

# Import Existing Screening Decisions or Tags

This page addresses how to move existing review data, specifically screening & tagging, from spreadsheets into your nest.

## Where to Import

Import can be found under [Settings](#).

**Settings: Basilar Artery - thrombectomy vs. thrombolysis**

(or explicitly granted access). You will still be able to share a link with external parties, and the external party will not have to log in to view Synthesis.

Making this nest private is the most secure option. Only users with explicitly granted access (either as an individual user or through their organization) will be able to view Synthesis.

**Static Manuscript**

Upload a PDF-based manuscript for this nest. Displayed on Synthesis only if the editable Manuscript is empty.

**Upload Static Manuscript:**

Upload .pdf

**Screening**

In Standard Screening, one user screens each record. Inclusion sends the record forward for gathering, such as tagging, extraction, and Risk of Bias assessment. Exclusion does not queue the record for gathering.

In Dual Screening, two users independently screen each record, and then all screening determinations are reviewed by an administrator. The administrator adjudicates any disagreement between the original screeners to set the final determination for each record.

In Two Pass Screening, all records are first rapidly screened using only title and abstract. Records may be advanced from title/abstract screening to more intensive full text screening, where final inclusion is determined.

In Dual Two Pass Screening, two users rapidly screen all records using only title/abstract and these determinations are reviewed and advanced by an administrator. Two users then screen all full texts and final inclusion is determined by the administrator.

**Inclusion Modeling**

Inclusion models predict the probability of individual records being included during screening, using your past screening decisions. These probabilities help AutoLit determine which studies to show first during the screening process to get you screening faster.

The model can be trained manually or automatically (recommended). If the inclusion model is set to automatic, the model will be retrained after every 10 newly screened records. Otherwise, the model can be trained and retrained manually during screening. Your nest must contain at least 1 inclusion and 10 records in order to train a model.

**Hiding the Model**

Probabilities predicted by the model may be displayed during screening to speed up work or hidden if you wish to minimize bias. Studies will still be ordered by inclusion probability, even when hidden. To completely remove probabilities and ordering, delete the existing inclusion model and turn off automatic training.

**Import**

Import existing screening decisions for any record already in your nest by uploading a spreadsheet.

**Choose Mode:**

☒ Standard  
☐ Two Pass

**Choose number of reviewers:**

☒ Single  
☐ Dual

**Choose mode:**

☐ Automatic Training  
[View Inclusion Model](#)

**Choose:**

☐ Hide Probabilities

**Upload data:**

[Begin](#)

- For **Screening**, see the “Import” section under Screening - select “**Begin**” under “Upload Data”
- For **Tagging**, see the “Import” section under Tagging - select “**Begin**” under “Upload Data”



You **cannot** import Screening and Tagging in a single sheet; all Import must be completed with only one module (Screening or Tagging) at a time.

**Warning:** New records CANNOT be added to the nest via Import; you can **only adjust the Screening and Tagging of existing records in the nest**. To import new records to the nest, see [Import Records](#).

## Import Screening Decisions

To import Screening Decisions, you will need to bring an Excel sheet or CSV formatted **exactly** as outlined below; you can use our template to ensure the formatting is correct.

Once you have selected “Begin,” a modal will open showing the ability to download the template, upload an Excel or CSV, and adjust settings:

### Format and Template

You can download the template from the Import Modal (see first red outline below):

### Import Screening

Import final screening decisions for any records **already present** in the nest. Your sheet must contain 1 to 3 of the following columns for matching:

- Title
- DOI
- PubMed ID

Additionally, the sheet should contain columns:

- Exclusion Reason (required): If the record is to be excluded, a reason for exclusion; left empty to include the record.
- Full Text Review (optional): true/false, yes/no are acceptable, used to indicate if the screening decision was made using the full text. Empty values, or column not supplied, indicate that screening decisions did not result from a full text review.

**Import Screening:** Upload a .csv or .xlsx sheet to proceed. A spreadsheet of any non-matching records will be returned to you after import.

