



ELSEVIER

Scopus Institutional Profile Wizard (IPW)

User Guide

April 2023

Version 9



Access to the Institution Profile Wizard

- Use is restricted to **named authorized users** selected by the institution. Normally this should not be more than three users per institution. IPW users will need to create a personal login within their Scopus account and use it to log in on Scopus at least once before access can be given.
- Selected IPW users from an organization should be familiar with Scopus and have knowledge of the organization's structure and of all campus and satellite locations and the names they are known by.
- A form for the institution to provide authorization of their users must 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/>.

What it does

Function 1 – Modify Hierarchy

- Review/Update institutional hierarchy
- Remove and add child institutions
- Indicate full or partial ownership of institutes you add
- Place institutions 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 documents grouped under alternate names for an institution

Function 3 – Create Profile

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

Where is the Wizard on Scopus?

1. If you are an authorized IPW user, log in to Scopus with the account you used to register for access.
2. From the Affiliation search, find your organization and open the Affiliation details page
3. You will see a link “Edit institution profile”. Click to enter IPW.

The screenshot shows the Scopus interface. At the top left is the Scopus logo. To the right are navigation links: Search, Sources, SciVal, a help icon, a notification bell, a building icon, and a user profile icon labeled 'CR'. Below the navigation is a light blue banner with a message: "The new, enhanced version of the Organization profile page is available." and a button "Try the test version". The main heading is "Affiliation details - Elsevier B.V." with a link "About Scopus Affiliation Identifier". On the right side of the main content area are "Print" and "Email" icons. The main content area displays "Elsevier B.V." with the address "Radarweg 29, Amsterdam, Noord-Holland, Netherlands" and "Affiliation ID: 60015522". Below this are several buttons for "Other name formats": Elsevier Masson, Elsevier, Elsevier Masson Sas, C/o Elsevier Masson, Elsevier B.v., Elsevier Science, Elsevier Inc., Elsevier Advanced Technology, Elsevier Labs, and Elsevier Ltd. On the right side of the main content area is a box titled "Affiliation profile actions" containing three links: "Edit institution profile" (highlighted with a red box and a red arrow), "Set document alert", and "Export subject area data".

Troubleshooting access

If you have returned the authorization and been granted access, but still see “Send feedback” (refresh to check!) on the Affiliation details page instead of “Edit institution profile”:

- Check that you are logged in to Scopus with the same user account specified in the application letter
- If your institution uses a group access such as Shibboleth, you will need to first create a personal account while you are within the institution’s IP range (on campus) – so that we can recognize the institution to which you belong.
- Please contact Scopus customer support via “Contact us”, using the category “Access” and clearly mentioning “IPW” in the header
- <https://service.elsevier.com/app/contact/supporthub/scopuscontent/>

Accept terms and conditions to continue



Scopus

[Search](#)

[Sources](#)

[SciVal](#)



CR

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](#)

About Scopus

[What is Scopus](#)
[Content coverage](#)
[Scopus blog](#)
[Scopus API](#)

Language

[日本語版を表示する](#)
[查看简体中文版本](#)
[查看繁體中文版本](#)
[Просмотр версии на русском языке](#)

