

Creating a Researcher Group in SciVal

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Introduction

This guide provides step-by-step instructions on how to create a Researcher Group in SciVal. This will subsequently enable you to run citations-based analyses on the Scopus-indexed publications authored by the researchers in your defined group. Information is also provided on how to share your SciVal Researcher Group with other ECU SciVal users.

1. SciVal and the ECU Institutional Hierarchy

[SciVal](#) is a research performance assessment tool provided by Elsevier that draws on the publication and citation data from [Scopus](#). SciVal includes a range of modules that enables publication, citation, and trend analyses, as well as benchmarking and collaboration evaluations.

The ECU Institutional Hierarchy in SciVal enables ECU users to create citations-based analyses at the level of ECU Schools, Strategic Research Institutes and Strategic Research Centres. The hierarchy is accessible under *Researchers and Groups* in the *Entity list* in the *Explore* analysis section. The hierarchy is also available under *Researchers and Groups* in *All Metrics* and *Collaboration matrix* within the *Compare* analysis section. The hierarchy can be used to gather data, benchmark performance and/or generate reports for ECU organisational units based on the staff affiliated with the given unit.

School-level Research Centres/Groups *are not* included in the ECU Institutional Hierarchy in SciVal. However, SciVal users can create their own researcher groups under the *Researchers and Groups* section in SciVal. Users can then use the same functionality, as available for those organisational units defined in the hierarchy, to benchmark performance and generate reports for your researcher group(s).

This guide will provide two different methods for creating a new Researcher Group in SciVal:

- **Method 1:** This method involves creating a Researcher Group from the existing set of researchers included in the ECU Institutional Hierarchy (**Section 2**).
- **Method 2:** This method involves creating a Researcher Group that includes researchers from outside the ECU Institutional Hierarchy and which need to be added into SciVal from Scopus (**Section 3**).

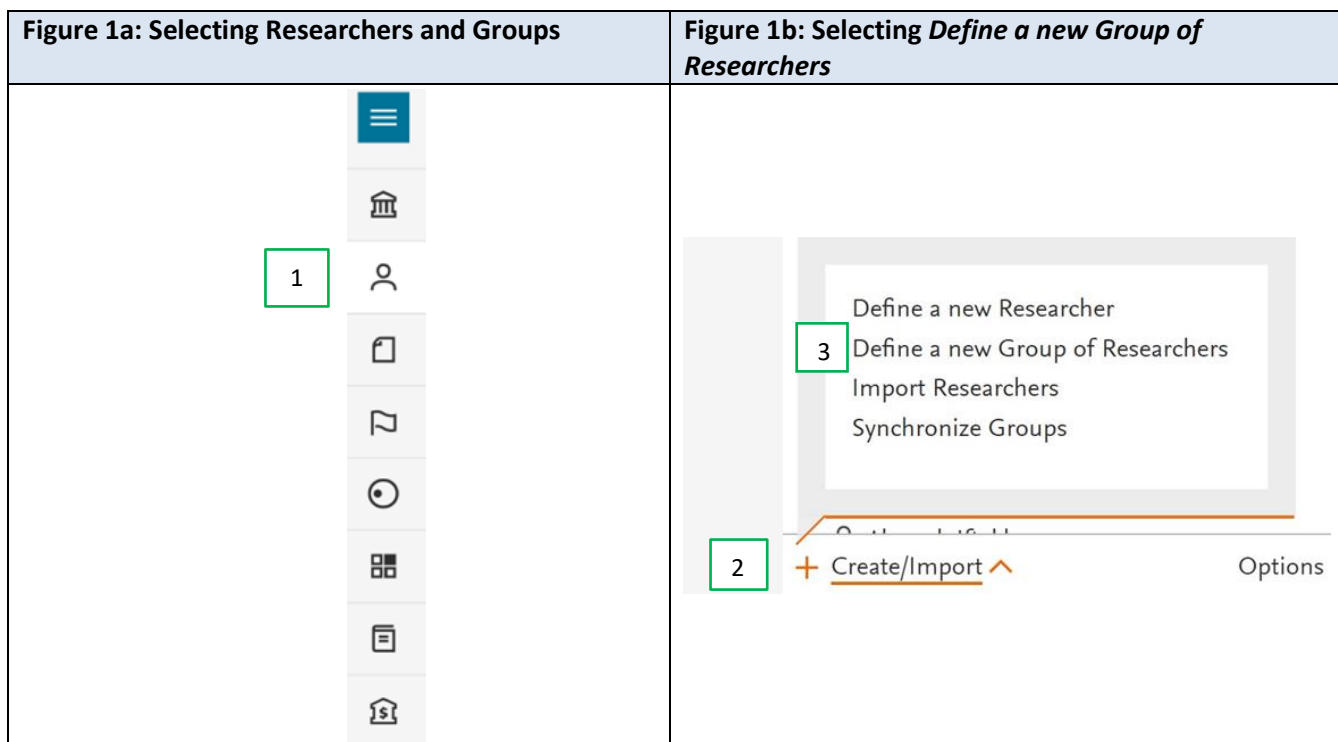
2. Creating a new Researcher Group using the ECU Hierarchy

The easiest way to create a new researcher group is to build this group from the existing set of researchers that are included in the ECU Institutional Hierarchy. All the hierarchy researchers are readily available in the *Define a new Group of Researchers* function and can be selected and combined to form new researcher groups.

