



Easily build, maintain and evaluate your
organization's structure in SciVal!

Presentation with screenshots

11th December 2018

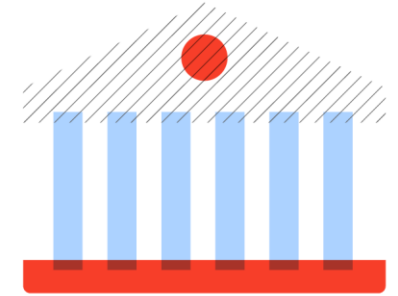
Aileen Christensen, Marketing Manager, SciVal

Chris James, Senior Product Manager, SciVal



Agenda

- What's the value of doing this? Who does this?
- What can SciVal support?
- How can you look at researchers and groups in SciVal?
- Import methods
- Practical demo
- Then what?
- Any Questions



Why?

For research managers and administrators

- Benchmark and compare your researcher's performance against peer groups

For researchers

- Benchmark your performance against your peers to support funding applications and inform collaboration

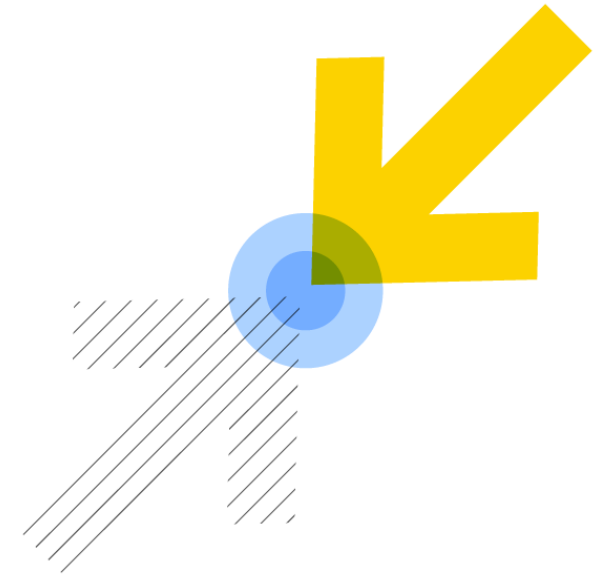
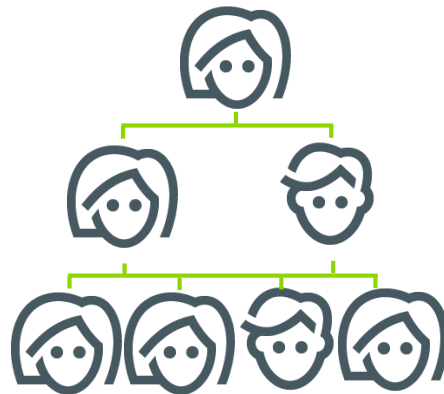


What can SciVal support?

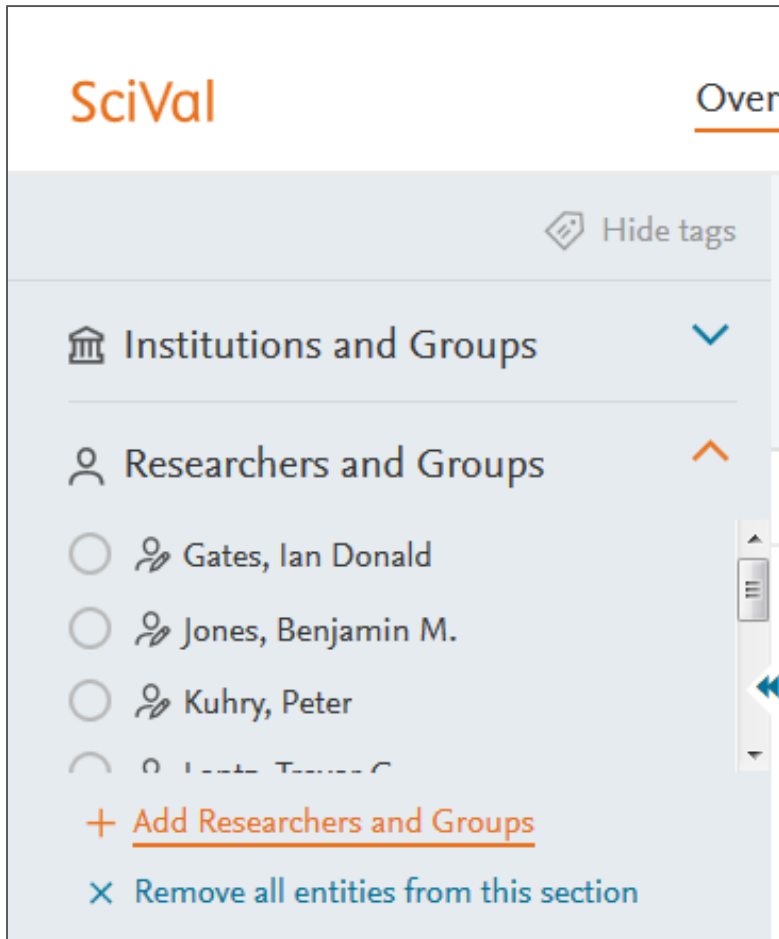
SciVal gives you flexibility when working with researchers