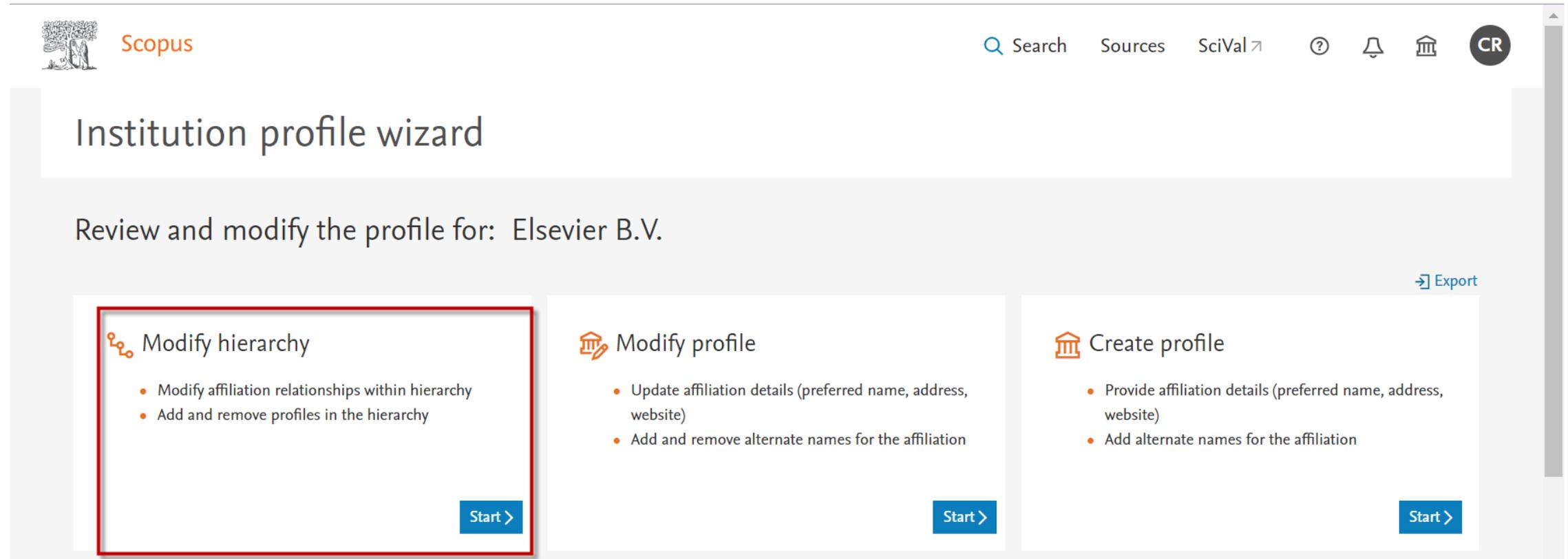
Customer Service

[Help](#)
[Tutorials](#)
[Contact us](#)



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' interface. At the top left is the Scopus logo. The top right navigation bar includes 'Search', 'Sources', 'SciVal', a help icon, a notification bell, a building icon, and a 'CR' profile icon. The main heading is 'Institution profile wizard'. Below it, the text reads 'Review and modify the profile for: Elsevier B.V.' and an 'Export' link is visible. Three main tiles are displayed: 'Modify hierarchy' (highlighted with a red border), 'Modify profile', and 'Create profile'. Each tile contains a list of actions and a 'Start >' button.

Scopus

Search Sources SciVal ? CR

Institution profile wizard

Review and modify the profile for: Elsevier B.V. [Export](#)

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: Elsevier B.V.

[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 i	City	Documents, affiliation i	Documents, institution i	Actions
 RELX Group	London	72	3,001	
 1  Elsevier B.V.	Amsterdam	2,838	2,934	 
1-1  Excerpta Medica	Bridgewater	44	44	 
1-2  International Center for the Study of Research	Amsterdam	4	4	 
1-3  Parity Computing	San Diego	6	6	 

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. Those selected now appear in the work space ready to be placed into the hierarchy.

Search for an affiliation

music

Search Q

Cancel Add selected

Affiliation	City	Documents
<input checked="" type="checkbox"/> Hochschule für Musik und Theater Rostock	Rostock	2
<input type="checkbox"/> Akademia Muzyczna im. Fryderyka Chopina w Warszawie	Warsaw	48
<input type="checkbox"/> Akademia Muzyczna im. I.J. Paderewskiego w Poznaniu	Poznan	6
<input type="checkbox"/> Akademia Muzyczna w Krakowie	Krakow	2
<input type="checkbox"/> Akademia Muzyczna im. Karola Lipinskiego we Wroclawiu	Wroclaw	4
<input type="checkbox"/> Aichi Prefectural University of Fine Arts and Music	Aichi District	10
<input type="checkbox"/> Ankara Music and Fine Arts University	Ankara	8
<input type="checkbox"/> Kunstuniversitat Linz	Linz	34

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 drag and drop 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.

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.

 Affiliation ownership

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

Baylor Health Care System

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](#)

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 if you have added a shared affiliation using this wizard and declared the type of ownership. Other affiliations may of course also be co-owned.

