

Allocation



Video

Navigate to Settings

Admins can go to the Nest Settings, scroll down to Allocation and click the toggle bar on.

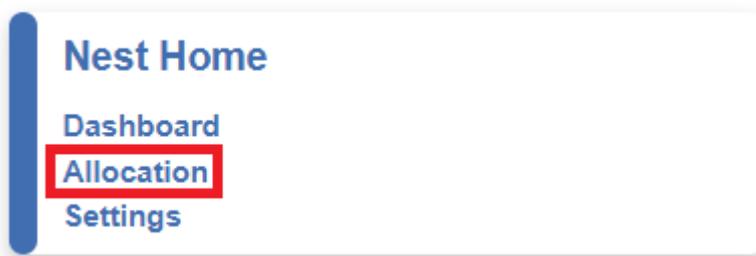
Allocation

Allocation enables you to assign Screening and other modules to specific users for sets of records. Turning on Allocation will reveal an Allocation page where you may allocate records on various criteria. Allocation applies to either all modules or none, and a user's queue will contain only the records allocated to them. Records unallocated for a particular module will not be presented to any user in that module.

Choose Whether to Allocate:



Turning on Allocation will reveal an Allocation page under the Nest Home menu bar where you may allocate records on various criteria.



If you turn on Allocation, you must assign all modules or none, at the moment there is no mix and match of allocated and unallocated modules. As an admin you can assign all user types including yourself and each assigned user will only be able to view records allocated to them (regardless of whether they are an admin). Records unallocated for a particular module will not be presented to any user in that module and must be allocated first.

Instructions on How to Allocate Records

In order to allocate records, records must be present in the nest. So first ensure you add a [Literature Search](#) to pull in records to be screened.

You can allocate records for the following modules: [Screening](#), [Tagging](#), [Extraction](#) and [Critical Appraisal](#).

1. Navigate to Allocation Admin Page

This page can be accessed under the Nest Home menu bar or by clicking on any module that has unassigned records will direct you to "Allocation Admin."

2. Select Allocation module

In the top right dropdown, you can select the module you want to allocate records in. If you have just added a search, you will only be able to add screening allocation at this time since no records have been advanced beyond screening.

The screenshot shows the Allocation Admin interface. On the left is a sidebar with navigation options: Nest Home (Dashboard, Allocation, Settings), Literature Search (1 / 1), Screening (0 / 37), Tagging, Extraction, Study Inspector, and Synthesis. The main area features a large blue circle labeled 'Unallocated'. Below this is a 'Study Allocation' table with columns: Title, Author, Publication Year, and Screening Allocation. The table lists several records with their respective authors and years. At the bottom, there is an 'Allocate' button, a dropdown for '37 records to', a user selection dropdown, and a 'Confirm' button. A dropdown menu at the top right is set to 'Screening'.

Title	Author	Publication Year	Screening Allocation
Dairy Product Consumption and Incident Prediabet...	Sturink, Isabel AI	2023	
Effect of Cheese Intake on Cardiovascular Disease...	Hu, Meng-Jin	2022	
Avocado Consumption and Risk of Cardiovascular ...	Pacheco, Lorena S	2022	
Associations Between Dietary Patterns and Inciden...	Gao, Min	2022	
Dietary patterns, dietary nutrients and cardiovascul...	Nestel, Paul J	2022	
Dairy Foods: Is Its Cardiovascular Risk Profile Cha...	Nestel, Paul J	2022	
Dietary Fatty Acids, Macronutrient Substitutions, F...	Steur, Marinka	2021	

3. Filter to Records to Assign

Add a filter to only assign a specific set of records to a user. These are the same filters that are available to use in [Study Inspector](#). For instance, you can filter by a range of [Ref IDs](#) and assign the resulting records to a single user.

This is not necessary if you want to assign all records to one user, you can move straight to the next step.

Allocation module: Screening

Unallocated

Study Allocation

Add Filter Authors Nestel Start Typing Clear Filters

Title	Author	Publication Year	Screening Allocation
Dietary patterns, dietary nutrients and cardiovascul...	Nestel, Paul J	2022	
Dairy Foods: Is Its Cardiovascular Risk Profile Cha...	Nestel, Paul J	2022	
Effects of low-fat or full-fat fermented and non-ferm...	Nestel, Paul J	2013	
Circulating inflammatory and atherogenic biomarke...	Nestel, P J	2012	

Allocate 4 records to User for Screening Confirm

Note: some filters are automatically added, displayed in grey, and cannot be removed for different allocation modules. This is because they are a necessary filter for studies in that module. For example, only records that have been included in Screening will be displayed in the Tagging allocation module, so a “Final Screening Status: Included” will be displayed.

4. Allocate Records to User(s)

Below, select the user you would like to allocate these records and hit Confirm. Allocated users are not notified in anyway, but only allocated records are displayed to them when they open the nest. In the below example, 4 filtered records out of 37 are being allocated. The **A** next to a users name means they are an admin of the nest.

