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/.

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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

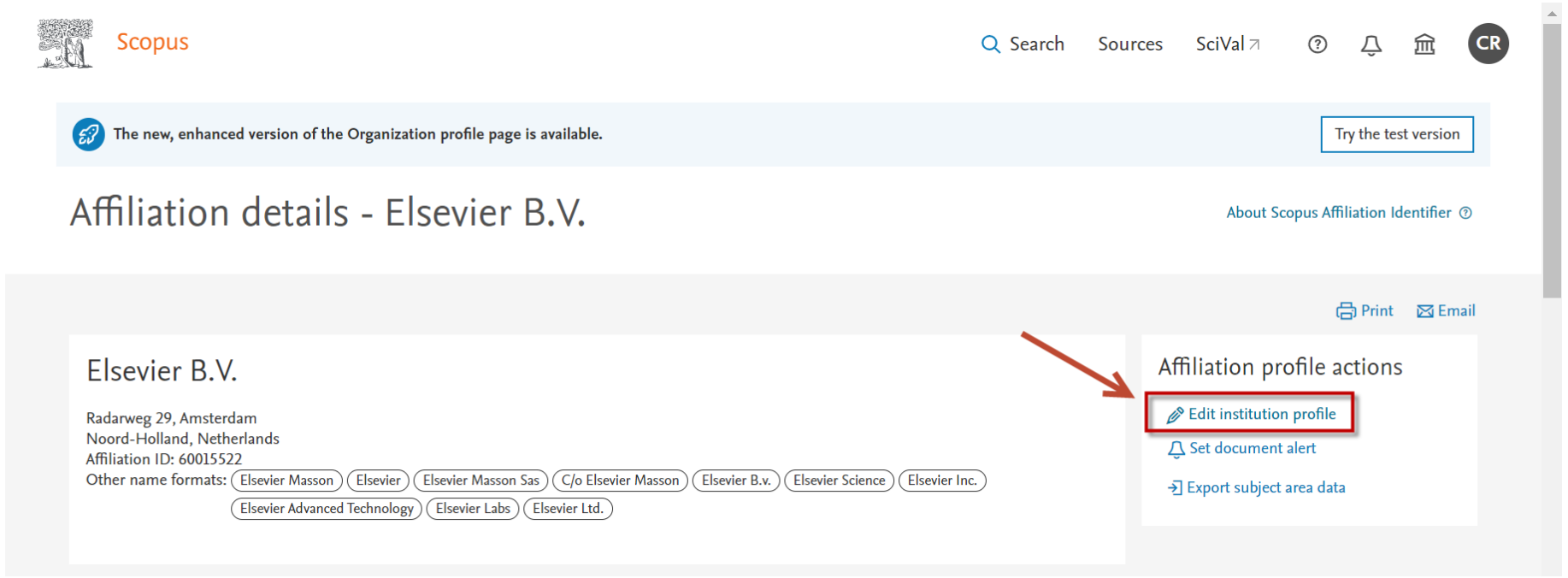
- Request creation of a new profile if one does not exist in Scopus

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.



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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/

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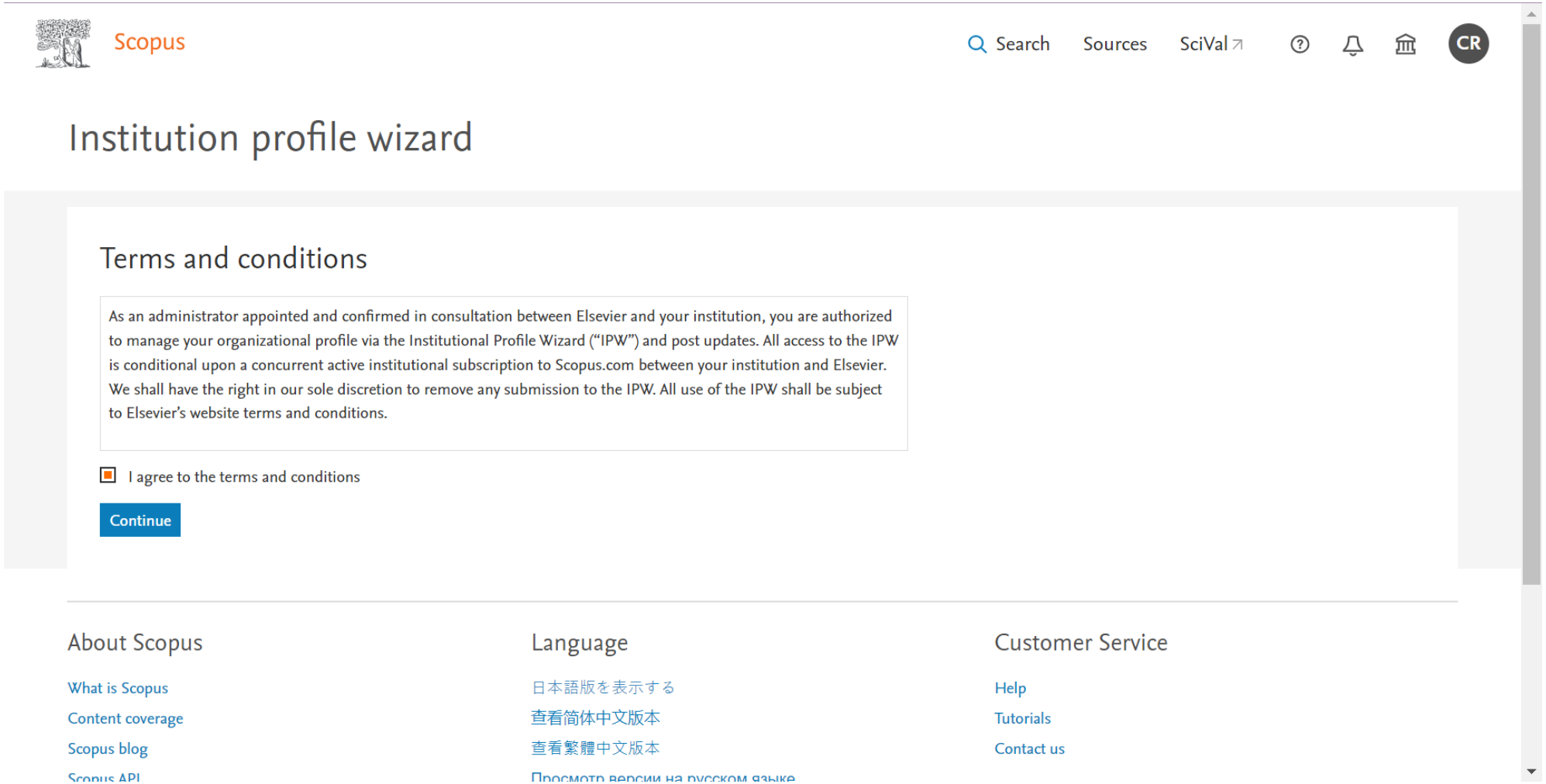
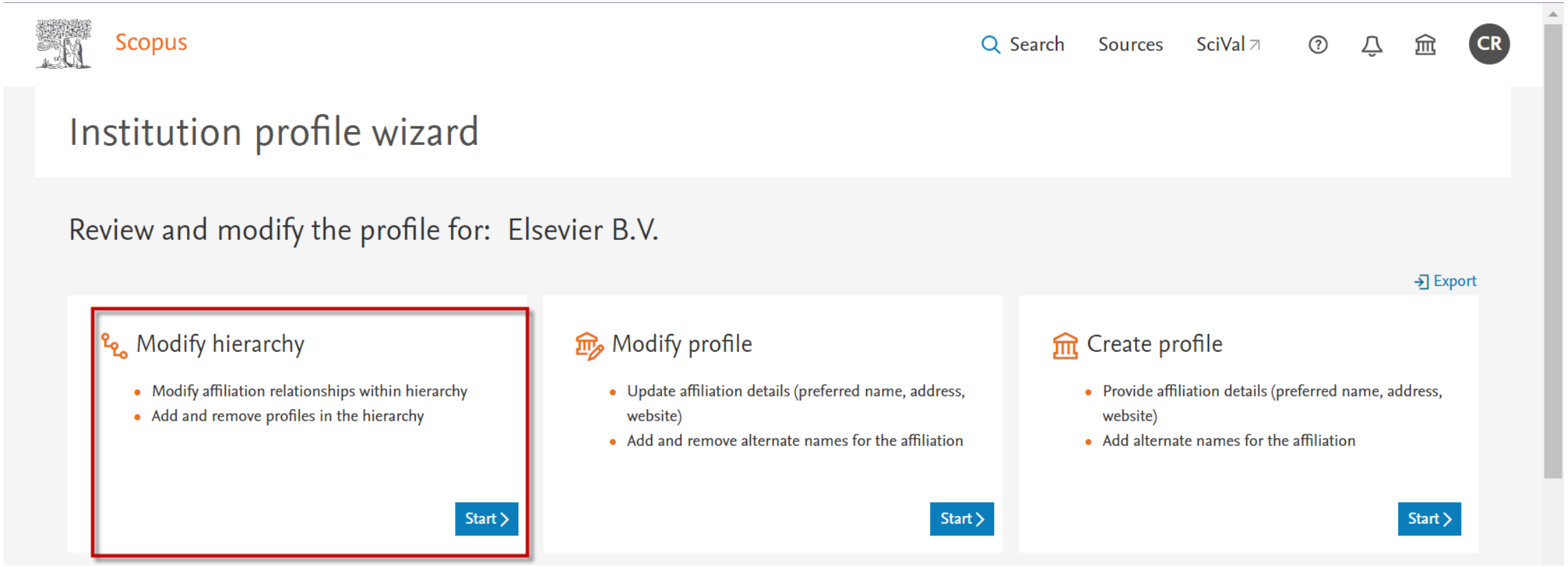
Accept terms and conditions