6	6	 
50	50	 
933	933	  

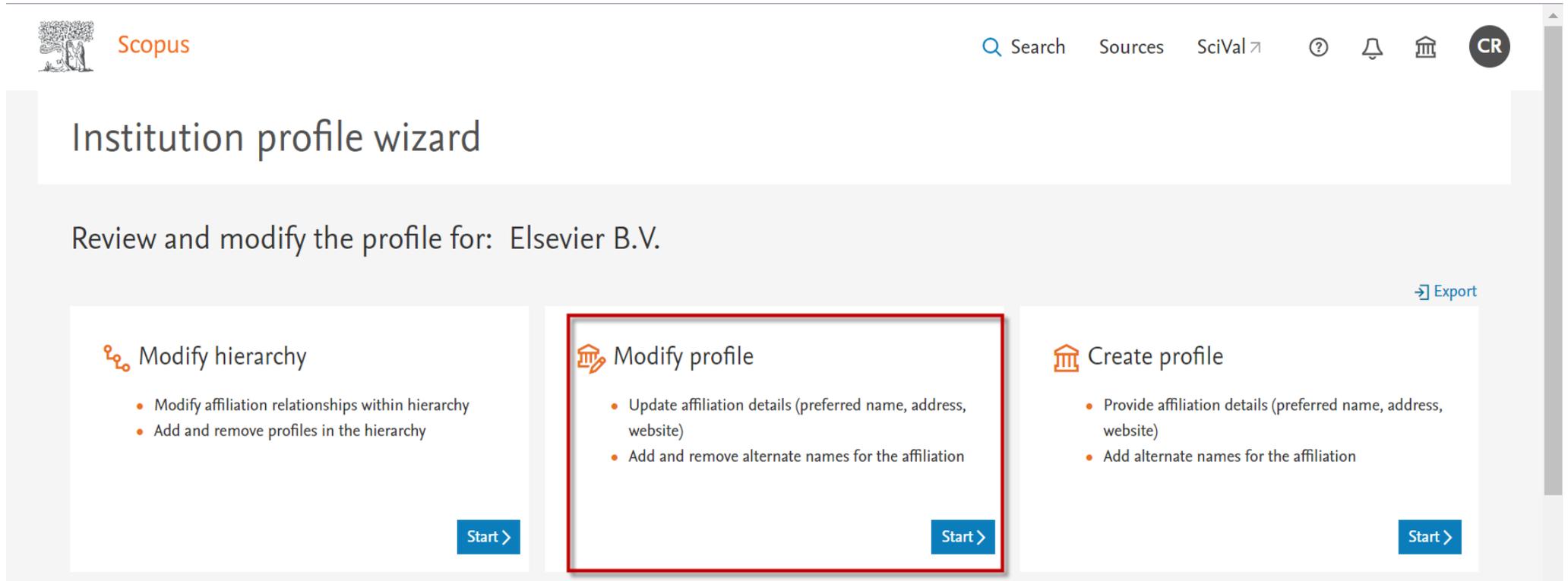
 Approve Hierarchy [Review changes and confirm >](#)

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 in the same hierarchy, as well as the level it is presently at. This is only of interest in complex organizations, 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 “Export” 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.



The screenshot shows the Scopus 'Institution profile wizard' for Elsevier B.V. The interface includes a top navigation bar with the Scopus logo, search, sources, SciVal, help, notifications, and user profile icons. The main content area is titled 'Institution profile wizard' and 'Review and modify the profile for: Elsevier B.V.'. There are three main tiles: 'Modify hierarchy', 'Modify profile', and 'Create profile'. The 'Modify profile' tile is highlighted with a red border and contains a 'Start >' button. An 'Export' link is visible in the top right corner of the wizard area.

Scopus

Search Sources SciVal ? CR

Institution profile wizard

Review and modify the profile for: Elsevier B.V.

[Export](#)

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 >

Easier access to other profiles in hierarchy

Links to all (entitled) profiles in a hierarchy are available on the IPW start page, as well as through the Affiliation details pages for each institution

Review and modify the profile for: Elsevier B.V. [Export](#)

 **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 >](#)

 **Want to modify another profile?**

Below is a list of profiles in your institution's hierarchy. You can click on the profile name to modify

Affiliations	City
 RELX Group	London
└─ Elsevier B.V.	Amsterdam
└─ Excerpta Medica	Bridgewater
└─ International Center for the Study of Research	Amsterdam
└─ Parity Computing	San Diego
└─ Science-Metrix	Montreal

Modify profile



Scopus

 Search

Sources

Sci



Review and modify the profile for: Elsevier B.V.