Allocation module: Screening

Unallocated

Study Allocation

Add Filter Authors Nestel Start Typing Clear Filters

Title	Author	Publication Year	Screening Allocation
Dietary patterns, dietary nutrients and cardiovascul...	Nestel, Paul J	2022	
Dairy Foods: Is Its Cardiovascular Risk Profile Cha...	Nestel, Paul J	2022	
Effects of low-fat or full-fat fermented and non-ferm...	Nestel, Paul J	2013	
Circulating inflammatory and atherogenic biomarke...	Nestel, P J	2012	

Allocate 4 records to Search for Screening Confirm

- A Jade Thurnham
- Jeff Johnson
- John Pederson
- Karl Holub
- Kathryn Cowie

Venn Diagram Explained

Once confirmed, the visual venn diagram will display names of users who have been allocated records with exact numbers when you hover over each venn, as well as unallocated records. It shows the overlap (if there is any) of assigned records between users. In this example, 4 records were allocated to Jeff Johnson, while 33 records remain unallocated.

The screenshot shows the 'Study Allocation' interface. On the left is a sidebar with navigation options: Nest Home, Literature Search (1 / 1), Screening (0 / 37), Tagging, Extraction, Study Inspector, and Synthesis. The main area features a Venn diagram with two circles: a large light blue circle labeled 'Unallocated' and a smaller light blue circle labeled 'Jeff Johnson'. A red box highlights the 'Jeff Johnson' circle, and a tooltip shows 'Jeff Johnson: 4'. Below the Venn diagram is a table with columns: Title, Author, Publication Year, and Screening Allocation. The table lists four records allocated to Jeff Johnson. At the bottom, an 'Allocate' dropdown shows '4 records to Jeff Johnson for Screening' with a 'Confirm' button.

Title	Author	Publication Year	Screening Allocation
Dietary patterns, dietary nutrients and cardiovascul...	Nestel, Paul J	2022	Jeff Johnson
Dairy Foods: Is Its Cardiovascular Risk Profile Cha...	Nestel, Paul J	2022	Jeff Johnson
Effects of low-fat or full-fat fermented and non-ferm...	Nestel, Paul J	2013	Jeff Johnson
Circulating inflammatory and atherogenic biomarke...	Nestel, P J	2012	Jeff Johnson

Clicking on each venn will automatically add a filter to display a list of corresponding records below to allow ease of allocating records. For example, to quickly allocate the rest of the unallocated records, here we can click on the "Unallocated" venn and it will filter to the remaining 33 records.

The screenshot shows the 'Study Allocation' interface after clicking the 'Unallocated' Venn. The Venn diagram now has a red box around the 'Unallocated' circle. The table below shows a list of 33 records that are currently unallocated. The 'Allocate' dropdown at the bottom shows '33 records to User for Screening' with a 'Confirm' button.

Title	Author	Publication Year	Screening Allocation
Dairy Product Consumption and Incident Prediabet...	Sturink, Isabel AI	2023	
Effect of Cheese Intake on Cardiovascular Disease...	Hu, Meng-Jin	2022	
Avocado Consumption and Risk of Cardiovascular ...	Pacheco, Lorena S	2022	
Associations Between Dietary Patterns and Inciden...	Gao, Min	2022	
Dietary Fatty Acids, Macronutrient Substitutions, F...	Steur, Marinka	2021	
Cow's Milk and Dairy Consumption: Is There Now ...	Poppitt, Sally D	2020	
Identifying environmental risk factors and gene-env...	Addissie, Yonit A	2021	

Deallocate Records

In addition to allocating records, you can deallocate records from users. To do so, filter to the module

and records of choice, click the "Allocate" dropdown, select "Deallocate," select the user and click Confirm.

Note: Deallocating users from records does not remove their work performed/decisions that were made prior to deallocation.

Allocating the Same Records to Multiple Users in Single Modes

In the case you assign a record to multiple users but your nest is configured in single modes (i.e. Standard Screening, Standard Tagging, etc.), **this does not mean it will be reviewed twice.** It just means it will show up in each users' queue until one of them completes the work on the record, where it will be removed from the other users' queue.