You can look at:

- Individual researchers
- Groups of researchers
 - Real or hypothetical
- Hierarchies
 - Real or hypothetical



How can you view researchers and groups in SciVal?



Three options:

1. Define a new researcher – one at a time
2. Define a new Group of Researchers – using the researchers you've defined
3. Import researchers and groups

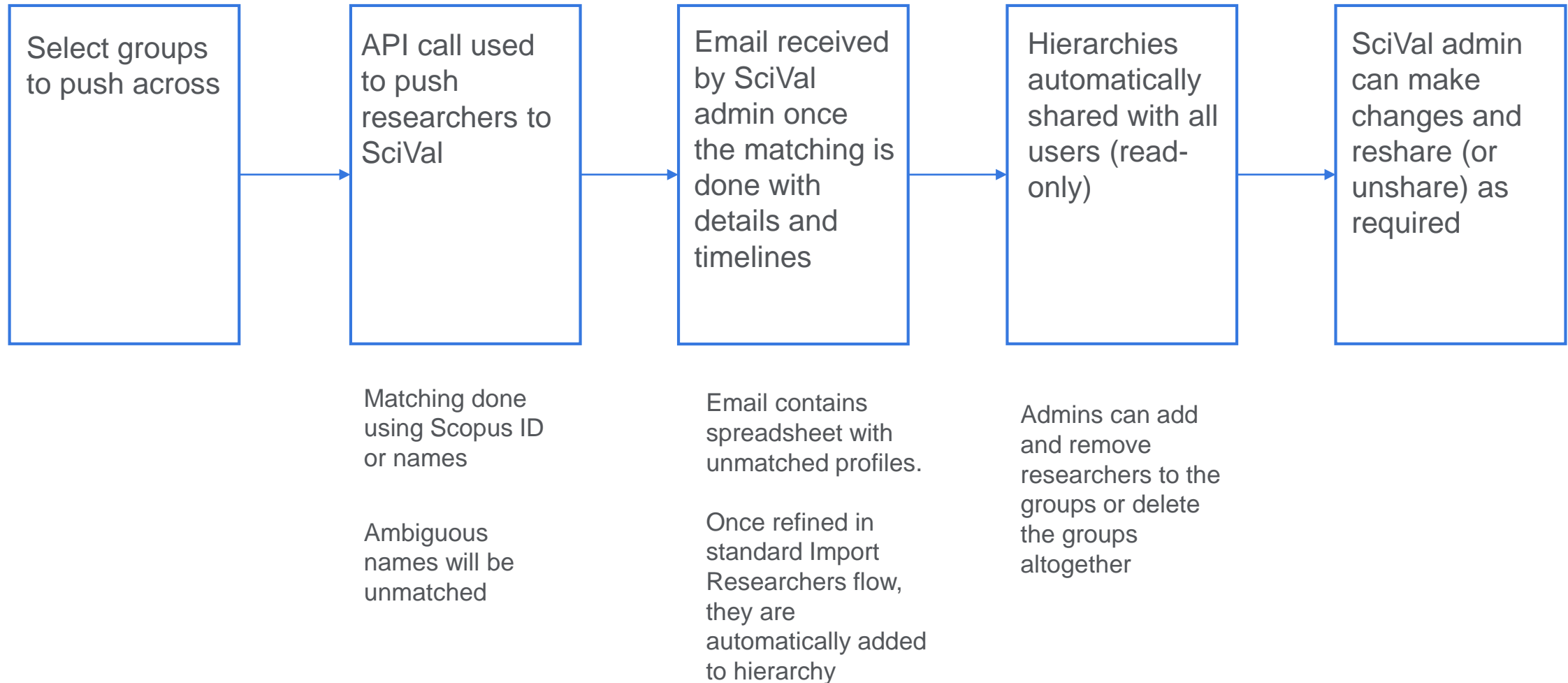
Importing your structure & hierarchies: 2 options

1. Transfer your structure and hierarchies from Pure to SciVal
2. Import your structure and hierarchies into SciVal with a spreadsheet

