewing
- Only the authors linked to the affiliation are shown here, not all authors
- You can **uncheck** individual documents to have them removed from the alternate name – either when adding or when deleting
- Click on the title to see the document in Scopus

View details: icons help keep track



A check mark in the list helps you keep track of which alternate names have been viewed.

Another icon  shows you which alternate names have been edited (i.e documents have been removed).

Would you like to add any of these alternate names?

Filter by: City Country

Sort on: Relevance

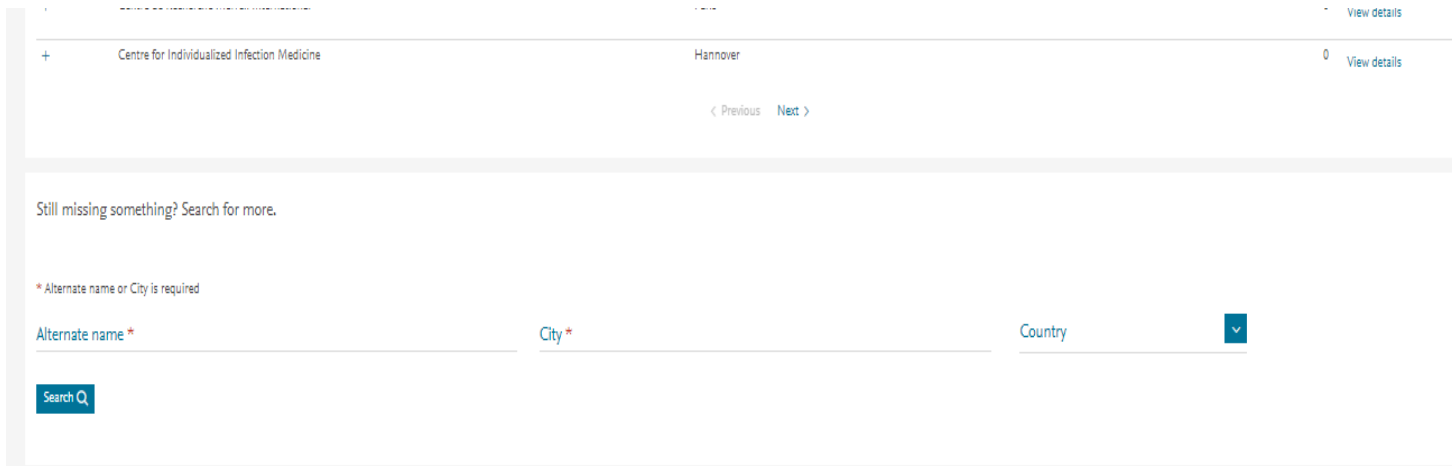
Add	Alternate name	City	Country	Document estimate
Added	Elsevier Science Publishers, B.V.	Amsterdam	United States	3  View details
Added	Elsevier Science B.V.	Amsterdam	Netherlands	2 <input checked="" type="checkbox"/> View details
+	Catfix B.V. Science Park 904	Amsterdam	Netherlands	3  View details
+	Elsevier Pub. Co.	Amsterdam	United States	
+	Editions Scientifiques Elsevier	Paris	France	2 <input checked="" type="checkbox"/> View details
+	Life Science Methods B.V.	Leiden	Netherlands	
+	Science and Technology b.v		Netherlands	2 View details
+	Cosine Science and Computing B.V.	Leiden	Netherlands	1 View details

Modify Profile: Save Draft

- During any of the steps in “Modify Profile” you will be able to save a draft of the request you are constructing. This is useful if you cannot finish in one session, or if you wish to consult with others before sending.
- When you return to Modify Profile after previously saving a draft, you will be given the choice to use the draft or start again. If you choose to start again this will delete the draft.
- A saved draft may no longer be valid if something has changed since you saved it – for example, if there have been significant updates to a profile’s contents, or if another user at your institution has since submitted a request. In this case you can still print your old draft for reference, but you will have to start a new request.

Modify Profile 3 and Create Profile 2

Search for other alternate names



Centre for Individualized Infection Medicine Hannover 0 View details

< Previous Next >

Still missing something? Search for more.

* Alternate name or City is required

Alternate name * City * Country

Search Q

- To find more names you may wish to add, use the search form on this page.
- From the results you can add alternate names in the same way as explained above.

Function 3 – Create profile

You should only create a new profile if you cannot find your profile in Scopus, and if you need that affiliation to be counted separately under your institution. Creating duplicates could cause a split in document attribution.

If an affiliation within your doesn't have a profile, click 'start' on the **'Create profile'** tile

Scopus

Search

Sources

Alerts

Lists

Help ▾

SciVal ↗

Gillian Griffiths ▾



Institution profile wizard

Review and modify the profile for: University of Elsevier

Modify hierarchy

- Modify affiliation relationships within hierarchy
- Add and remove profiles in the hierarchy

Start >

Modify profile

- Update affiliation details (preferred name, address, website)
- Add and remove alternate names for the affiliation

Start >

Create profile

- Provide affiliation details (preferred name, address, website)
- Add alternate names for the affiliation

Start >

Function 3 – Create profile

1. Provide name, address, etc.

Affiliation details:

* Required field

Preferred name *

Institution home page *

Primary address:

Mailing (street) address *

City *

Country *

Select



Postal (zip) code

2. Add alternate names the institution is known by and which are found in Scopus.

This is done by searching and selecting, as described under [Modify Profile](#)
We cannot accept a new profile until it has been connected via alternate names to publications in Scopus.

Review and confirm

All the changes you request using this Wizard are sent to the Scopus **Institutional Correction Team**.

- You will receive an automatic message confirming receipt of your request.
- You may be approached by the team if there are questions about your request
- Depending on the complexity of the request, and the volume of requests we receive, we expect changes to appear on Scopus within a few days to two weeks. This may take longer in busy periods. You will receive notification when the changes have been made.
- If you do not receive any notification or see the changes on Scopus within two to three weeks, please request information from affiliationfeedback@scopus.com quoting the ticket number.