Institution Profile Wizard (IPW) for Scopus

User Guide
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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/](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.
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

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
Function 1 - Modify Hierarchy

Click ‘start’ on the ‘Modify hierarchy’ tile to check and edit the relationships within your institution.
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
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.
Don’t forget to place it!

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

- 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 can 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

<table>
<thead>
<tr>
<th>Affiliation</th>
<th>City</th>
<th>Documents, affiliation</th>
<th>Documents, institution</th>
</tr>
</thead>
<tbody>
<tr>
<td>2-1-1</td>
<td>Aichi District</td>
<td>10</td>
<td>10</td>
</tr>
</tbody>
</table>

Removed affiliations

Add this affiliation to hierarchy

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.
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.*
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.
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.

![Form screenshot](image)

### Affiliation details

<table>
<thead>
<tr>
<th>Required field</th>
<th>Preferred name</th>
<th>Institution name page</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Reed-Elsevier</td>
<td><a href="http://www.reed-elsevier.com/">http://www.reed-elsevier.com/</a></td>
</tr>
</tbody>
</table>

#### Primary address

<table>
<thead>
<tr>
<th>Required field</th>
<th>Mailing (street) address</th>
<th>City</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1-3 Strand</td>
<td>London</td>
</tr>
</tbody>
</table>

#### Secondary address

<table>
<thead>
<tr>
<th>Required field</th>
<th>Mailing (street) address</th>
<th>City</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Country</th>
<th>State/Province</th>
<th>Postal (zip) code</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>WC2N 5JR</td>
</tr>
</tbody>
</table>
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

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

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?

<table>
<thead>
<tr>
<th>Remove</th>
<th>City</th>
<th>Country</th>
<th>Sort on: Document estimate (highest)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td> </td>
<td>United Kingdom</td>
<td>3 View details</td>
</tr>
<tr>
<td></td>
<td> </td>
<td>United States</td>
<td>3 View details</td>
</tr>
<tr>
<td></td>
<td> </td>
<td>United Kingdom</td>
<td>2 View details</td>
</tr>
<tr>
<td></td>
<td> </td>
<td>United States</td>
<td>1 View details</td>
</tr>
<tr>
<td></td>
<td> </td>
<td>Miamisburg</td>
<td>1 View details</td>
</tr>
<tr>
<td></td>
<td> </td>
<td>London</td>
<td>1 View details</td>
</tr>
<tr>
<td></td>
<td> </td>
<td>United Kingdom</td>
<td>1 View details</td>
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<td>United States</td>
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<td>Miamisburg</td>
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<td>United Kingdom</td>
<td>View details</td>
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<td>View details</td>
</tr>
<tr>
<td> </td>
<td> </td>
<td>Miamisburg</td>
<td>View details</td>
</tr>
</tbody>
</table>

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!
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).
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

- 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
Function 3 – Create profile

1. Provide name, address, etc.

Affiliation details:
* Required field

Preferred name *
Institution home page *

Primary address:
Mailing (street) address *
Country *
City *
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.