2.1 Opening the Define a new Group of Researchers screen

To create a new Researcher Group, first click on the *Entity list* in the *Explore* analysis section or select *All metrics* or *Collaboration matrix* in the *Compare* analysis section. Then, as shown across *Figure 1a* and *Figure 1b*, open the *Define a new Group of Researchers* function via the following steps:

1. Select *Researchers and Groups*.
2. Click on *Create/Import*.
3. Select *Define a new Group of Researchers*.



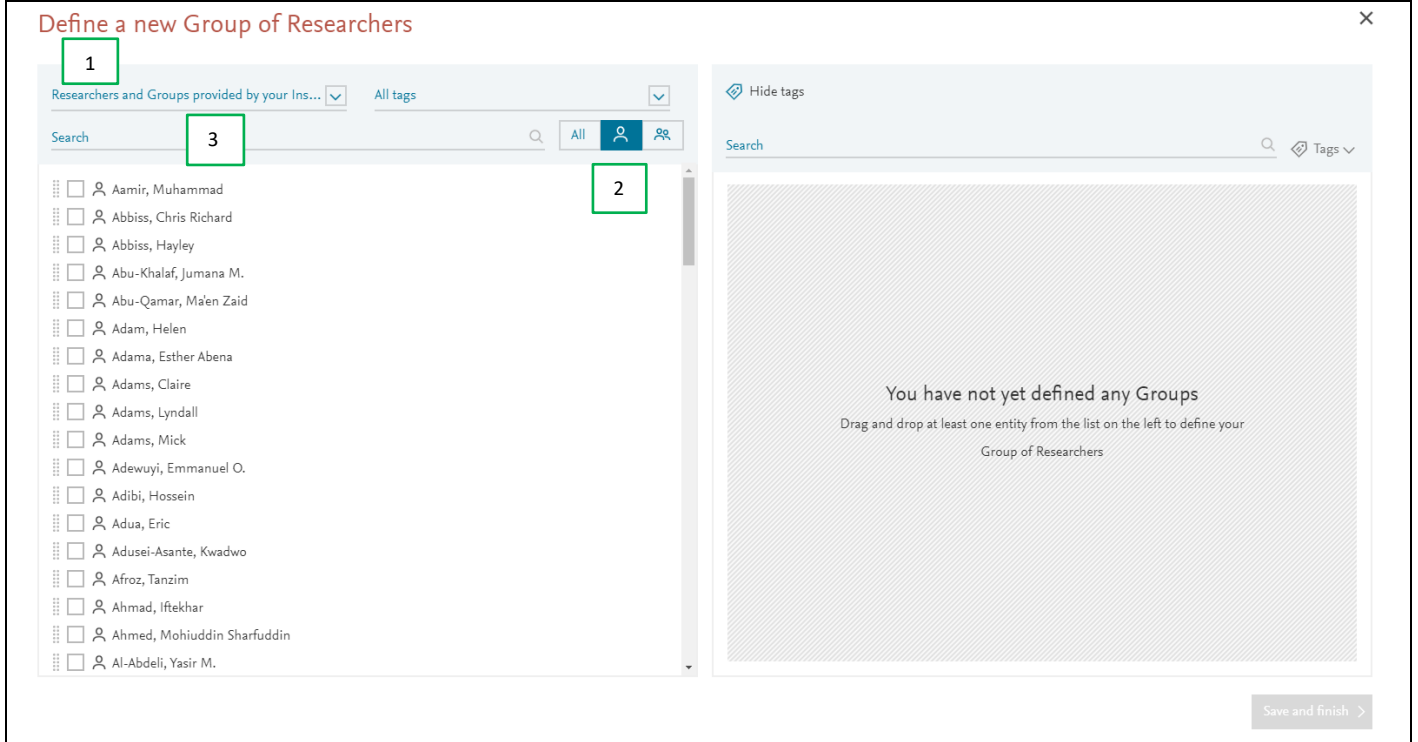
As shown in *Figure 2*, the resultant *Define a new Group of Researchers* screen is organised into two halves. The left-hand side of the screen provides the list of researchers that are available to add to a new Researcher Group. Researchers are then dragged and dropped into the right-hand side of the screen to create the new group.

2.2 Finding ECU Institutional Hierarchy researchers

The following steps (also illustrated in *Figure 2*) detail how to find ECU Institutional Hierarchy researchers in the *Define a new Group of Researchers* screen.

1. Set the Researcher filter to *Researchers and Groups provided by your Institution*. This will limit the researchers to those that are available in the current ECU Institutional Hierarchy.
2. Limit the type of entities to be listed on the left-hand side of the screen:
 - a. If only individual researchers are required, select the single person symbol.
 - b. If only groups of researchers are required select the double person symbol. This latter option will limit the list to the organisational units included the hierarchy. Each organisational unit can be expanded to reveal its researcher membership, which can be useful if the new group is to be built from researchers in an existing organisational unit.
3. Locate a specific researcher using the search functionality.
4. Determine if all the researchers required for your new researcher group are available. If this is the case, then proceed to **Section 2.3**. If this is not the case, then proceed to **Section 3 - Creating a new group with researchers outside the hierarchy**.