Download Template

Accepts .csv, .xls, or .xlsx

Allow Exclusion Reason Creation

Allow overwrite

Close

Import

The titles of your sheet must have the following **exact column names**:

- DOI
- Title
- PubMed Id
- Exclusion Reason

- [Optional] Full Text Review

You must provide, in those columns:

- At least one bibliographic item (DOI, Title, or PubMed Id)
- For all Included records, a **blank cell** in the Exclusion Reason column
- For all Excluded records, the exact Exclusion Reason
- For all records that underwent Full Text Review, the text “TRUE” in the Full Text Review cell.

See below for a correctly-filled-out example sheet:

1	DOI	Title	PubMed Id	Exclusion Reason	Full Text Review
2	10.1212/0	Warfarin vs aspirin for symptom	17030766	Published Before 2014-01-01	
3	10.3389/fi	A visualized nomogram to online	36090848	Not an RCT	TRUE
4	10.1056/n	Endovascular Therapy for Stroke	34010530		TRUE
5	10.1159/0	A Case of Successful Intravenous	33505270	Case report or <5 patients	TRUE

In this sheet, the third record would be Included (with full text review) while the other three would have Exclusion Reasons added matching the text in that column.

## Settings: Allow Exclusion Reason Creation

The first setting (first red arrow above) determines whether the nest should automatically create new Exclusion Reasons based on the imported sheet.



If there is an Exclusion Reason listed in the sheet that is **not already configured in the nest**, leaving this setting toggled “on” will automatically create any missing reasons.

If you would prefer that **no new Exclusion Reasons be created** in your nest, toggle this setting off.



If there are any Exclusion Reasons that do not **exactly match** Exclusion Reasons in the nest, the import of records with those non-matching Reasons will fail import and a list of records that failed Screening import will be displayed to you.

## Settings: Allow overwrite

The second setting (second red arrow above) determines whether the decisions in your import should override decisions already present in the nest. That is, if you want any existing Exclusion Reason to be **replaced by the imported decisions**, leave this setting toggled “on.”

If you would prefer that **existing decisions be left (and not overwritten)**, toggle this setting off. If toggled off, no overwriting will be completed over existing decisions.



Be careful about this action, because no report will be returned regarding overwriting of records!

## Import Screening Decisions

Once you have **ensured that your import sheet is the proper format**, upload your sheet by drag-and-drop or by selecting the Upload button:

### Import Screening

Import final screening decisions for any records **already present** in the nest. Your sheet must contain 1 to 3 of the following columns for matching:

- Title
- DOI
- PubMed ID

Additionally, the sheet should contain columns:

- Exclusion Reason (required): If the record is to be excluded, a reason for exclusion; left empty to include the record.
- Full Text Review (optional): true/false, yes/no are acceptable, used to indicate if the screening decision was made using the full text. Empty values, or column not supplied, indicate that screening decisions did not result from a full text review.

**Import Screening:** Upload a .csv or .xlsx sheet to proceed. A spreadsheet of any non-matching records will be returned to you after import. [Download Template](#)

Accepts .csv, .xls, or .xlsx

☐ **Allow Exclusion Reason Creation**

☐ **Allow overwrite**

Close

Import

When complete, check your nest for the Screening Decisions you uploaded and to ensure that they were altered as you had planned.

## Import Tags

To import Tags, you will need to bring an Excel sheet or CSV formatted **exactly** as outlined below; you can use our template to ensure the formatting is correct.

Once you have selected “Begin,” a modal will open showing the ability to download the template, upload an Excel or CSV, and adjust settings:

## Format and Template

You can

### Import Tagging

Import tagging for any records **already present** in the nest. Your sheet must contain 1 to 3 of the following columns for matching:

- Title
- DOI
- PubMed ID

Additionally, the sheet should contain columns exactly (case-sensitive) matching tag names to import. Contents of tag columns should be the excerpts to attach; use a single period to denote a tag to apply without an excerpt. Leave cells empty to indicate that no tag should be applied.