Function 1 - Modify Hierarchy

Click ‘start’ on the **‘Modify hierarchy’** tile to check and edit the relationships within your institution



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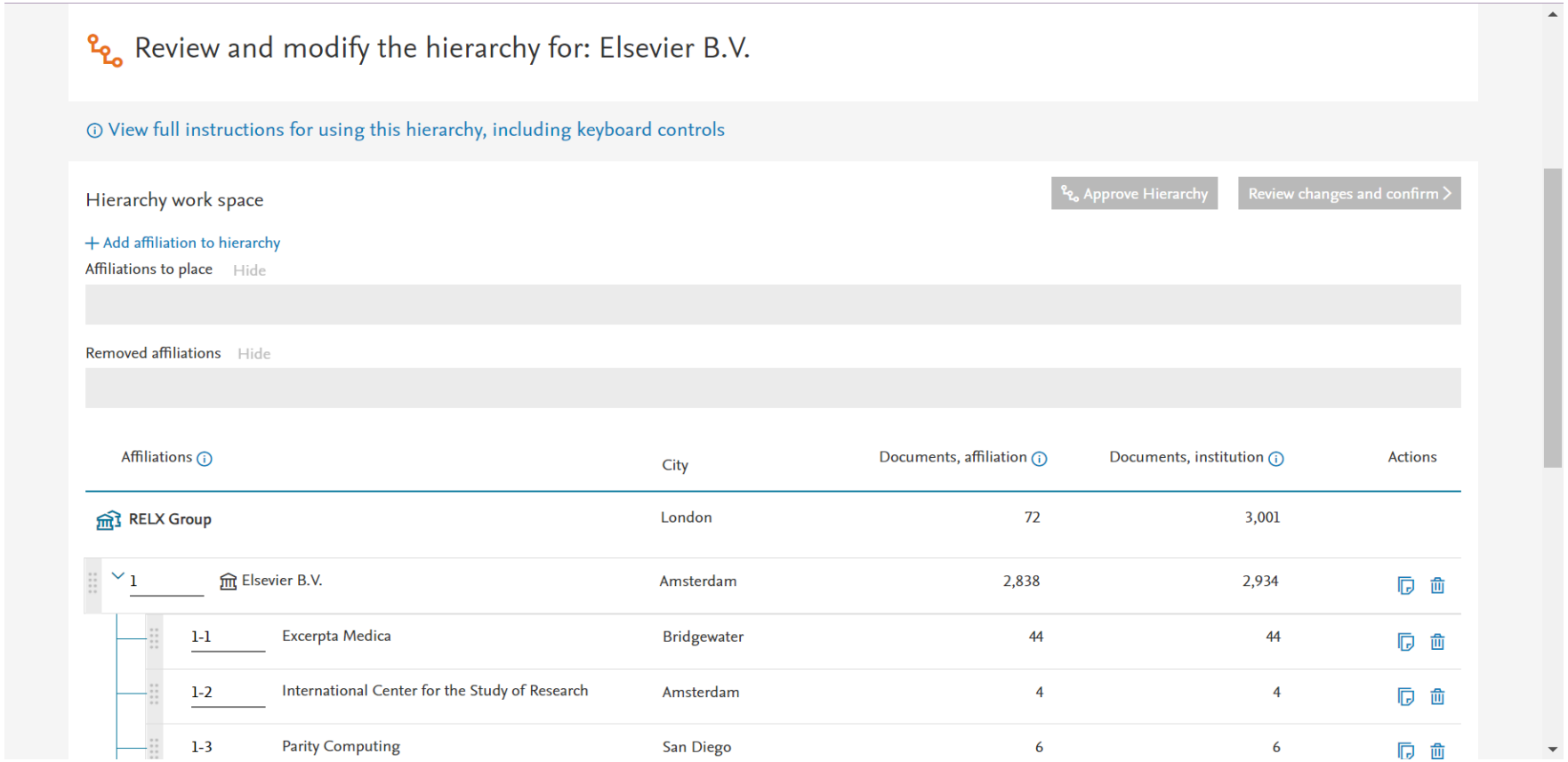
Modify hierarchy