Figure 2: Setting the filters in the Define a new Group of Researchers screen for hierarchy researchers



2.3 Populating and naming the new Researcher Group

The following steps (also illustrated in *Figure 3a* to *Figure 3c*) detail how to populate and name the new Researcher Group in the *Define a new Group of Researchers* screen.

1. Drag and drop the name of the **first researcher** to be included in the group on the right-hand side of the screen. This will trigger the creation of the group and enable a name to be assigned to this group.
2. Create a name for the Researcher Group.
3. Drag and drop all researchers required for the group. **Note:** it is necessary to drop a researcher's name **on top of the name of the Researcher Group** to add this researcher to the group.

Figure 3a: Adding the first researcher

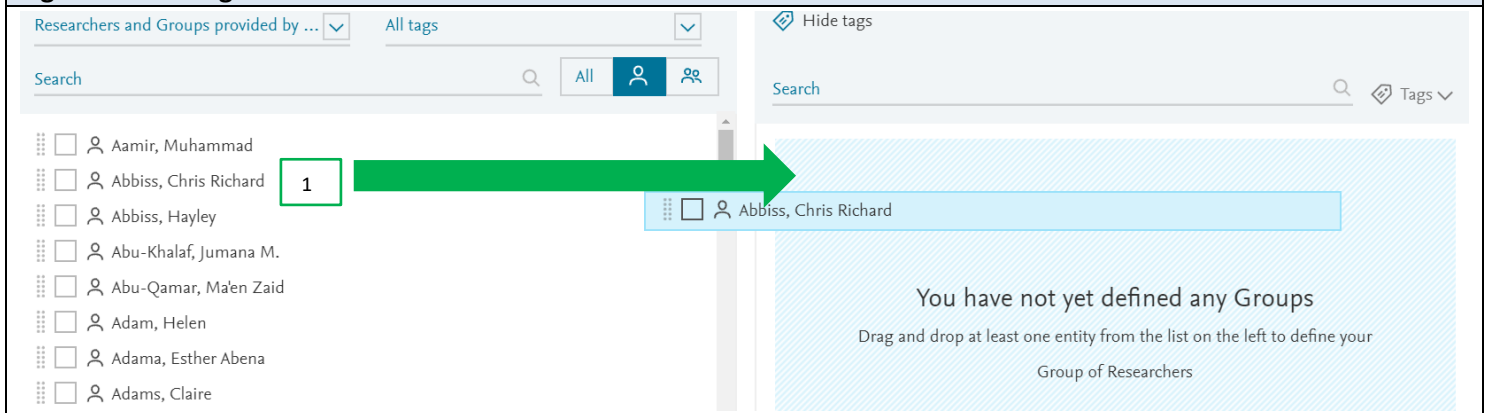


Figure 3b: Creating a name for the Researcher Group

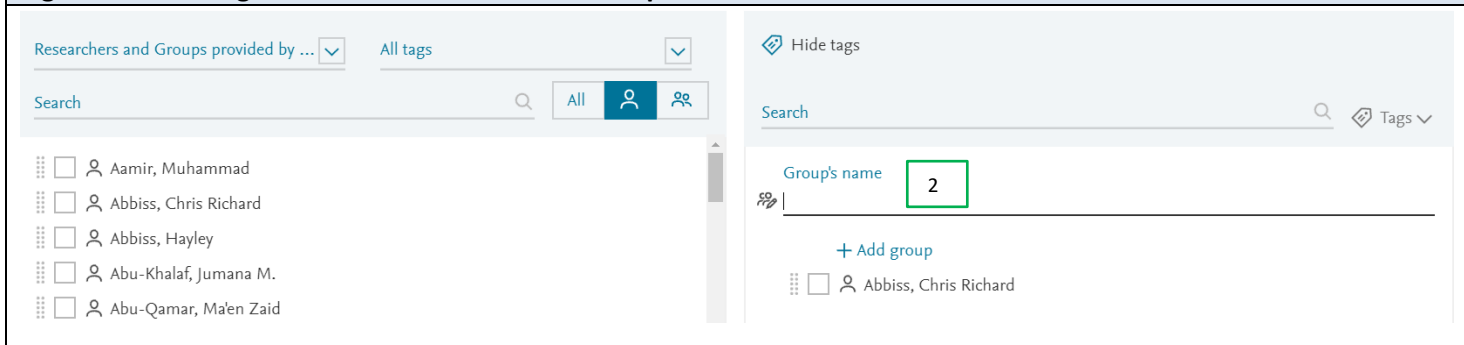
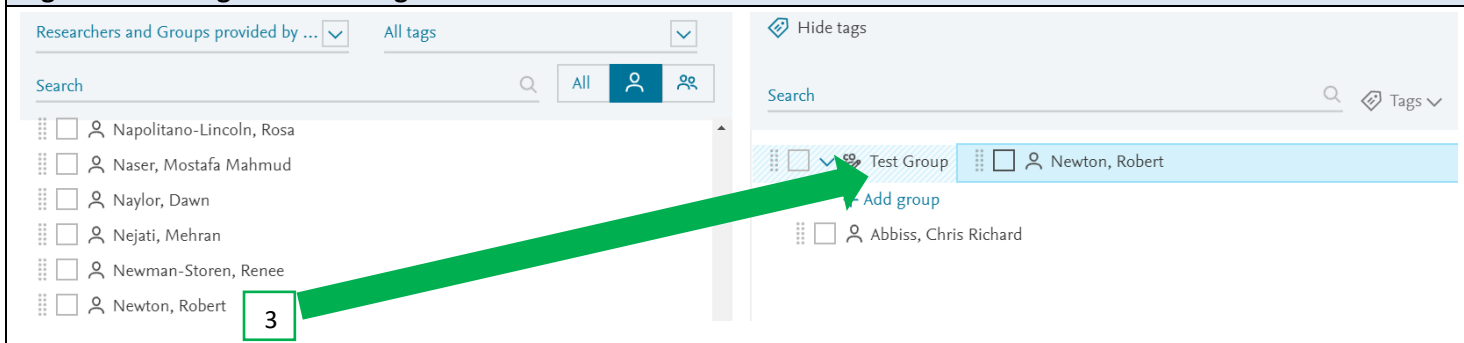