In both cases, users have a unified starting point for their analyses



Transfer hierarchy structures from Pure to SciVal



Step 1: Activate the functionality in Pure using the Secret Key

The screenshot shows the 'Pure' Athena University Administrator interface. The top navigation bar includes 'test', 'Pure', 'Athena University', a search bar, and a user profile 'chri'. The main navigation menu on the left lists various system settings, with 'Integrations' and 'SciVal Access' highlighted. The main content area is titled 'SciVal Access' and contains three sections: 'SciVal Access Integration' with an 'On' toggle, 'Users with SciVal access' with a dropdown menu set to 'Users with SciVal Access role', and 'SciVal Access Credentials' with input fields for 'Username' (containing 'aalborg') and 'Secret key'. Below these are sections for 'SciVal Organisation export' with a 'SciVal Institutional ID' field and 'Check Institution ID' button, and a 'Check SciVal endpoint connectivity' button. At the bottom are 'Save' and 'Discard changes and refresh settings' buttons.

test Pure Athena University

Editor Master data BFI Dashboard Award management Administrator Usage analytics

Overview
Jobs
System settings
Security
Messages and text resources
Documentation
Terms of agreement
Keywords
Web services
Support
Certificate management
Data retention policy
ORCID
Licensing
Integrations
SciVal Access
Bulk import
Export to Excel
Citations and Impact Factors
Unified Project Model
Full text repository
Storage
Fingerprint
System information
BFI
Award Management
Reporting

SciVal Access

SciVal Access Integration

Enable or Disable SciVal Access Integration

SciVal Access Integration

On

Users with SciVal access

Choose if all users or only users with the "SciVal Access" role should have access to SciVal.

Users with SciVal access

Users with SciVal Access role

SciVal Access Credentials

Username to use when calling the SciVal web services. The key used when calling the SciVal web services. If you do not have your credentials ready, please contact the SciVal support.

Username *

aalborg

Secret key *

SciVal Organisation export

Your SciVal Institutional ID is needed to send your organisational structure to SciVal, please enter it below.
You can use the "Check institution ID" button to make sure, you entered the correct ID, it will display the institution's name for the entered ID stored in SciVal. If your SciVal Institutional ID is unknown to you, you can contact [SciVal support](#) to get help.

SciVal Institutional ID

Check Institution ID

In order to retrieve the organisation structure, SciVal uses the web service API. You can check the connectivity, by pressing the "Check SciVal connectivity" button, to make sure SciVal can retrieve your organisational structure.

Check SciVal endpoint connectivity

Save Discard changes and refresh settings

Step 2: Select the hierarchy in Pure

The screenshot displays the 'Pure' Athena University interface. The top navigation bar includes 'test', 'Pure', 'Athena University', and tabs for 'Editor', 'Master data', 'BFI', 'Dashboard', 'Award management', 'Administrator', and 'Usage analytics'. The left sidebar contains a 'Master data overview' menu with categories like Users, External persons, External organisations, Author collaborations, Journals, Publishers, Conference series, Classification schemes, File handles, Events, and Organisations units. The 'Organisations units' category is expanded, showing 'Editable' (574), 'Research performance indicators', 'Duplicate names' (10), and 'Duplicate IDs' (126). The main content area shows a list of 574 results, all of which are selected. The list includes 'Athena University' (Institution), 'Athena University Library' (Administrative Department), 'The Faculty of Engineering and Science' (Faculty), 'The Faculty of Engineering and Science (ENG)' (Former organisational unit), 'The Faculty of Engineering and Science (TECH)' (Former organisational unit), 'Department of Architecture & Design' (Former organisational unit), 'Department of Media Technology' (Former organisational unit), 'The Faculty of Humanities' (Faculty), 'The Faculty of Medicine' (Faculty), 'The Faculty of Social Sciences' (Faculty), 'The Technical Faculty of IT and Design' (Faculty), 'Arctic' (Research Centre), and 'VBN.persons.unidentified' (Administrative Department). A yellow banner at the top of the list states 'All 574 items in the list are selected. Select none or Cancel' with buttons for 'Bulk edit' and 'Send to SciVal'. A modal dialog box titled 'Send to SciVal' is open, displaying the message: 'The selected organizations will be transferred to SciVal. You will be notified via email about the progress within the next 24 hours.' The dialog has 'Close' and 'Transfer IDs to SciVal' buttons.

test Pure Athena University

Editor Master data BFI Dashboard Award management Administrator Usage analytics

Master data overview

Users

External persons

External organisations

Author collaborations

Journals

Publishers

Conference series

Classification schemes

File handles

Events

Organisations units

Editable 574

Research performance indicators

Duplicate names 10

Duplicate IDs 126

Persons

Education structure

Funding opportunities

Report definitions

Try the new Pure Report Technology Preview

Open Pure Report

My content

All 574 items in the list are selected. Select none or Cancel Bulk edit Send to SciVal