- 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



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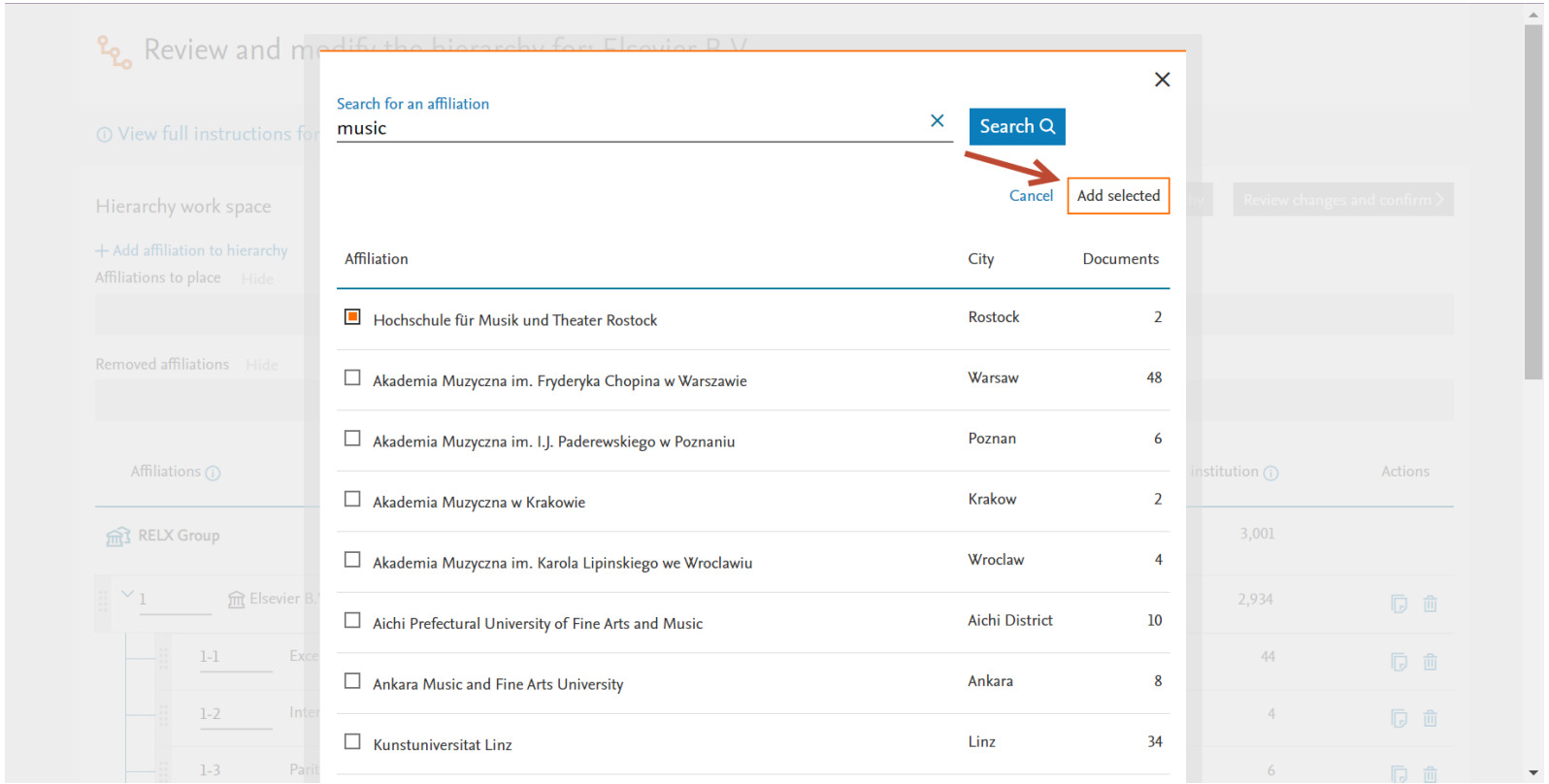
Modify hierarchy: find, add and place an affiliation

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.



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.

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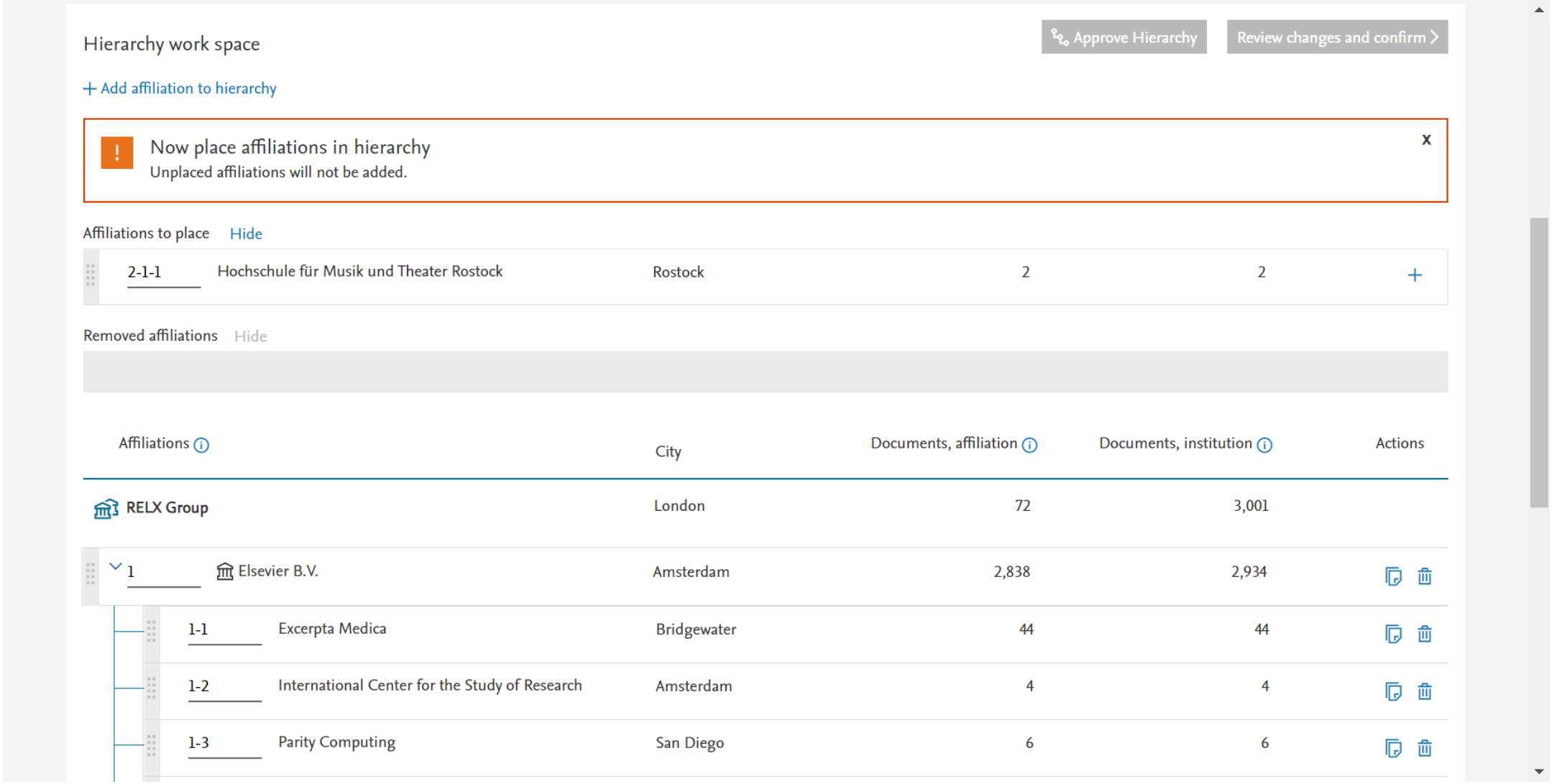
Placing affiliations in the hierarchy



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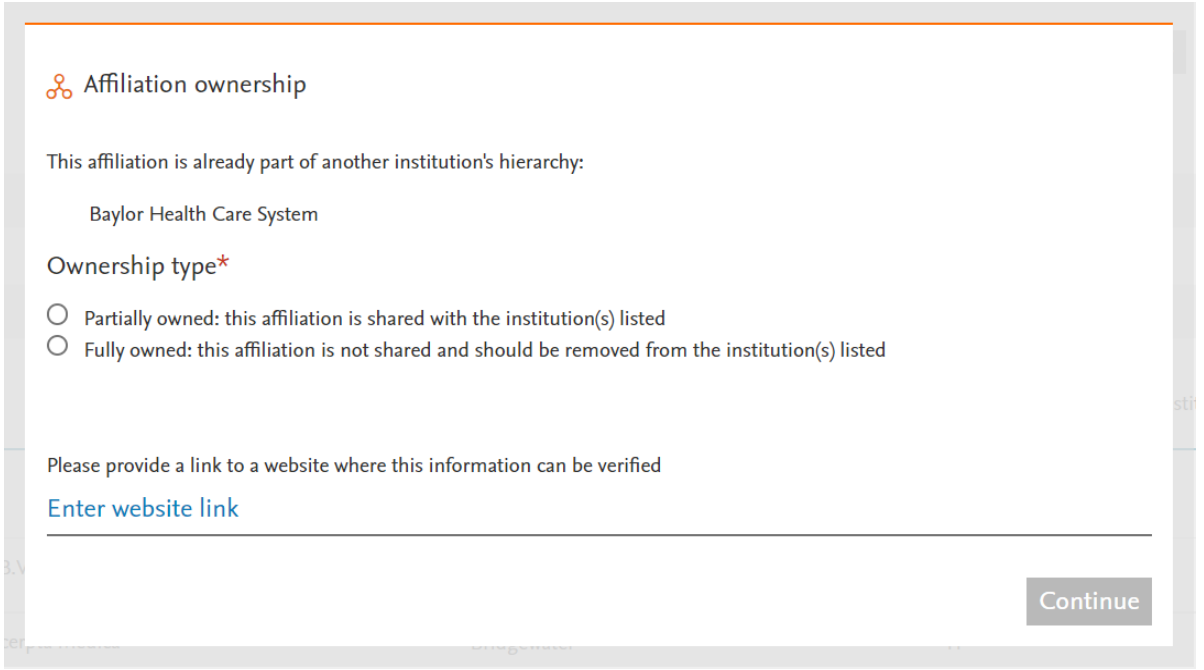
Adding a shared affiliation

- 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.