Figure 3c: Adding the remaining researchers



2.4 Finalising the new Researcher Group

Once all the researchers have been added to the group, click *Save and finish* to generate the new group. The new Researcher Group will now be available to use. It will be accessible under *Researchers and Groups* via the *Entity* list in the *Explore* analysis section and in *All metrics* and *Collaboration metrics* under the *Compare* analysis section.

To rename and modify your new researcher group refer to **Section 4.4**.

3. Creating a new group with researchers from outside the ECU Hierarchy

It is possible that there may be some researchers that you want to include in a new Researcher Group that are not included in the ECU Institutional Hierarchy. Therefore, for these researchers to be available to you, you will need to add these researchers into your SciVal view. This section will outline how to add researchers into SciVal and will detail how to create a new Researcher Group once all the required researchers are available to you in SciVal.

3.1 Opening the Define a new Group of Researchers screen

To create a new Researcher Group, first click on the *Entity list* in the *Explore* analysis section or select *All metrics* or *Collaboration matrix* in the *Compare* analysis section. Then, as shown across *Figure 1a* and *Figure 1b*, open the *Define a new Group of Researchers* function via the following steps:

1. Select *Researchers and Groups*.
2. Click on *Create/Import*.
3. Select *Define a new Group of Researchers*.

As shown in *Figure 2*, the *Define a new Group of Researchers* screen is organised into two halves. The left-hand side of the screen provides the list of researchers that are available to add to a new Researcher Group. Researchers are then dragged and dropped into the right-hand side of the screen to create the new group.

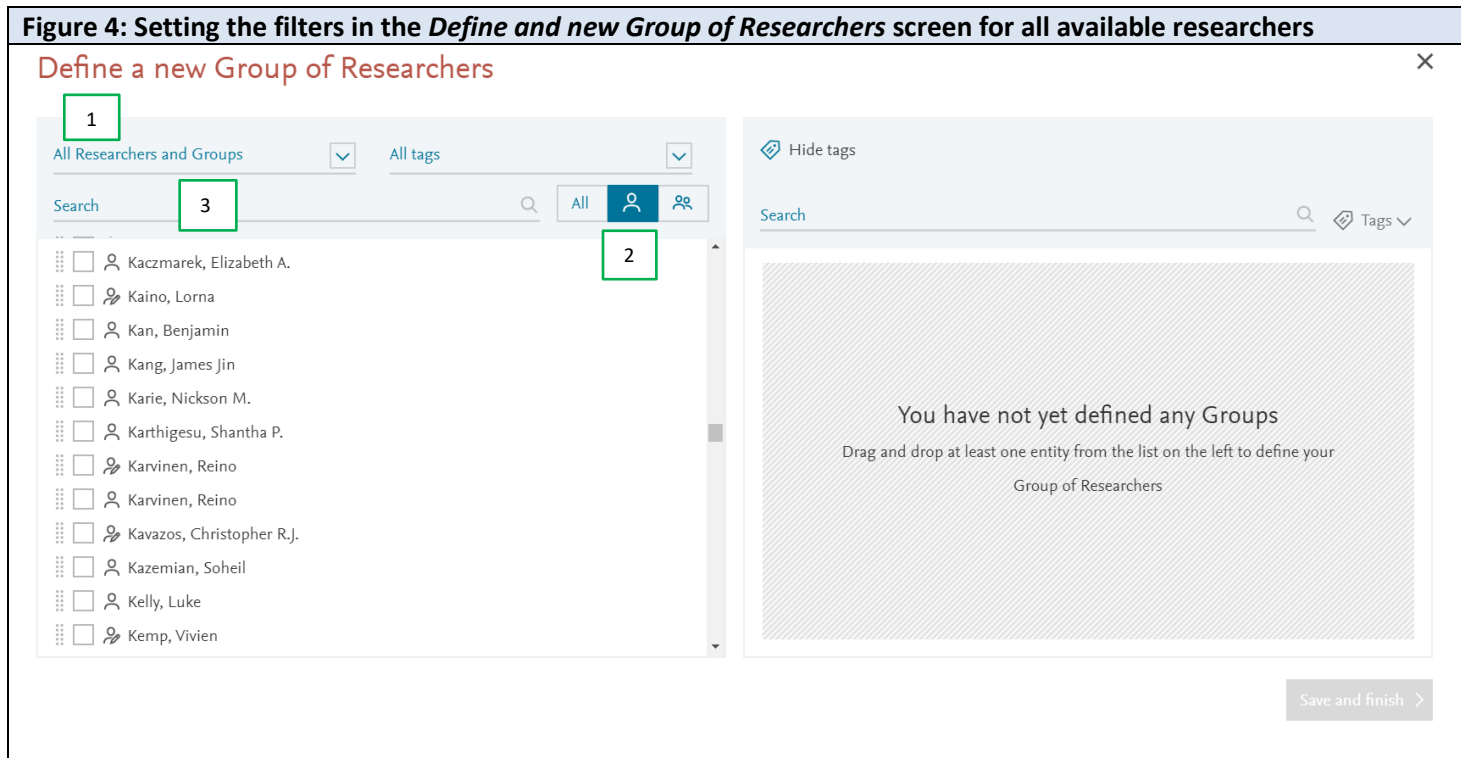
3.2 Finding researchers from outside the ECU Institutional Hierarchy