[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.



ELSEVIER

Modify profile: 1. Name and address information

- Change the preferred name or address for the institution.
- 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.**

Affiliation details Save draft Next >

* Required field

Preferred name*
Elsevier B.V. ×

Institution home page*
<https://www.elsevier.com/en-in> ×

Primary address:

Mailing (street) address*
Radarweg 29 × City*
Amsterdam ×

Country*
Netherlands ▼ State/Province
Noord-Holland × Postal (zip) code

Secondary address: 

Mailing (street) address*
Country*
Country ▼ State/Province
Postal (zip) code

Address +

[^ Top of page](#)

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.

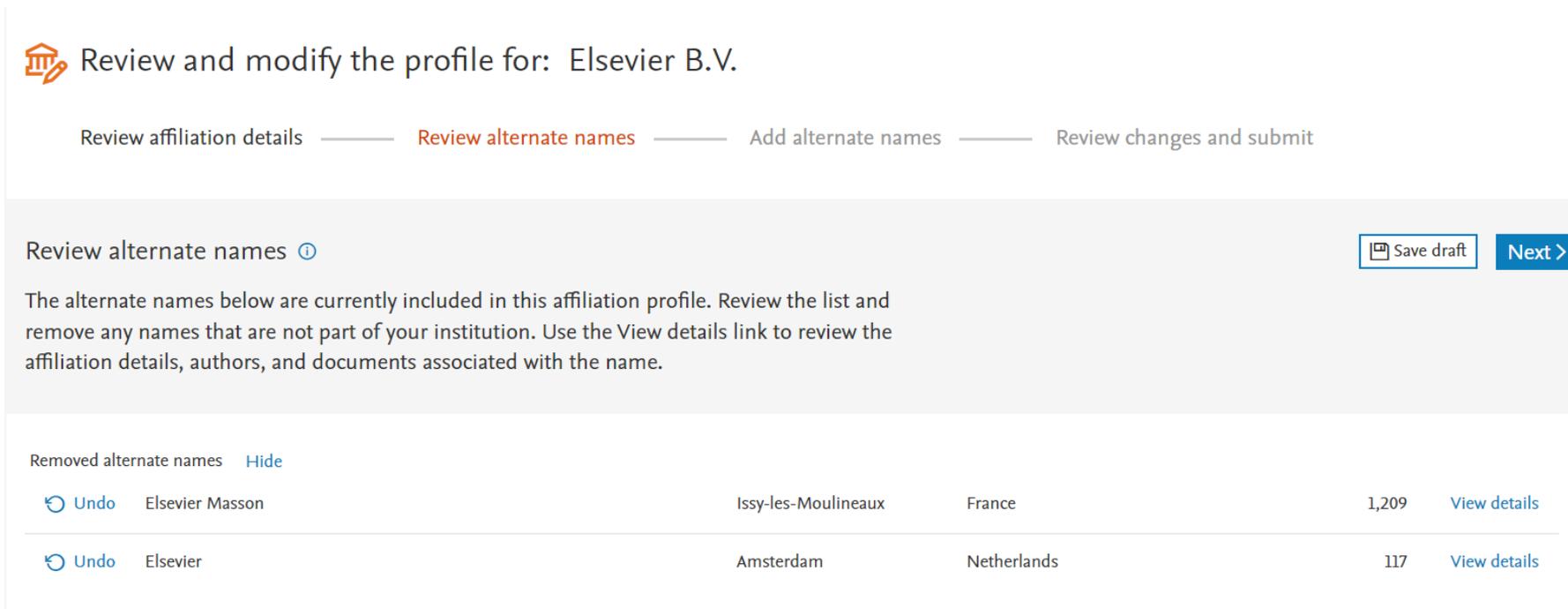
- Review the list to check whether they all belong here. If not, delete using the trash icon.
- The deleted items are placed in the work space at the top of the page. Click “undo” to replace them. When finished, press **Review and confirm** to see the changes you are requesting. No changes are sent until 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 items 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 at the end of the process.