574 results

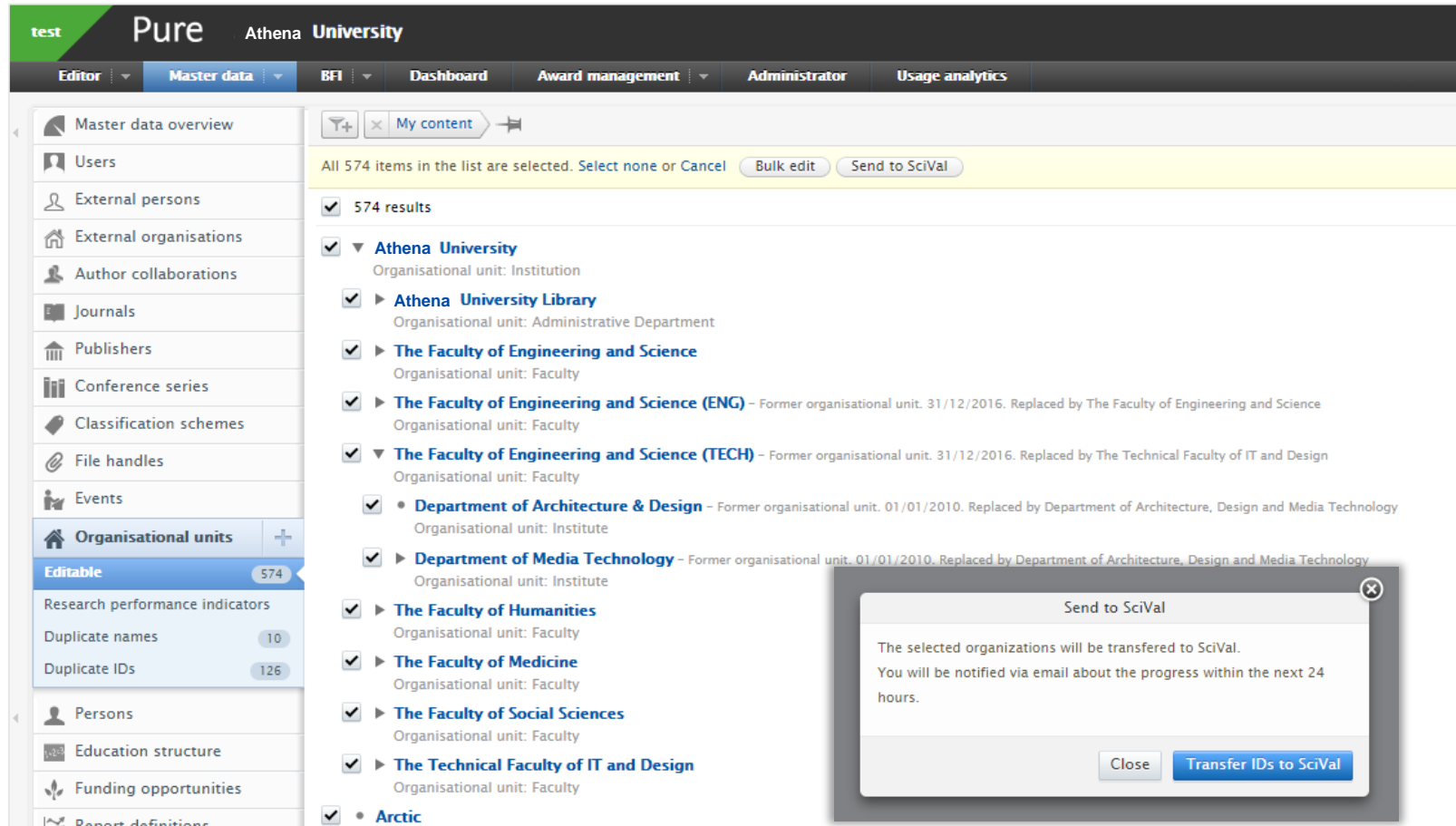
- ☒ Athena University
Organisational unit: Institution
- ☒ Athena University Library
Organisational unit: Administrative Department
- ☒ The Faculty of Engineering and Science
Organisational unit: Faculty
- ☒ The Faculty of Engineering and Science (ENG) - Former organisational unit. 31/12/2016. Replaced by The Faculty of Engineering and Science
Organisational unit: Faculty
- ☒ The Faculty of Engineering and Science (TECH) - Former organisational unit. 31/12/2016. Replaced by The Technical Faculty of IT and Design
Organisational unit: Faculty
- ☒ Department of Architecture & Design - Former organisational unit. 01/01/2010. Replaced by Department of Architecture, Design and Media Technology
Organisational unit: Institute
- ☒ Department of Media Technology - Former organisational unit. 01/01/2010. Replaced by Department of Architecture, Design and Media Technology
Organisational unit: Institute
- ☒ The Faculty of Humanities
Organisational unit: Faculty
- ☒ The Faculty of Medicine
Organisational unit: Faculty
- ☒ The Faculty of Social Sciences
Organisational unit: Faculty
- ☒ The Technical Faculty of IT and Design
Organisational unit: Faculty
- ☒ Arctic
Organisational unit: Research Centre
- ☒ VBN.persons.unidentified
Organisational unit: Administrative Department