The following steps (also illustrated in *Figure 4*) detail how to find researchers from outside the ECU Institutional Hierarchy in the *Define a new Group of Researchers* screen.

1. Leave the Researcher filter as *All Researchers and Groups* – which is the default setting. This will include all researchers and Researcher Groups available to you in SciVal, including any researchers added to your SciVal view outside of the hierarchy.
2. Limit the type of entities to be listed on the left-hand side of the screen to *individual researchers* via the single person symbol. This will focus the list on individual researchers and remove the researcher group listings.
3. Locate a specific researcher using the search functionality.
4. Determine if all the researchers required for your new researcher group are available. If this is the case, then proceed to **Section 3.4**. If this is not the case, then proceed to **Section 3.3**.

RECOMMENDATION: As will be described in **Section 4**, it is possible to modify the membership of a Researcher Group after it has been created. However, if you determine from the *Define a new Group of Researchers* screen that you do not have immediate access to all required researchers, it is recommended that you cancel the creation of the new group and first add these additional researchers to SciVal (as described in **Section 3.3**). This will then enable you to go back into the *Define a new Group of Researchers* screen and add all the researchers at once (as described in **Section 3.4**).

Figure 4: Setting the filters in the *Define and new Group of Researchers* screen for all available researchers



3.3 Adding additional researchers to SciVal from Scopus

If you find that one or more researchers required for your new Researcher Group are not currently available to you in SciVal, then you will need to add them. Each author-level SciVal profile is based on that individual's Scopus author profile. As a result, additional researchers can be added by exporting their Scopus author profile from Scopus to SciVal.

3.3.1 Finding a researcher in Scopus

Each researcher who has at least one output indexed in Scopus will have a Scopus author profile. Each of these authors is searchable in Scopus. To find an author, first open the Scopus database, and then follow the steps below (as also illustrated in *Figure 5a* and *Figure 5b*):

1. Click on *Authors* and select the *Author name* search option.
2. Enter the *last name* and *first name* of the author.
3. Click on *Add affiliation*.
4. Enter the author's institutional affiliation.
5. Click *Search* and Scopus will retrieve the search results.

Figure 5a: Searching for an author – entering the author's name

Documents **Authors** Researcher Discovery Organizations Search tips ?

Search authors using: Author name ORCID Keyword New

Enter last name * newton Enter first name robert

+ Add affiliation Search

Figure 5b: Searching for an author – entering institutional affiliation and executing the search

Documents **Authors** Researcher Discovery Organizations Search tips ?

Search authors using: Author name ORCID Keyword New

Enter last name * newton Enter first name robert

Enter affiliation name edith cowan university

Search

Note: A researcher can also be found via their ORCID iD by selecting the ORCID search option. However, this search option will only be helpful if the researcher's ORCID iD and Scopus Author ID are linked in Scopus.

3.3.2 Opening and reviewing a Scopus author profile

Before transferring a Scopus author profile to SciVal, it is important to first verify that the selected author profile represents the correct author. This validation can be undertaken by reviewing the publications captured in this profile. A given profile can be opened and reviewed by clicking on author's name as listed in the search results.