Allocation Module Status

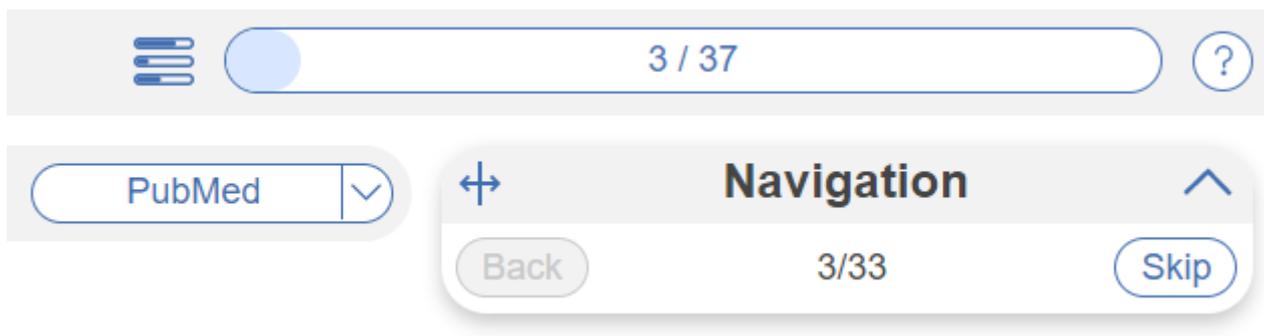
As you allocate records in each module, the allocation module status can be viewed in the dropdown:



- No circle = 0 records have been allocated
- Empty circle = Some records have been allocated, some are currently unallocated
- Full circle = Everything is allocated

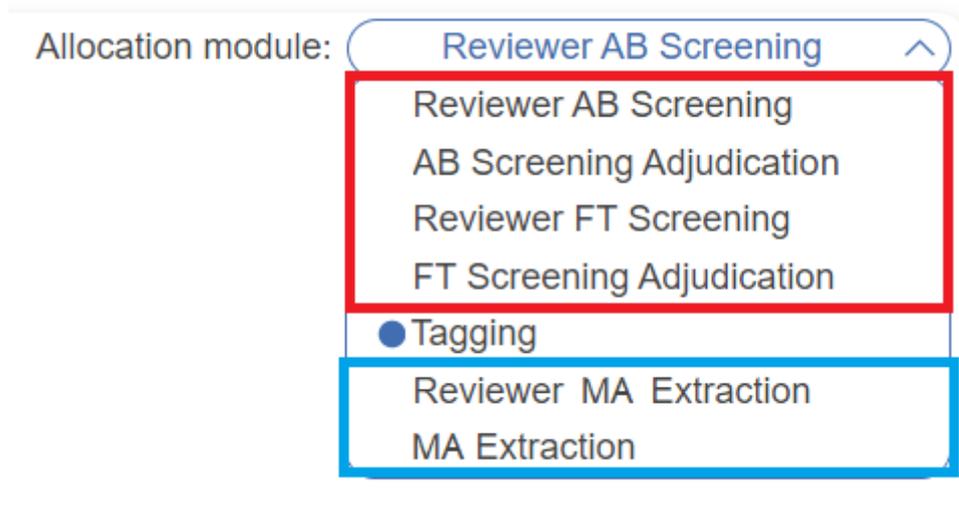
Tracking User Progress

While nest menu progress bars display overall nest progress, individual users can view their progress in the Navigation bars within each module. In the below example, the top bar displays progress on all studies in nest, while the navigation numbers displays individual users' progress within the specific module of the nest.



Allocation in Dual Modes

If your nest has dual modes configured for any of the modules, separate allocation is required for reviewer-level steps and adjudicator-level steps. In the example below, both Dual Two Pass Screening (allocation modules circled in red) and Dual Extraction are configured (allocation modules circled in blue).



It can get a little tricky so be sure to be intentional about allocating users to different steps.



Note: you cannot prematurely allocate users to steps when decisions affecting those steps haven't been made. For example, you cannot assign adjudication steps before reviewer-level work is complete.

Dual, Two-Pass Allocation Procedure

If your nest is configured for Dual, Two-pass Screening, the procedure for Allocation **in order** is:

- **Allocate Abstract (AB) reviewer-level Screening:**

1. Follow the steps above in the allocation module "Reviewer AB Screening"
2. Then AB Screening at the reviewer-level **must be done before** allocating AB adjudication

- **Allocate Adjudication of Abstract Screening:**

1. Follow the steps above in the allocation module "AB Screening Adjudication"
2. Then Abstract Adjudication **must be done before** allocating Full Text (FT) Screening

- **Allocate Full Text (FT) reviewer-level Screening:**

1. Follow the steps above in the allocation module "Reviewer FT Screening"
2. Then FT Screening at the reviewer-level **must be done before** allocating FT adjudication

- **Allocate Adjudication of Full Text Screening:**

1. Follow the steps above in the allocation module “FT Screening Adjudication”
2. Then FT Adjudication **must be done before** allocating steps in the next module: Tagging

Switching between modes

When you switch between Screening modes, **all Allocation will be removed**. This means that, when you switch Screening modes, **you will need to re-allocate all studies in the queues for Screening steps** (such as Abstract reviewer-level screening, Abstract adjudication, etc.). If you return to a previous Screening mode, the Allocation for that mode will be saved, but the most recent Allocation will not be available.

Allocation for any study that has proceeded to the Tagging stage or later will not be impacted by switching Screening modes.

Exporting Allocation

In [Study Inspector](#), you can use the [Allocation filters](#) to view a list of records and users they were assigned to. To export this as a table, click the Download button in the top right corner.

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