Send to SciVal

The selected organizations will be transferred to SciVal.
You will be notified via email about the progress within the next 24 hours.

Close Transfer IDs to SciVal

Step 2: Select the hierarchy in Pure



If in the Pure hierarchy transfer there are unmatched profiles, the SciVal admin will receive an email with their details

- They need to go through the standard Import Researcher process and profiles will automatically added to the correct hierarchy groups

Import Researchers and hierarchies using a spreadsheet

Data used to identify researcher

Data used to put the researcher in a hierarchy

| Author | Name variants | Affiliation | EIDs | DOIs | PMIDs | Title | ISSN/Volume/Issue/Pa | Scopus Author ID | ORCID | Level 1 | Level 2 | Level 3 | Level 4 | Level 5 | Level 6 | L |
|------------------|---------------|-------------------------|------------------|------|-------|--|---|------------------|---------------------|-------------------------|----------------------|----------|---------|---------|---------|---|
| Colledge, Lisa | Colledge, L. | Oxford University | | | | Project Snowball - Sharing data for cross- | 18770509/33//297-300 1389130/92/2/367- | | | Top Researchers | | | | | | |
| Kamalski, Judith | Kamalski, J | Utrecht University | 2-s2.0-800517442 | | | | | | | Top Researchers | | | | | | |
| Heeman, Frans C. | | | | | | | | 6505857281 | | | | | | | | |
| Neal, David | | University of Cambridge | | | | Synthetic lethality between androgen | | | | University of Cambridge | Department of Cancer | Medicine | | | | |
| Darroch, Peter | | | | | | | | | 0000-0002-0852-8569 | Top Researchers | | | | | | |

- We've split the spreadsheet so it's clear what data is used to identify the researchers and what's used to put them in a hierarchy
- Tips:
 1. If a valid Scopus Author ID or ORCID is present, all other data is ignored
 2. Multiple valid Scopus Author IDs given for a researcher will result in a merge request to Scopus (if not already done)
 3. The order of the columns does not matter. The spelling does!
 4. If no affiliation is given, the home institution of the user will be used
 5. In most cases, only a researcher with a valid Scopus author ID or ORCID provided will result in a direct match, unless more specific information is given

Live demo walkthrough

1. Prepare my import spreadsheet
2. Import first part of my hierarchy
3. Add additional researchers to my new hierarchy
4. Export the complete hierarchy (master spreadsheet) and make changes
5. Synchronize the master spreadsheet with the existing hierarchy in SciVal



= Tip!

Parts 1&2

1. Prepare my import spreadsheet

- Every single researchers in SciVal links back to a Scopus author ID
- Ultimately if you don't provide a Scopus author ID for a researcher, the refinement process in SciVal helps you find one
- More relevant details help to make a exact match to a Scopus author ID



- If you provide multiple valid Scopus author IDs for a researcher, SciVal sends a merge request to Scopus - this is manually verified and can save you time



- If you provide multiple valid Scopus author IDs for a researcher, but they have already been merged, we use them to link to the primary author ID
 - If you're not sure which ID is the primary one, submit them all





- Keep it manageable – **no more than 1,000 researchers** per spreadsheet (smaller is recommended to get started)


2. Import first part of my hierarchy




Import new researchers and hierarchy

 Researchers and Groups

☐  Athena University

☐  Bobier, William R.

☐  Callender, Murchison G.E.


Find existing researcher or group

Q Advanced search

+ Define a new Researcher

+ Import Researchers

+ Define a new Group of Researchers



Import Researchers

1. Upload file or paste IDs

2. Refine authors

3. Organize and save

Import Researchers

[? Need an example?](#)

Here you can import a list of Scopus authors into SciVal.
Please upload a text file containing Scopus author metadata.

Drop file here or click to upload
(CSV, XLS, JSON, or text file)

Paste IDs

Alternatively, you can paste a list of Scopus author IDs or ORCID IDs in this field
(one ID per row, max. 1,000).