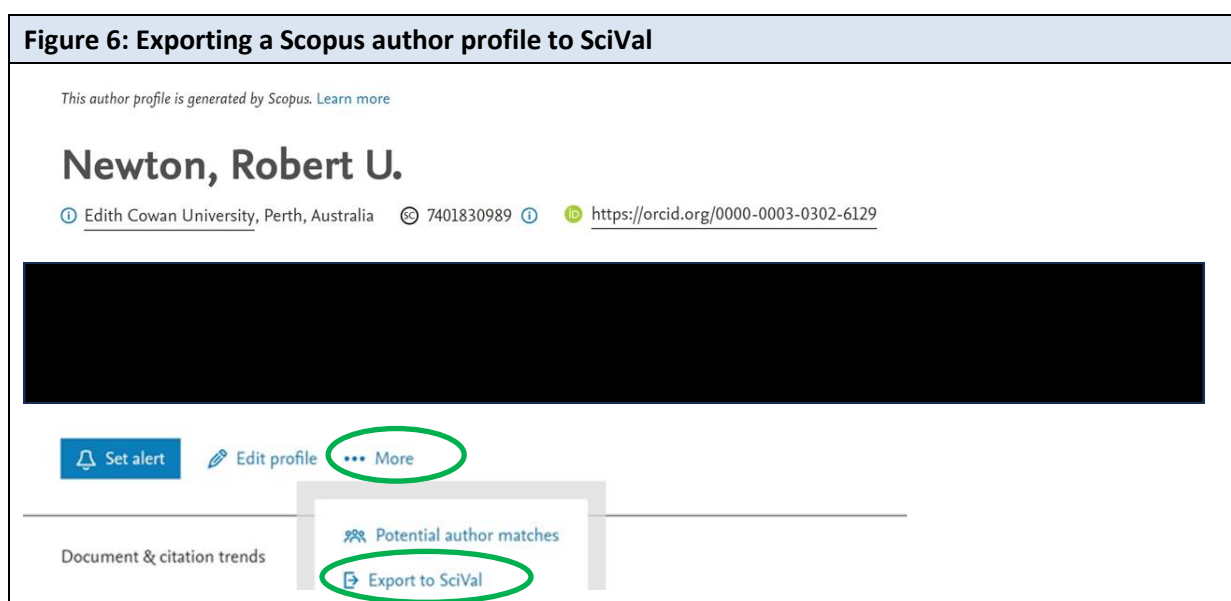
Below are some possible scenarios that could arise after completing an author search:

- *A single author profile retrieved.* Review the publications listed in this author profile. If you are satisfied that this is the correct author profile, then proceed to **Section 3.3.3**.
- *More than one author profile is retrieved.* First review the name and affiliation data provided for each author listed in the search result. If you find an appropriate name/affiliation, then proceed to open this profile and review the listed publications.
 - If you are confident that one of these profiles belongs to the researcher in question, then proceed to **Section 3.3.3**.

- If you think that more than one of these records belong to the same author, then these records will need to be merged. It is recommended that you refer the issue of multiple Scopus author profiles back to author themselves. The author can either go to the [Scopus Support Center](#) for information on how to correct their author profile(s), or they can seek further assistance from the ECU Library Research Services team at researchonline@ecu.edu.au.
- *If there are no records retrieved.* Consider trying an alternative affiliation name in the search, and then review the subsequent search results. However, it is possible that the researcher has no outputs indexed in Scopus and thus no Scopus author profile. If so, this individual cannot be added to your SciVal researcher group.

3.3.3 Exporting a Scopus author profile to SciVal

Once the correct Scopus author profile has been identified this can then be exported to SciVal. To do this, first ensure that you are logged into SciVal and then open the Scopus author profile. Click on **More** and then click on **Export to SciVal** to complete the export process (as illustrated in *Figure 6*).



The Scopus author profile will now be transferred to SciVal. This profile will now be available to add to your Researcher Group.

Follow the same steps to transfer all the required researchers to SciVal.

Note: More information on transferring Scopus author profiles to SciVal can be found in the **Get from your Scopus author ID to your SciVal profile** section in the [SciVal](#) page of the *A Research Companion* Library Guide.

3.4 Populating and naming the new Researcher Group

Once you have added all the researchers to SciVal that are required for the group, you can now return to creating the group. Reopen the *Define a new Group of Researchers* (see **Section 3.1**) and keep the Researcher filter as *All Researchers and Groups* (see Step 1 in **Section 3.2**). This will ensure that all the researchers available to you in SciVal are listed on the left-hand side of the screen, including any researchers you have recently added to SciVal. Remember to also set the entity type to *individual researchers* (see Step 2 in **Section 3.2**) so that you can locate individual researchers using the search functionality.

You can now populate and name the new Researcher Group using the steps described in **Section 2.3** and illustrated in *Figures 3a to Figure 3c*.

3.5 Finalising the new Researcher Group

Once all the researchers have been added to the group click *Save and finish* to generate the new group. The new Researcher Group will now be available to use. It will be accessible under *Researchers and Groups* via the *Entity list* in the *Explore* analysis section or in *All metrics* or *Collaboration matrix* in the *Compare* analysis section.

To rename and modify your new researcher group refer to **Section 4.4**.

4. Managing a Researcher Group

Once you have created your Researcher Group, you may wish to share it with other colleagues. Also, a Researcher Group, such as a School-level Research Centre, does not remain static and it is likely that you will need to change its membership over time, or even change the name of the Researcher Group itself.

The sections below detail how to find, edit and share your Researcher Group(s).