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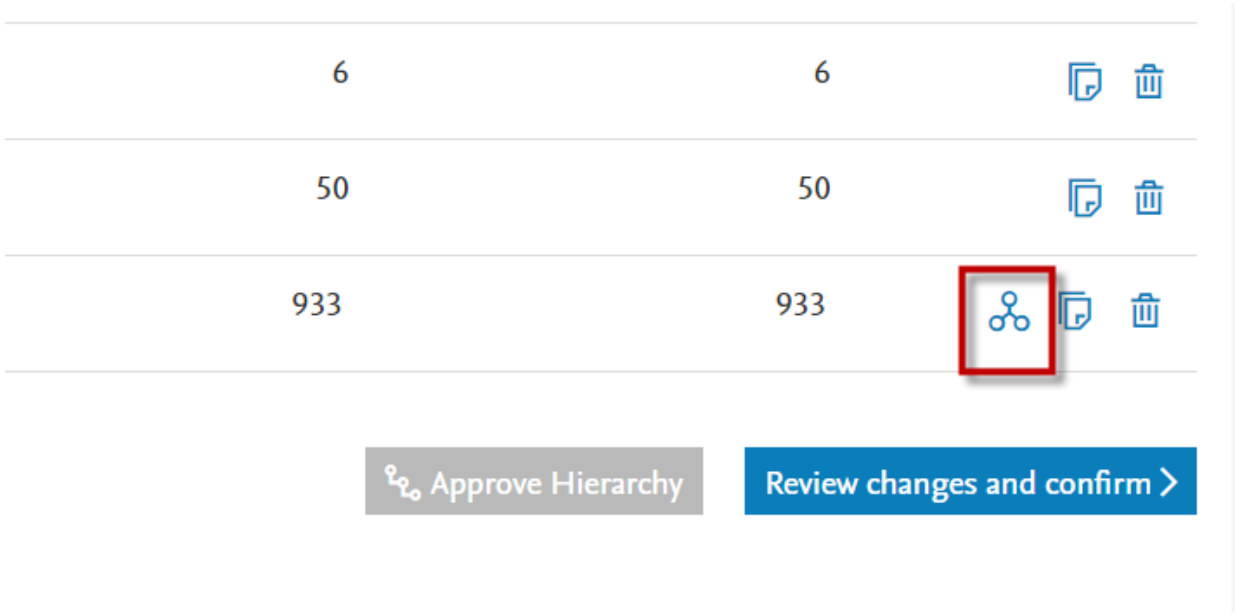
Ownership choices shown in list

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.



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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.

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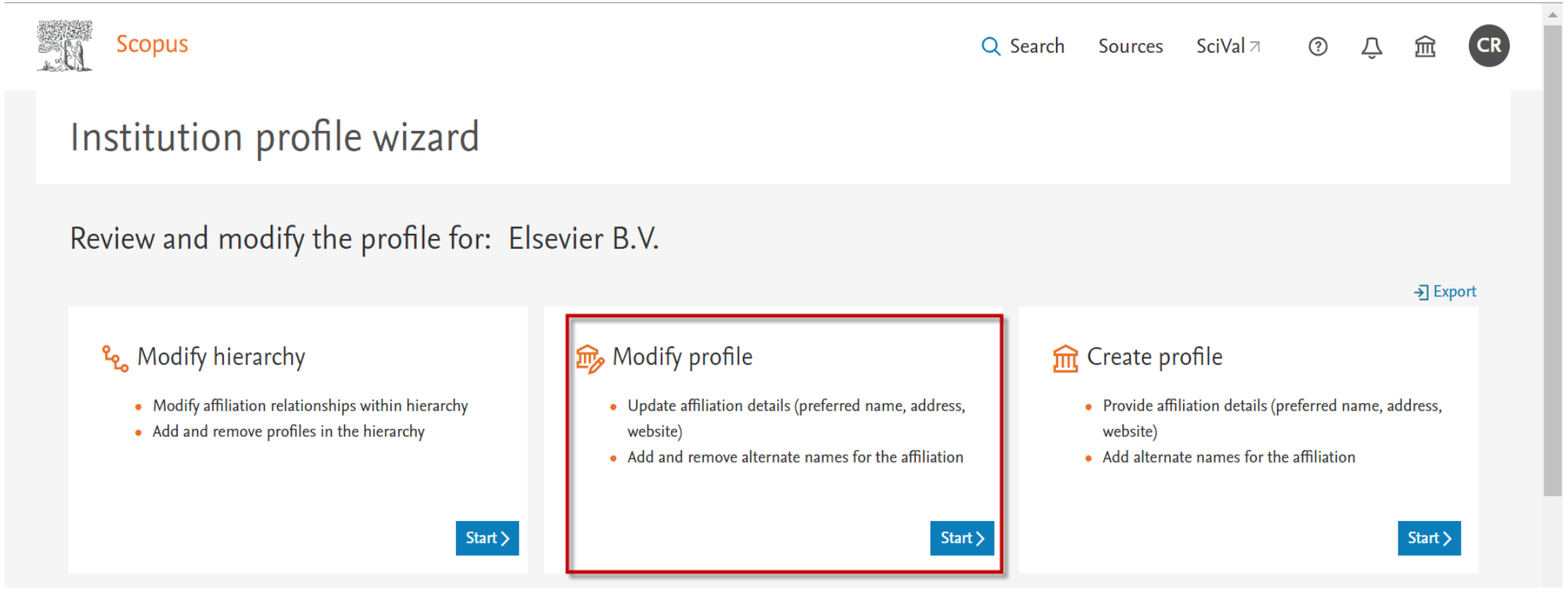
Function 2 – Modify profile