 Review and modify the profile for: Elsevier B.V.

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

Review alternate names ⓘ Save draft 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	Elsevier Masson	Issy-les-Moulineaux	France	1,209	View details
 Undo	Elsevier	Amsterdam	Netherlands	117	View details

Modify profile: 3. Choose alternate names to add

 Review and modify the profile for: Elsevier B.V.

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

Add alternate names [?](#)

 Save draft

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 Clinical Solutions	1	View details
Undo	Elsevier Labs	2	View details
Undo	Elsevier Science	Finland	1 View details

You will see some names that may belong. Click + to select and add to the work space. The View details link opens and 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 - 20 of 27 entries

Filter by: **City** Country

Sort on: **Document estimate (highest)**

Remove	Alternate name	City	Country	Document estimate			
	Elsevier	<input type="checkbox"/> undefined (5) <input type="checkbox"/> amsterdam (4) <input type="checkbox"/> issy (4) <input type="checkbox"/> les (4) <input type="checkbox"/> moulineaux (4) <input type="checkbox"/> london (3)	<input type="checkbox"/> oxford (3) <input type="checkbox"/> cambridge (2) <input type="checkbox"/> berlin (1) <input type="checkbox"/> cedex (1) <input type="checkbox"/> frankfurt (1) <input type="checkbox"/> kidlington (1)	<input type="checkbox"/> new (1) <input type="checkbox"/> philadelphia (1) <input type="checkbox"/> rockville (1) <input type="checkbox"/> york (1)	France	1,209	View details
	Elsevier			France	129	View details	
	Elsevier			Netherlands	117	View details	
	C/o Elsevier			France	105	View details	
	Elsevier	London	United Kingdom	99	View details		
	Elsevier	Oxford	United Kingdom	95	View details		
	Elsevier	New York	United States	75	View details		

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? ×

None of these documents belong to my institution. Remove this name from my profile.

Some or all of these documents belong to my institution.

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

<input type="checkbox"/> Page	Document title	Affiliation authors	Year	Affiliation name (from document)
<input checked="" type="checkbox"/>	Trends in the clean energy research and innovation landscape on the path to net zero	Vignola-Gagné E. <small>(opens in a new window)</small>	2021	Elsevier Canada, QC, Montréal, H2J 1Y6,

Display:

Cancel

- 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.

• You can also check and uncheck a whole page at a time (useful if you only want to keep a few documents from each page)

• 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 you have already inspected. The edit 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	
+	Elsevier-Masson (Issy-Les-Moulineaux)			1	View details
+	Elsevier, Inc			1	View details
+	Elsevier Inc			1	View details
+	Elsevier Ltd			1	View details
Added	Elsevier Clinical Solutions			1	 View details
Added	Elsevier Labs			2	 View details
Added	Elsevier Science		Finland	1	View details
+	Mendeley		United States	1	 View details
+	Elsevier			2	 View details
+	Elsevier			1	View details
				2	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.
- Sometimes a saved draft may become invalid 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

Still missing something? Search for more.

Search for a name, city, or both. Add a country for more specific results.

Alternate name

City

Country



Search Q

[^ Top of page](#)