4.1 Finding a Researcher Group in My SciVal

To find your Researcher Group:

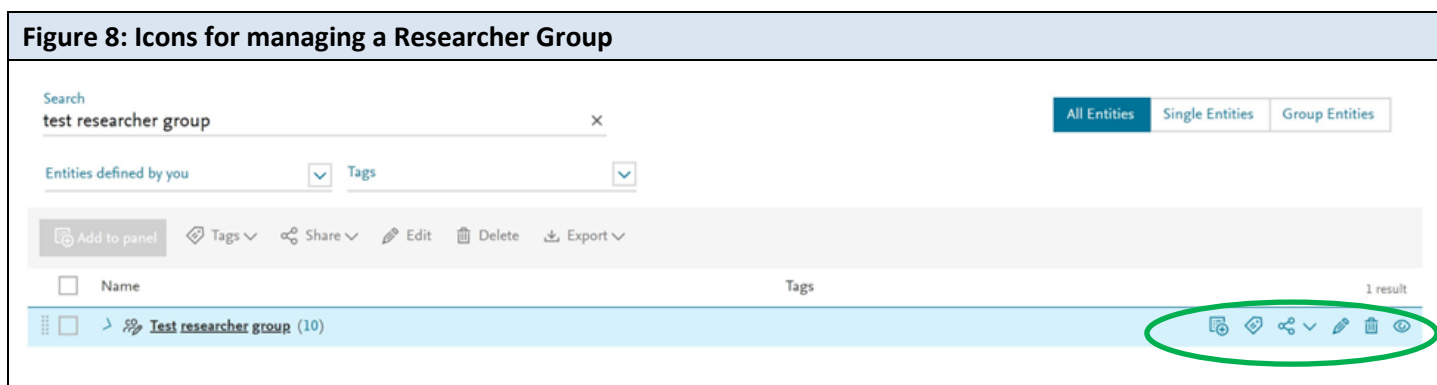
- Click on *My SciVal* at the top of the SciVal screen.
- Go to the left-hand side of the screen and select *Researchers and Groups*.
- Go to the drop-down under the search box (as shown in *Figure 7*) and select *Entities defined by you*.
- Enter the name of your Researcher Group in the search box to limit the results to this specific group.









4.2 Managing a Researcher Group


To access the management functionality for your Researcher Group:

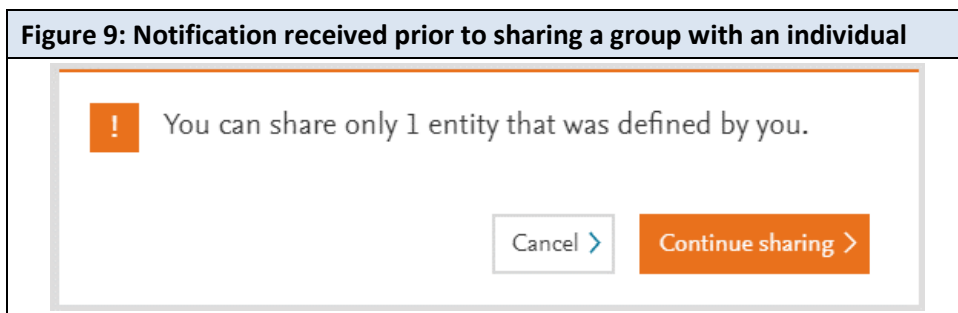
- Move your cursor to the name of your Researcher Group to reveal a series of icons on the right-hand side of the screen (as shown in *Figure 8*).



-  enables you to remove the Researcher Group from the entity Selection Panel (i.e., it will no longer be listed under *Researchers and Groups* in *Explore* and the relevant *Compare* subsections).
-  enables you to add a tag to your Researcher Group. This can be helpful for retrieving Researcher Groups with a shared tag, or for locating a Researcher Group within a large set of Researcher Groups.
-  enables you to share your Researcher Group with other ECU SciVal users.
-  enables you to modify the membership of your Researcher Group as well as rename the group.
-  enables you to delete your Researcher Group entirely from SciVal. **Do not delete the entities (researchers) inside a Researcher Group as they will be lost from shared groups.**
-  enables you to view the given Researcher Group in either *Explore* or *Benchmark*.

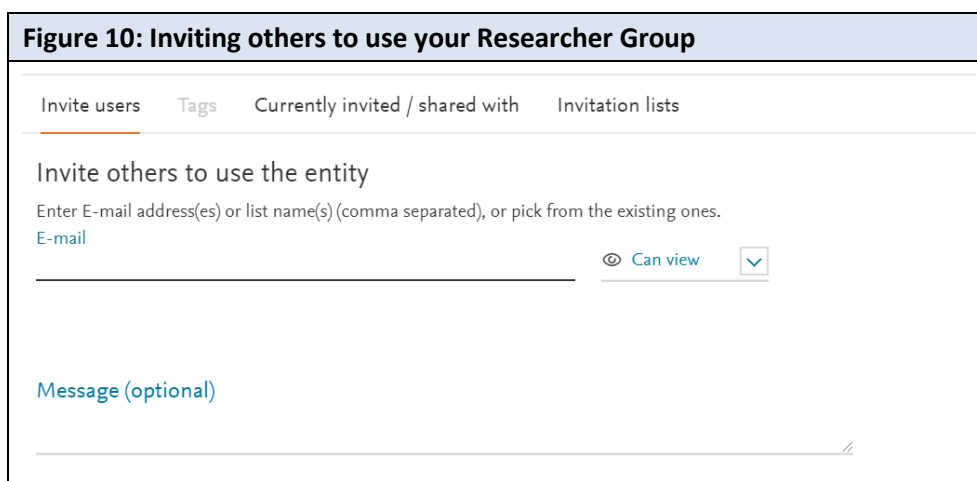
4.3 Sharing your Researcher Group

You can share your Researcher Group with other ECU SciVal users by clicking on  and then selecting *Share with individuals*. You will then receive the notification as shown in *Figure 9* below. **Please note that you can create as many groups as you like and share any or all of them.** Therefore, click on *Continue sharing* if you want to proceed with sharing this group with another individual.