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



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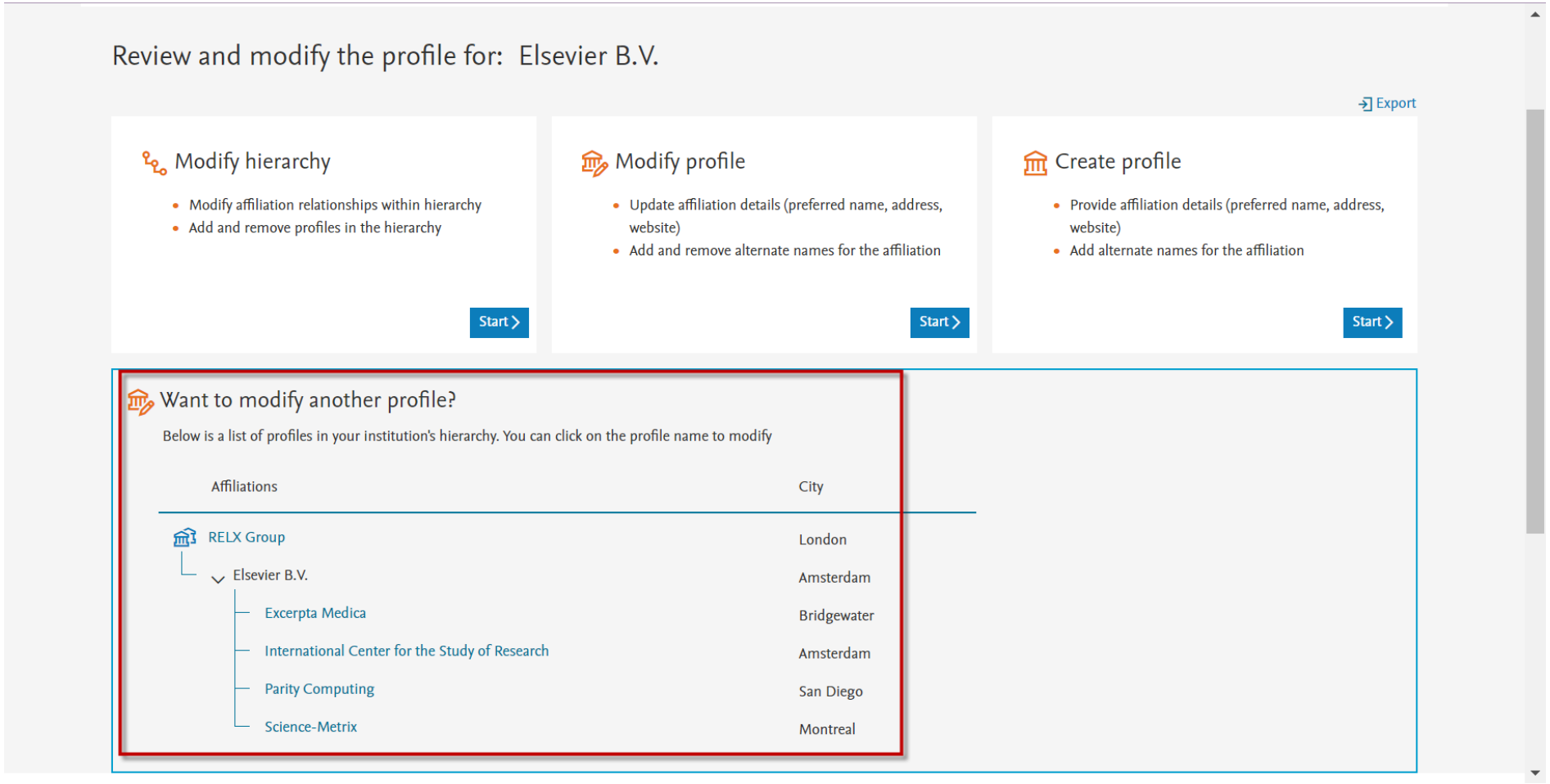
Easier access to other profiles in hierarchy

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



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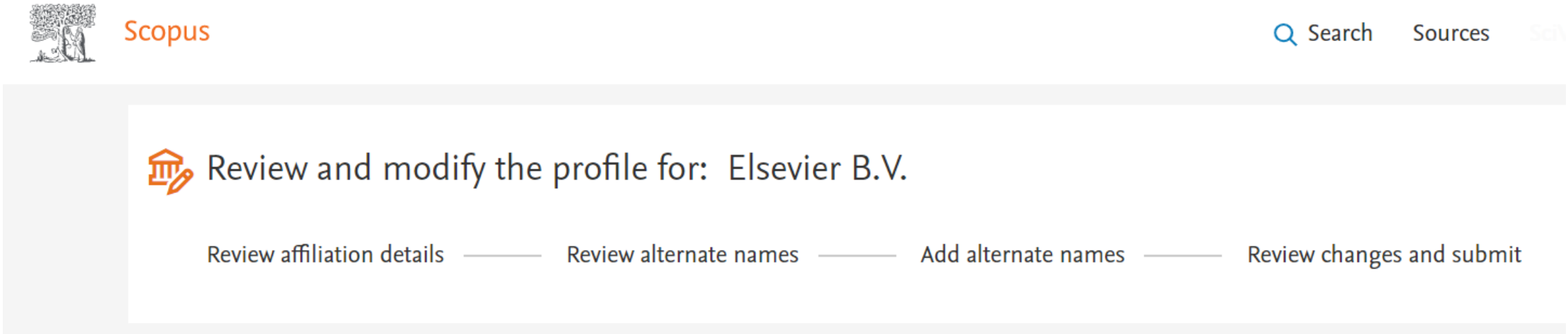
Modify profile

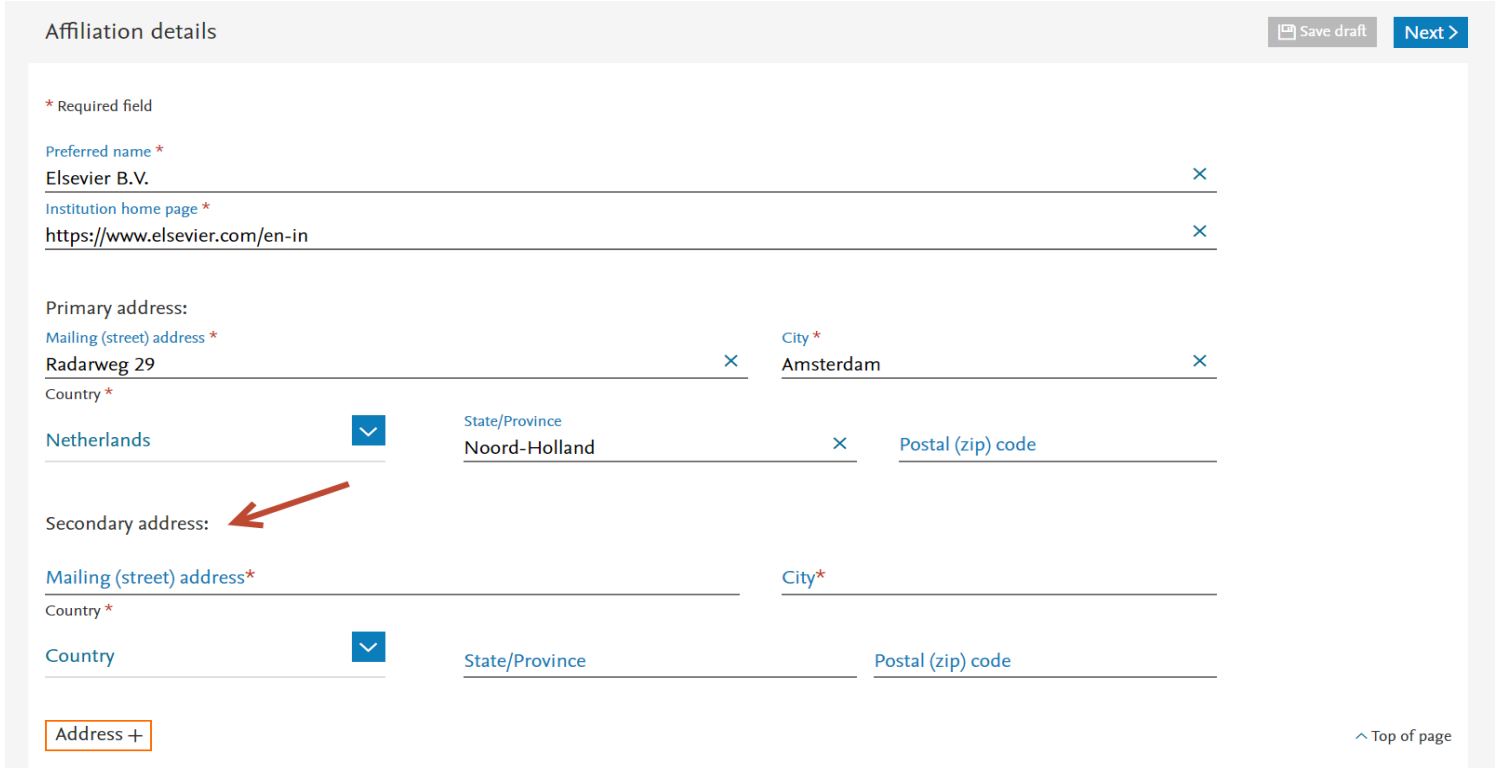


Here you can make changes to the Scopus Institution Profile for any institution for which you have access. There are four possible steps in this process, including adding and removing alternate names.