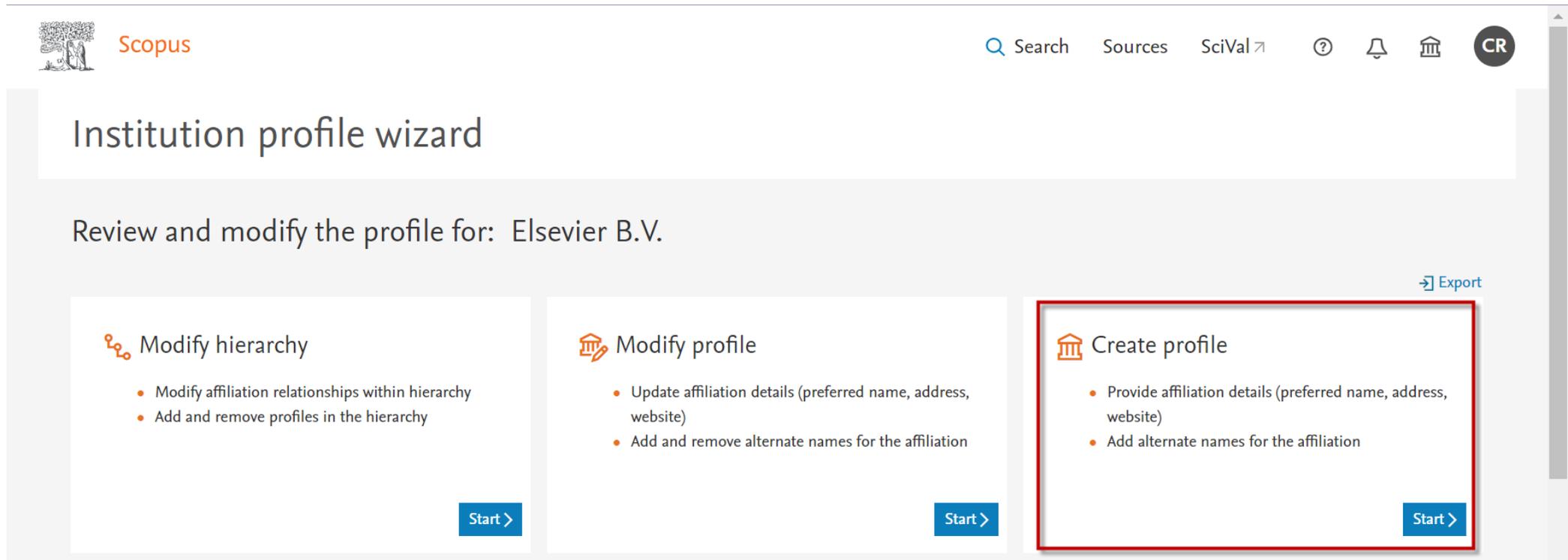
- To find more names you may wish to add, use the search form on this page.
- From the results you can add alternate names in the same way as explained above.
- Search as broadly as possible: If your search is too specific, it will not find items that have been missed due to missing or wrong information (e.g. wrong country)

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's output to be counted separately under your institution. Creating duplicates could cause a split in document attribution.

A profile can only be created if documents are in Scopus with that affiliation.

To create a new profile within your organization, click 'start' on the **'Create profile'** tile



The screenshot shows the Scopus website interface for the 'Institution profile wizard'. The page title is 'Institution profile wizard' and the subtitle is 'Review and modify the profile for: Elsevier B.V.'. There are three main tiles: 'Modify hierarchy', 'Modify profile', and 'Create profile'. The 'Create profile' tile is highlighted with a red border. The 'Create profile' tile contains the following instructions:

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

Each tile has a 'Start >' button at the bottom right. The 'Export' button is located at the top right of the wizard area.

Function 3 – Create profile

1. Provide name, address, etc.

Affiliation details Next >

* Required field

Preferred name *

Institution home page *

Primary address:

Mailing (street) address * City *

Country *

Country State/Province Postal (zip) code

^ Top of page

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 and containing a ticket number. **Please keep this message in case you need to ask for an update.**
- 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 **by replying to the original confirmation message.**

A note on Alternate names

We use the term “Alternate name” to refer to something that is quite complex. As documents are added to Scopus, algorithmic processing groups the affiliations recognized as similar into clusters. Next, the clusters are compared to the information about institutions held in the organization database. If a match of sufficient certainty is found, the documents are assigned to the profile for that institution. When it is not possible to be entirely certain, the clusters remain unlinked to any profile.

It is these clusters that are shown in IPW as “Alternate names”. They are labelled with the most likely/frequent information taken from the affiliations they contain. This is why many Alternate names appear to be the same when listed – though when you view the contents you will understand why they are not all in the same group.

It can be confusing for those using IPW when the lists of “Alternate names” change – entries may disappear or seem to reappear after removal. Because the clusters are not fixed entities, but based on probabilities, they can change as information is added to the matching system – from new articles, the selections you make via IPW, and other curation efforts. This input can increase the certainty about any cluster or document, allowing reorganization of the contents into consistent groups.

Thank you