Next step >

[? Learn about the matching algorithm](#) X

Matching researchers with Scopus author profiles

Matched confidence used as default (used to be most published match)

Import Researchers

[? Learn about the matching algorithm](#) ✕

1. Upload file or paste IDs

2. Refine authors

3. Organize and save

33 matched authors

will be directly imported into SciVal.

[? Learn more](#)

| Author ↑ | Publications |
|---------------------------|--------------|
| Bobier, William R. | 73 |
| Callender, Murchison G.E. | 26 |
| Choh, Vivian | 30 |
| Chou, B. Ralph | 33 |
| Christian, Lisa W.T. | 4 |
| Cullen, Anthony P. | 74 |

4 suggested authors

can be imported into SciVal after refinement or by dragging the best matched profile to the left.

[? Learn more & export names](#)

| Author | Best match ↓ |
|-----------------------------------|---------------------------|
| Nelson, Peter | |
| Morris, Peter E | |
| Jones, Davy | |
| Lakshminarayanan, Vasudevan (Dr.) | |

🔗 87.8%

> Import most relevant profile

🔗

> Refine all suggested profiles

2 authors not found

and will not be imported into SciVal.

[? Learn more & export names](#)

| Author ↑ |
|-----------------------|
| Abuleil, Dania |
| Hadley, Ken |

< Previous step

Organize groups >

Refine authors



1. Select
2. Validate publications (optional)
3. Save Researcher

Select author name variant(s) that refer to the Researcher

| <input type="checkbox"/> Author | Match Confidence | Publications | Subject Area | Affiliation | Country |
|--|------------------|--------------|---|--|------------------|
| <input type="checkbox"/> Morris, Peter E. Morris, P. E. Morris, Peter Morris, P. Show recent publications | 100.0% | 107 | Medicine, Nursing, Pharmacology, Toxicology and Pharmaceutics, Neuroscience, Biochemistry, Genetics and Molecular Biology, Immunology and Microbiology, Health Professions, Environmental Science, Agricultural and Biological Sciences, Multidisciplinary | University of Kentucky | United States |
| <input type="checkbox"/> Morris, Peter E. Show recent publications | 63.4% | 1 | Medicine | University of Kentucky College of Medicine | United States |

Directly go to Save Researcher >

Validate publications (optional) >

The new group is created

Import Researchers

1. Upload file or paste IDs

2. Refine authors

3. Organize and save

Entities to be imported

Type to filter

All

Lakshminarayanan, Vasudevan

Jones, David R.B.

Morris, Peter E.

Nelson, Peter T.

Stanberry, Andre

Simpson, Trefford Lee

McCulloch, Daphne Lynne

Leat, Susan J.

Jones, Deborah A.

Structures to be imported

Type to filter

Tags

> Top University

+ Add group

Athena University

+ Add group

Faculty of Optometry

+ Add group

Bobier, William R.

Callender, Murchison G.E.

Chou, B. Ralph

O. Christian, Lisa M.T.

< Previous step

Save and finish >

And researchers can be moved to new or existing groups

Structures to be imported

Type to filter

Tags

>

Top University

+ Add group

▼

Athena University

+ Add group

Bobier, William R.

×

▼

Faculty of Optometry

+ Add group

Callender, Murchison G.E.

Chou, B. Ralph

New hierarchy is visible in My SciVal



SciVal

Overview

Benchmarking

Collaboration

Trends

Reporting

My SciVal

Scopus ↗



Hide tags

Institutions and Groups

Researchers and Groups show ▾

Publication Sets

Countries and Groups

Topics and Research Areas

Researchers and Groups



Faculty of Quantum Computing and 2 other groups and 36 researchers are now available to use in SciVal. [See entities](#)



Add to panel

Tags ▾

Share

Edit

Delete

Export ▾

Add new ▾



Name

Tags



Athena University

Added



Faculty of Optometry

Added



Faculty of Quantum Computing

Added



Bobier, William R.

Added



Top University

ELSEVIER

[About SciVal](#) ↗

[Terms and conditions](#) ↗

[Privacy statement](#) ↗

[Contact](#)

We use cookies to help provide and enhance our service and tailor content. By continuing you agree to the [use of cookies](#).

© 2018 Elsevier B.V. ↗ All rights reserved. SciVal, RELX Group and the RE symbol are trade marks of RELX Intellectual Properties SA, used under license.