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

- 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.**



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.

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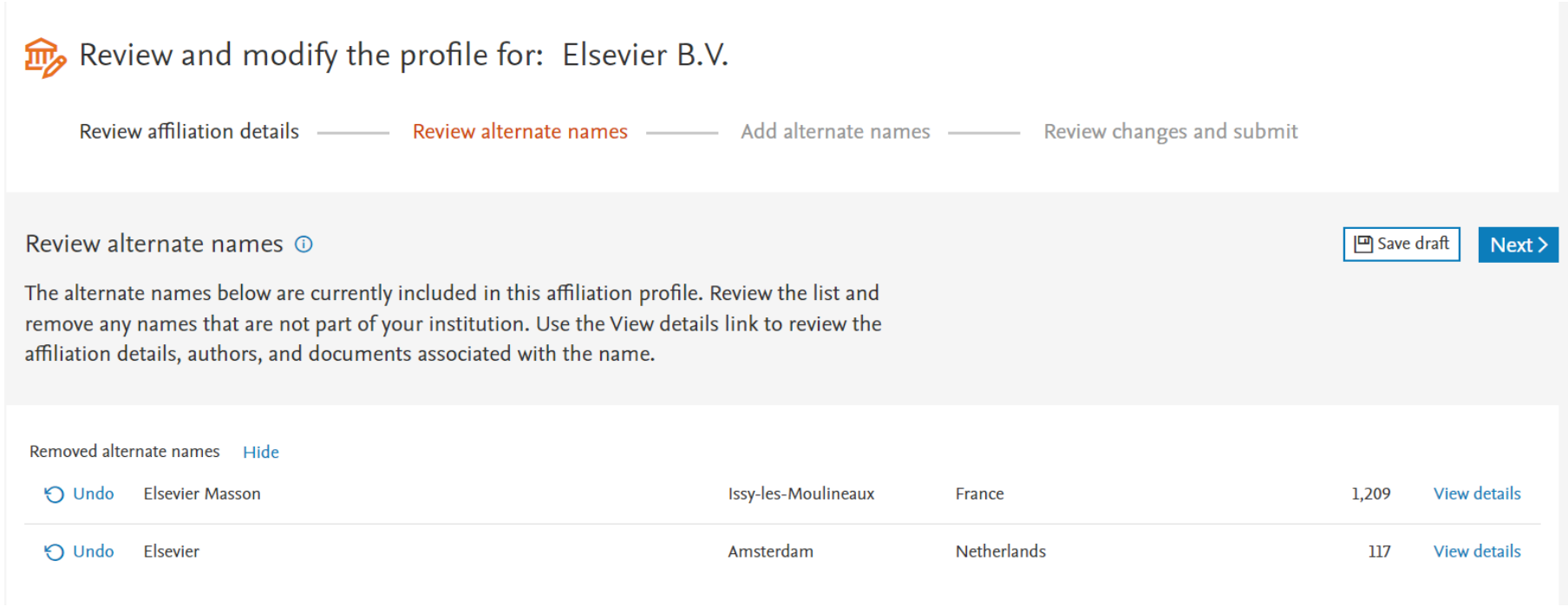
Modify profile: 2. Deleted items appear in work space

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.



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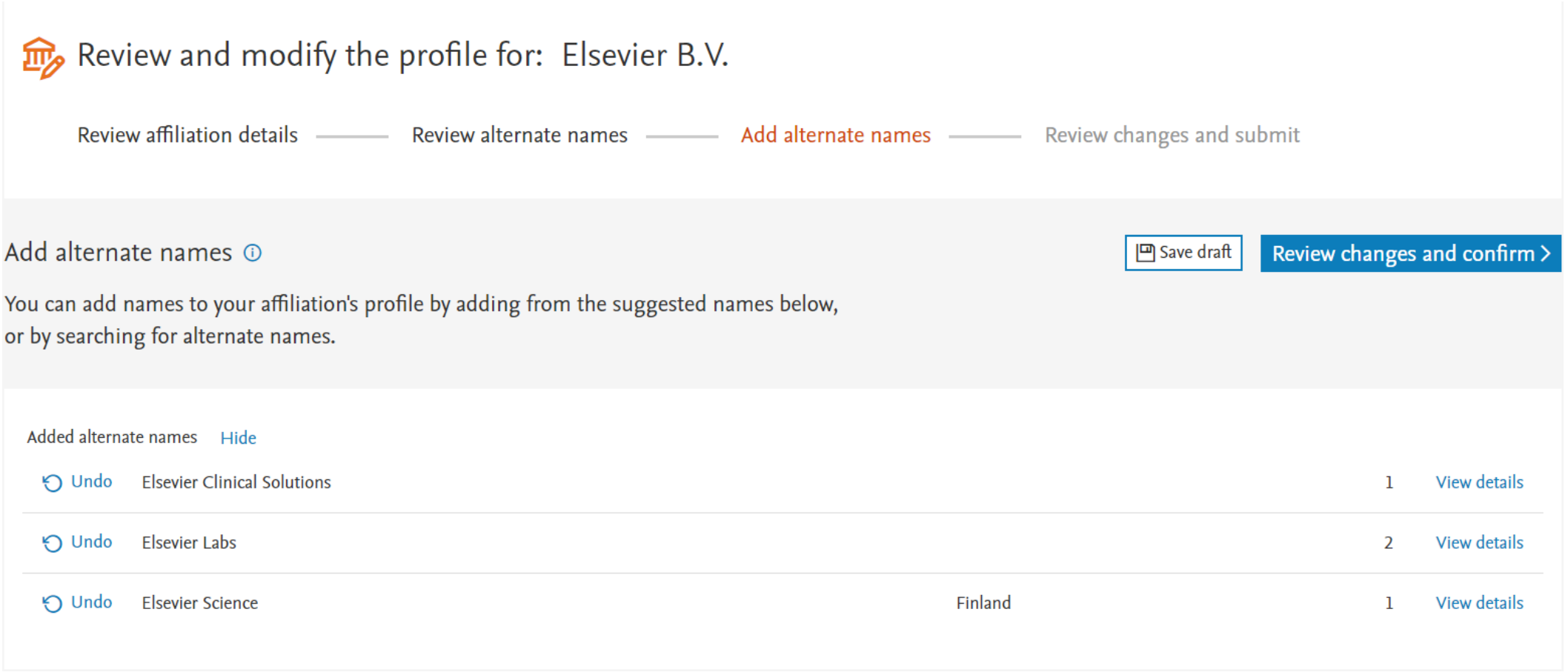
Modify profile: 3. Choose alternate names to add



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.