As shown in *Figure 10*, you must then enter the email address of the ECU SciVal users for whom you want to share your researcher group and can assign them *view* or *edit* access to this group.

The invitees will receive an email invitation to the researcher group and will be asked to follow the instructions provided to access the group. You can also compose a message to accompany the email invitation.

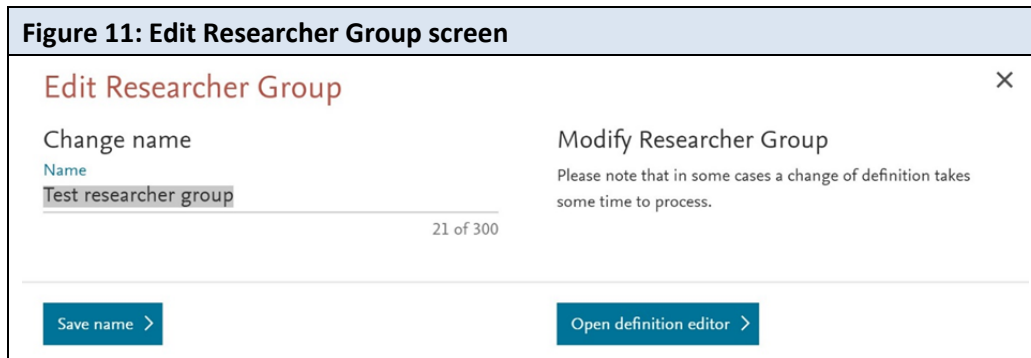


4.4 Updating the name and/or membership of your Researcher Group

To update the name or membership of your Researcher Group, click on  to open the *Edit Researcher Group* screen (see *Figure 11* below).

4.4.1 Updating the name of your Researcher Group

To change the name of your Researcher Group, enter the new name under *Change name* and click on *Save name*.

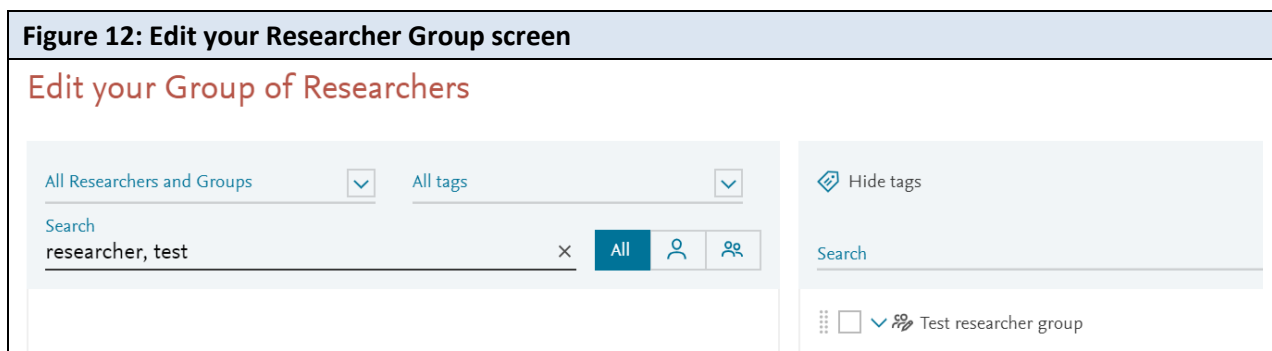


4.4.2 Updating the membership of your Researcher Group

To change the membership of your Researcher Group, click on *Open definition editor* (see *Figure 11* above).

As illustrated in *Figure 12*, to **add** a researcher to your Researcher Group, go to the left-hand side of the screen and search for them by name (last name, first name). All authors listed under your *Researchers and Groups* in *My SciVal* will be available in the editor screen, including all authors in the current ECU Institutional Hierarchy. If the person you want to add is not listed under *All Researchers and Groups*, they will first need to be added to SciVal (see **Section 3.3**) before they will be available in the editor screen. Once you have found the correct author, they can be dragged into your Researcher Group on the right-hand side of the screen.

To **remove** a researcher from your Researcher Group, go to the right-hand side of the screen, where you will find your Researcher Group and the list of researchers included in that group. You can highlight a given author and then click on the cross adjacent to their name to remove them from your Researcher Group.



5. Contacts

If you require further assistance regarding the creation of Researcher Groups, or have questions relating to the ECU Institutional Hierarchy, you can contact [Research Services](#).

If you require further assistance on using SciVal, please refer to the [SciVal](#) page of *A Research Companion Library Guide*, or contact the Library at researchonline@ecu.edu.au.