RELX Group™

Settings

Part 3

3. Add additional researchers to my new hierarchy

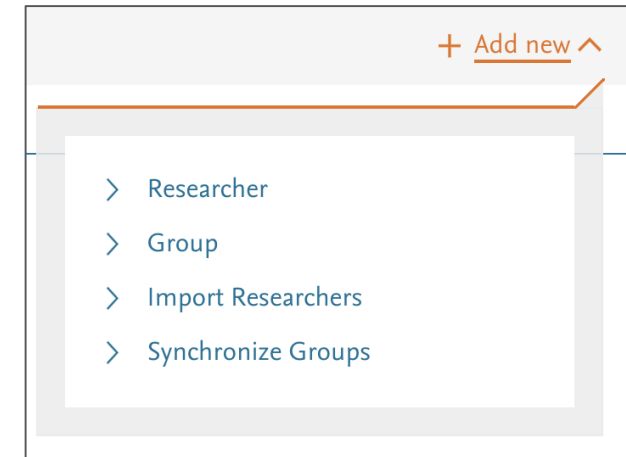
- Only to the 2 groups I've just created
- SciVal looks at the level name to see if it already exists – check your spelling!



| Level 1 | Level 2 | Level 3 |
|-------------------|------------------------------|---------|
| Athena University | Faculty of Quantum Computing | |
| Athena University | Faculty of Optometry | |



- You can also add researchers to new groups (the new groups will be created)
- Importing researchers will only add researchers (never remove)
 - If they already exist in the structure, nothing happens to that researcher



Import new researchers

If the groups already exists, the researchers are automatically added to them

Import Researchers

1. Upload file or paste IDs

2. Refine authors

3. Organize and save

Entities to be imported

Type to filter

All

Thompson, Benjamin

Khan, Shamroze

Irving, Elizabeth

Spafford, Marlee M.

Sorbara, Luigina Gina

Prokopich, C. Lisa

Labreche, Tammy

Faculty of Optometry

Faculty of Quantum Computing

Structures to be imported

Type to filter

Tags

☐

Stanberry, Andre

☐

Labreche, Tammy

☐

Prokopich, C. Lisa

☐

Sorbara, Luigina Gina

☐

Spafford, Marlee M.

☐

Faculty of Optometry

+ Add group

☐☐☐

< Previous step

Save and finish >

Part 4&5

4. Export the complete hierarchy (master spreadsheet) and make changes



- You then have Scopus author IDs per researcher! – this makes the sync process faster

4. Synchronize the master spreadsheet with the existing hierarchy in SciVal



- Must be less than 1,000 researchers per spreadsheet



- Ensure the level is complete in the spreadsheet otherwise your hierarchy will be wrong
 - SciVal will compare the levels (hierarchy structure) in the spreadsheet with the existing one in SciVal. If a level is mentioned once in your spreadsheet SciVal will use that to overwrite the one in SciVal (if it exists)
 - If the hierarchy is new, it will be added



- Researchers are never deleted during this process, just removed from the hierarchy

Export your current hierarchy



SciVal

Overview

Benchmarking

Collaboration

Trends

Reporting

My SciVal

Scopus ↗



Hide tags

Researchers and Groups

Type to filter



All entities you can use in SciVal



Filter by tags



Add to panel

Tags

Share

Edit

Delete

Export

+ Add new



Name

Tags



Athena University



Top University

Export researchers to a spreadsheet file (CSV)

Export researchers to a spreadsheet file (XLS)

Export includes all Scopus Author IDs

| Author | Scopus Author ID | Level 1 | Level 2 | Level 3 | Level 4 | Level 5 | Level 6 |
|----------------------|------------------|-------------------|------------------------------|---------|---------|---------|---------|
| Woo, Lisa | 8042105850 | Athena University | Faculty of Optometry | | | | |
| Woo, Stanley Y. | 8405576004 | Athena University | Faculty of Optometry | | | | |
| CMoM, Vivian | 31971659760 | Athena University | Faculty of Optometry | | | | |
| CMou, B. Ralpm | 44300491560 | Athena University | Faculty of Optometry | | | | |
| CMristian, Lisa W.T. | 8404930030 | Athena University | Faculty of Optometry | | | | |
| Flanagan, JoMn G. | 65497049280 | Athena University | Faculty of Optometry | | | | |
| Furtado, Nadine M. | 28173350760 | Athena University | Faculty of Quantum Computing | | | | |
| Maines, Lacey | 8405668030 | Athena University | Faculty of Quantum Computing | | | | |
| Mildebrand, Jenna M. | 7924614547 | Athena University | Faculty of Optometry | | | | |
| Mileeto, Denise | 65882871840 | Athena University | Faculty of Optometry | | | | |
| Movis, Jeffery K. | 8522382317 | Athena University | Faculty of Optometry | | | | |
| Mudson, CMris J.W. | 44305434600 | Athena University | Faculty of Optometry | | | | |
| Mutcmings, Natalie | 8406617455 | Athena University | Faculty of Optometry | | | | |
| Irving, ElizabetM | 20332677000 | Athena University | Faculty of Optometry | | | | |
| Jones, David R.B. | 8883020136 | Athena University | Faculty of Optometry | | | | |
| Jones, DeboraM A. | 8643046890 | Athena University | Faculty of Optometry | | | | |