**Import Tags:** Upload a .csv or .xlsx sheet to proceed. A spreadsheet of any non-matching records will be returned to you after import. [Download Template](#)

Accepts .csv, .xls, or .xlsx

Allow Tag Creation

Allow overwrite

Close

Import

The titles of your sheet must have the following **exact column names**:

- DOI
- Title
- PubMed Id

Then, every column to the right of these **must be an exact Tag name**; the cells under the Tag Name will indicate whether that Tag should be added to the record in question with the text in the cell as the Tag Excerpt.

You must provide, in those columns:

- At least one bibliographic item (DOI, Title, or PubMed Id)
- For all Tags to be applied to any record, the exact Tag name in the column header,
- For all records a Tag should be applied to, **fill in your desired Text Excerpt** in the cell. If the cell is left blank, **this indicates that the Tag in question should NOT be added to that record.**

See below for a correctly-filled-out example sheet:

	A	B	C	D	E
1	DOI	Title	PubMed ID	Study Type	Interventions
2	https://doi.org/10.1186/s13063-017-2396-4	Trial of Endovascular Treatment for Acute Ischemic Stroke	36239644	Randomized Controlled Trial: We conducted a multicenter, parallel, randomized controlled trial comparing endovascular treatment with standard medical therapy only in patients with acute ischemic stroke.	
3	https://doi.org/10.1186/s13063-017-2396-4	Trial of Thrombectomy 6 to 24 Hours after Ischemic Stroke	36239645	Randomized Controlled Trial: In a trial conducted in patients with acute ischemic stroke, we compared endovascular treatment with standard medical therapy only.	
4	https://doi.org/10.1186/s13063-017-2396-4	Endovascular Therapy for Acute Ischemic Stroke	34010530	Randomized Controlled Trial: We randomly assigned patients to endovascular treatment or standard medical therapy only.	Standard medical therapy only: A
5	https://doi.org/10.1186/s13063-017-2396-4	Endovascular treatment versus standard medical therapy for acute ischemic stroke	31831388	Randomized Controlled Trial: We did a multicenter, parallel, randomized controlled trial comparing endovascular treatment with standard medical therapy plus/minus	Endovascular therapy plus/minus

In this sheet, the first two records would have only one of the tags listed added to them; the last two records would have both tags added: “Study Type” and “Intervention.”

### Settings: Allow Tag Creation

The first setting (second red outline above) determines whether the nest should automatically create

new Tags based on the imported sheet.



If there is a Tag listed in the sheet that is **not already configured in the nest**, leaving this setting toggled “on” will automatically create any missing Tags.

These Tags will be added to your nest without Parent Tags, so make sure you check Configure Tagging and assign the appropriate Parent Tags after Import.

If you would prefer that **no new Tags be created** in your nest, toggle this setting off.



If there are any Tags that do not **exactly match** Tags in the nest, the import of records with those non-matching Tags will fail import and a list of records that failed Tag import will be displayed to you.

## Settings: Allow overwrite

The second setting (third red outline above) determines whether the tag excerpts in your import should override tag excerpts already present in the nest. That is, if you want any existing tag excerpts to be **replaced by the imported excerpts**, leave this setting toggled “on.”

If you would prefer that **existing tags be left (and not overwritten)**, toggle this setting off. If toggled off, no overwriting will be completed over existing tags.



Be careful about this action, because no report will be returned regarding overwriting of records!

## Import Tags

Once you have **ensured that your import sheet is the proper format**, upload your sheet by drag-and-drop or by selecting the Upload button:


### Import Tagging


Import tagging for any records **already present** in the nest. Your sheet must contain 1 to 3 of the following columns for matching:


- Title
- DOI
- PubMed ID

Additionally, the sheet should contain columns exactly (case-sensitive) matching tag names to import. Contents of tag columns should be the excerpts to attach; use a single period to denote a tag to apply without an excerpt. Leave cells empty to indicate that no tag should be applied.

**Import Screening:** Upload a .csv or .xlsx sheet to proceed. A spreadsheet of any non-matching records will be returned to you after import. [Download Template](#)



☐ Allow Tag Creation 

☐ Allow overwrite 

When complete, check your nest for the new Tags you uploaded and to ensure that they were altered as you had planned.

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