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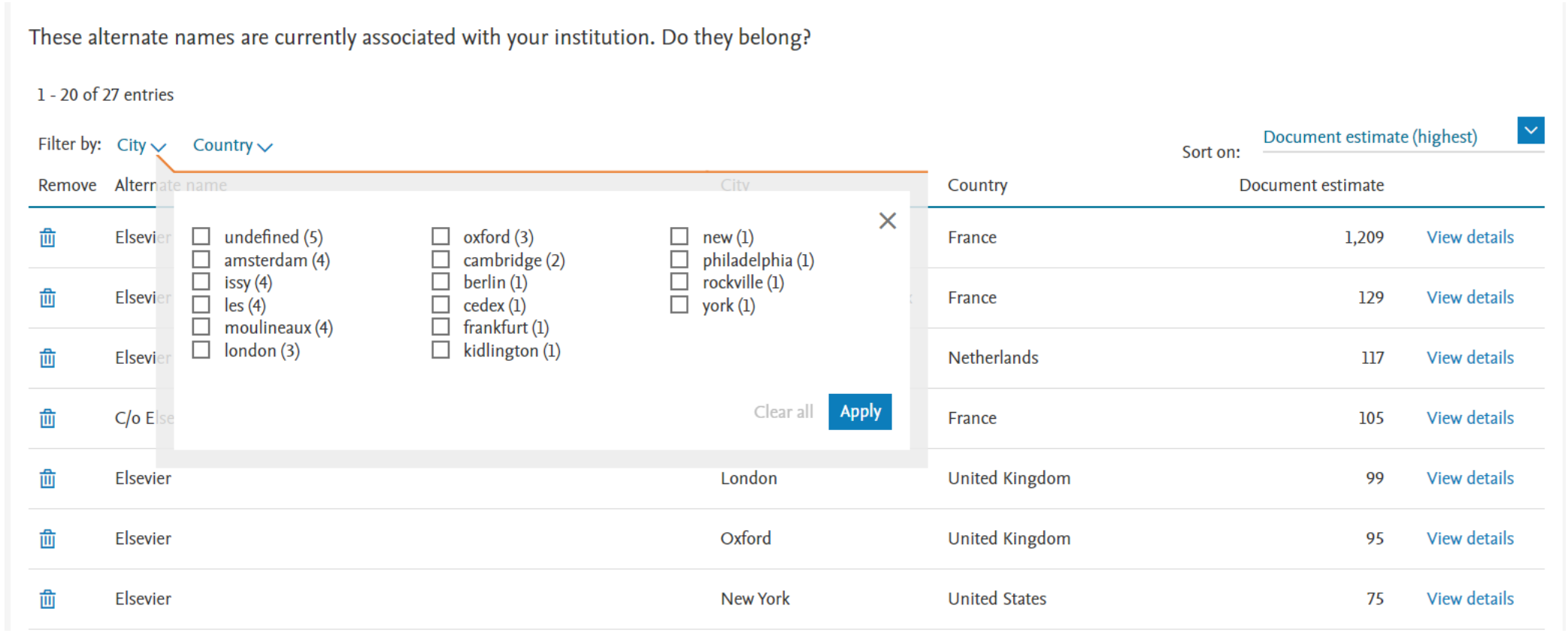
Alternate names 1: filter the list by city or country



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!

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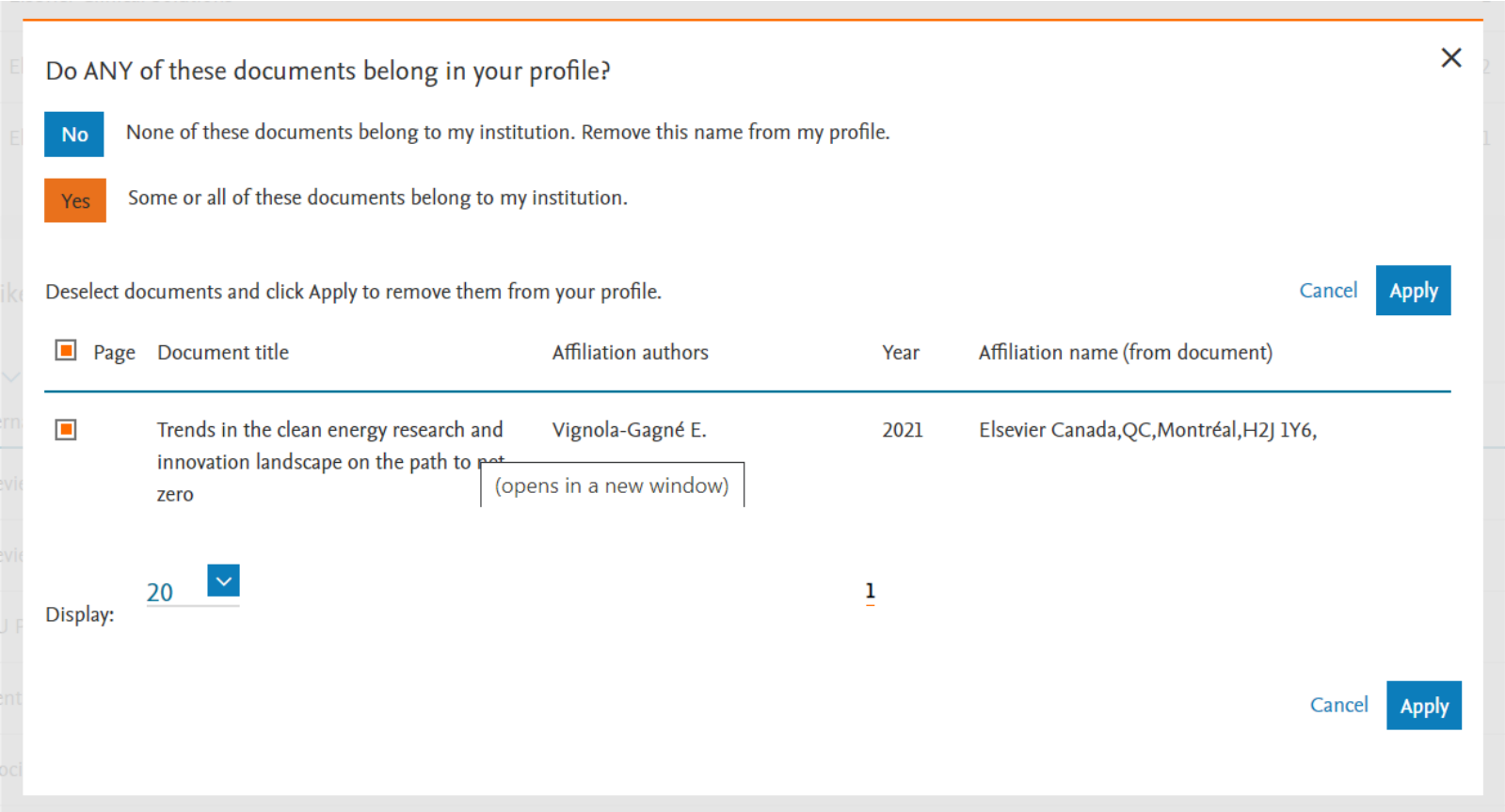
Alternate names: View details and select documents



- 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

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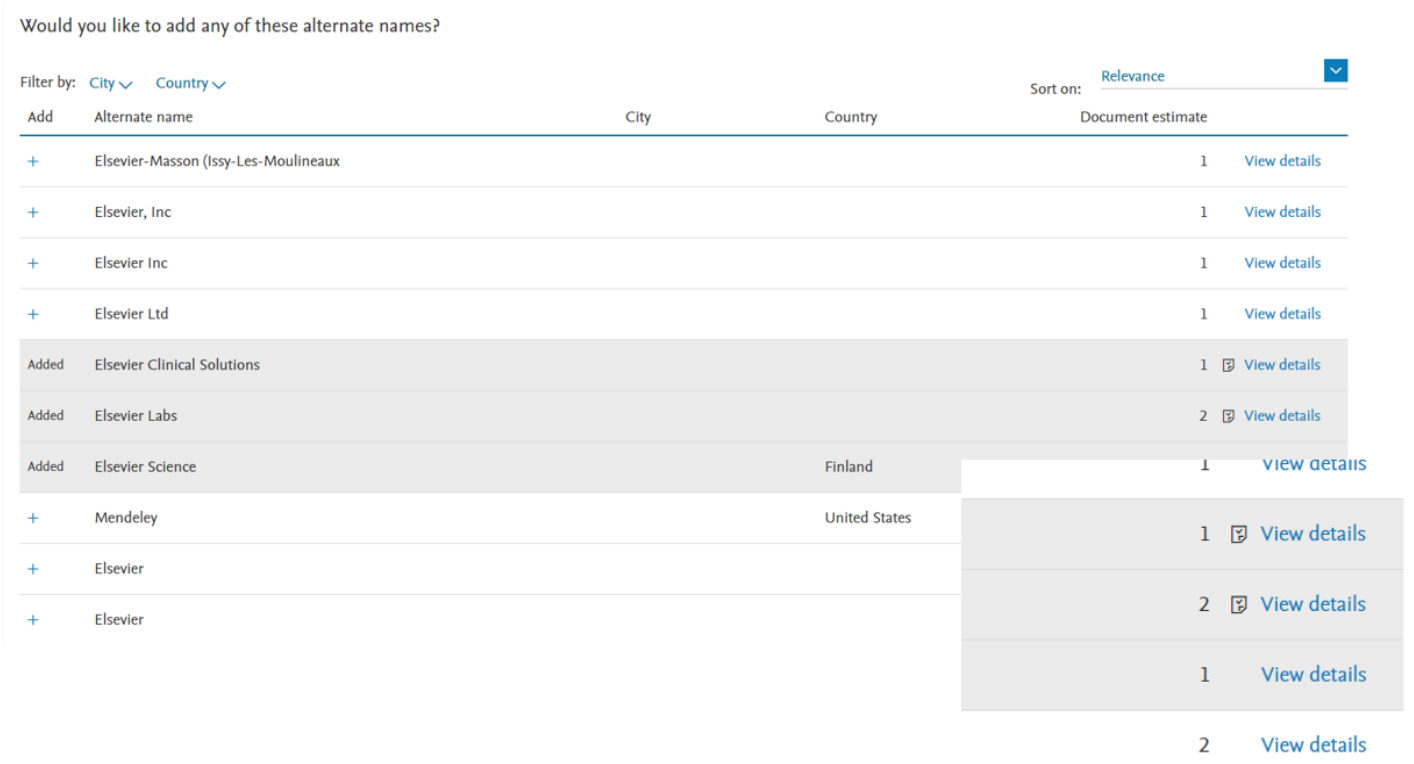
View details: icons help keep track