Synchronize your master spreadsheet in My SciVal

Researchers and Groups

Type to filter

All entities you can use in SciVal

Filter by tags

Add to panel

Tags

Share

Edit

Delete

Export

+ Add new

| <input type="checkbox"/> | Name | Tags |
|--|--|------------------------------|
| <div><div><div></div></div><div><div><div></div></div></div></div> | <div><div><div></div></div><div><div><div></div></div></div><div>Athena University</div></div> | |
| <div><div><div></div></div><div><div><div></div></div></div></div> | <div><div><div></div></div><div><div><div></div></div></div><div>> Faculty of Optometry</div></div> | Faculty of Optometry |
| <div><div><div></div></div><div><div><div></div></div></div></div> | <div><div><div></div></div><div><div><div></div></div></div><div>> Faculty of Quantum Computing</div></div> | Faculty of Quantum Computing |

> Researcher

> Group

> Import Researchers

> Synchronize Groups

Synchronize your master spreadsheet

Synchronize Groups



1. Upload file

2. Organize and save

Import Researchers and Groups

[? Need an example?](#)

Upload a text file containing Scopus author profiles and groups, and synchronize the data with your existing Researchers and Groups in My SciVal.

Drop file here or click to upload
(CSV, XLS, JSON, or text file)

See the changes

Synchronize Groups



1. Upload file

2. Organize and save

Verify changes

Type to filter



Edit



Tags



☐ Newly added ☐ Will be removed

☐ Murphy, Paul J.

☐ Flanagan, John G.

☐ Faculty of Optometry

+ Add group

☐ Woo, Stanley Y.

☐ Flanagan, John G.

☐ Callender, Murchison G.E.

☐ Chou, B. Ralph

< Previous step

Save and finish >

Adjust the synchronization – keep or remove

Synchronize Groups



1. Upload file

2. Organize and save

Verify changes

Type to filter



Edit



Tags



Newly added



Will be removed

| | | | | | | |
|--------------------------|--|-----------------------------|----------------------------------|------|----------------------------------|--------|
| <input type="checkbox"/> | | Lakshminarayanan, Vasudevan | <input type="radio"/> | Keep | <input checked="" type="radio"/> | Remove |
| <input type="checkbox"/> | | Simpson, Trefford Lee | <input type="radio"/> | Keep | <input checked="" type="radio"/> | Remove |
| <input type="checkbox"/> | | Hildebrand, Jenna M. | <input type="radio"/> | Keep | <input checked="" type="radio"/> | Remove |
| <input type="checkbox"/> | | Haines, Lacey | <input type="radio"/> | Keep | <input checked="" type="radio"/> | Remove |
| <input type="checkbox"/> | | Prokopich, C. Lisa | <input type="radio"/> | Keep | <input checked="" type="radio"/> | Remove |
| <input type="checkbox"/> | | Maciver, Sarah | <input checked="" type="radio"/> | Add | <input type="radio"/> | Remove |
| <input type="checkbox"/> | | Chou, B. Ralph | <input checked="" type="radio"/> | Add | <input type="radio"/> | Remove |
| <input type="checkbox"/> | | Chou, B. Ralph | <input checked="" type="radio"/> | Add | <input type="radio"/> | Remove |

< Previous step

Save and finish >

Updated hierarchy is visible in SciVal



SciVal

Overview

Benchmarking

Collaboration

Trends

Reporting

My SciVal

Scopus ↗



Hide tags

Institutions and Groups

Researchers and Groups

show ▼

Publication Sets

Countries and Groups

Topics and Research Areas

Settings

Researchers and Groups

Type to filter



All entities you can use in SciVal



Filter by tags



Add to panel

Tags ▼

Share

Edit

Delete

Export ▼

+ Add new ▼



Name

Tags



Athena University



Added



Faculty of Optometry



Added



Faculty of Quantum Computing



Added



Choh, Vivian



Added



Chou, B. Ralph



Added



Christian, Lisa W.T.



Added



Flanagan, John G.



Added



Furtado, Nadine M.



Added



Hileeto, Denise



Added



Hutchings, Natalie



Added

Practical tips & avoiding pitfalls

1. Have a structured process for building your structure: consider a building jam with people who know the researchers!
2. Deal with the red non-matched people first!
3. Think about creating a shared SciVal profile to hold your structure
4. Clearly communicate any version changes to the structure – two updates a year maximum
5. Not all researchers will have publications in year range but have successfully imported
6. Use tags to make structure visible in the left panel





Thank you