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).



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.

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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.
- 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)

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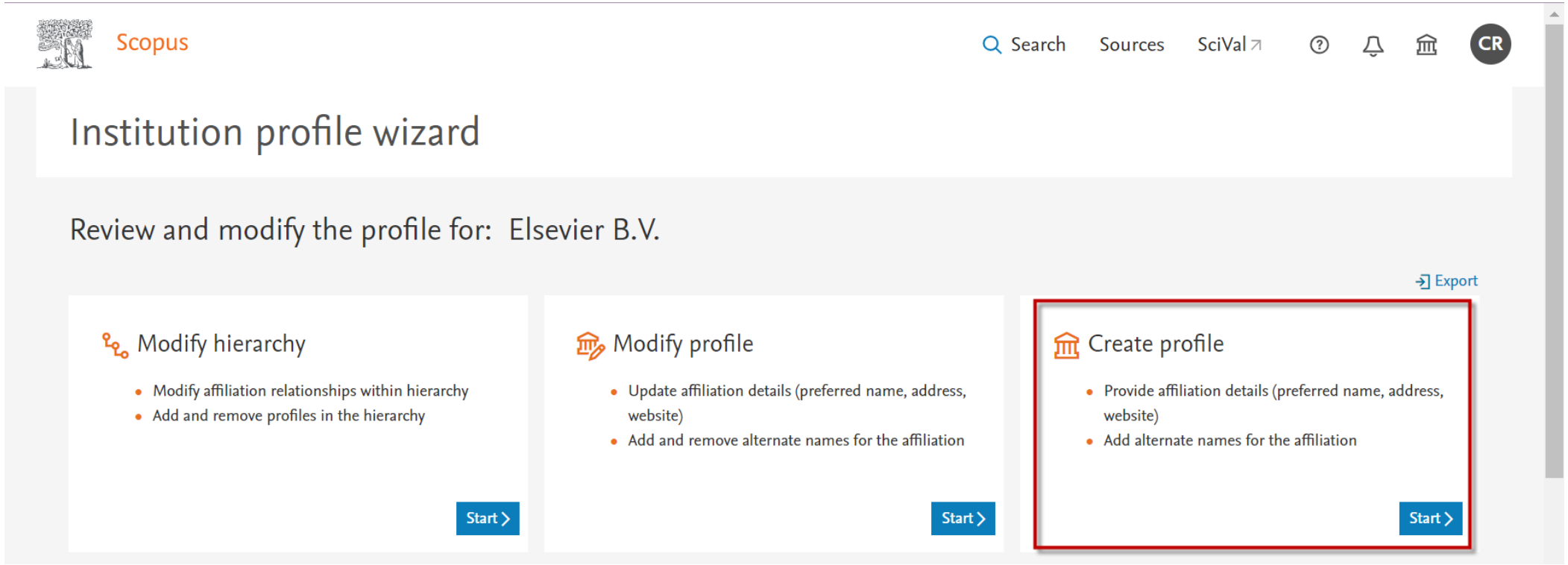
Function 3 – Create profile

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



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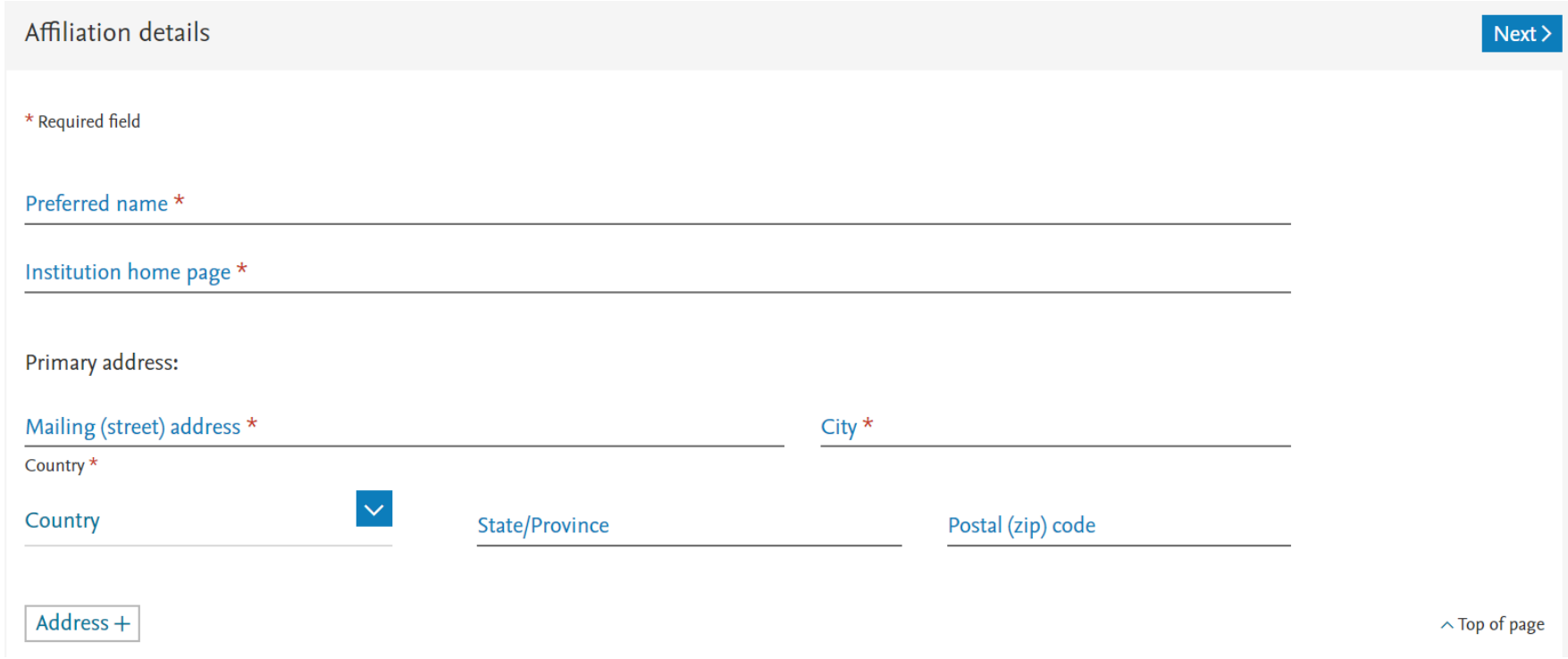
Function 3 – Create profile

1. Provide name, address, etc.



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.

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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**.

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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