Import Existing Screening Decisions or Tags

This page addresses how to move existing review data, specifically screening & tagging, from spreadsheets into your nest. For video instructions, see T=2:37 in this video:

Where to Import

Import can be found under Settings.

- 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:

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

- DOI
- Title
- PubMed Id
- Ref Id (if applicable)
- External 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 (if using Ref ID, this would be an additional column):

	DOI	Title	PubMed Id	Exclusion Reason	Full Text Review
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 onlin	36090848	Not an RCT	TRUE
4	10.1056/n	Endovascular Therapy for Strok	34010530		TRUE
5	10.1159/0	A Case of Successful Intravenou	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.

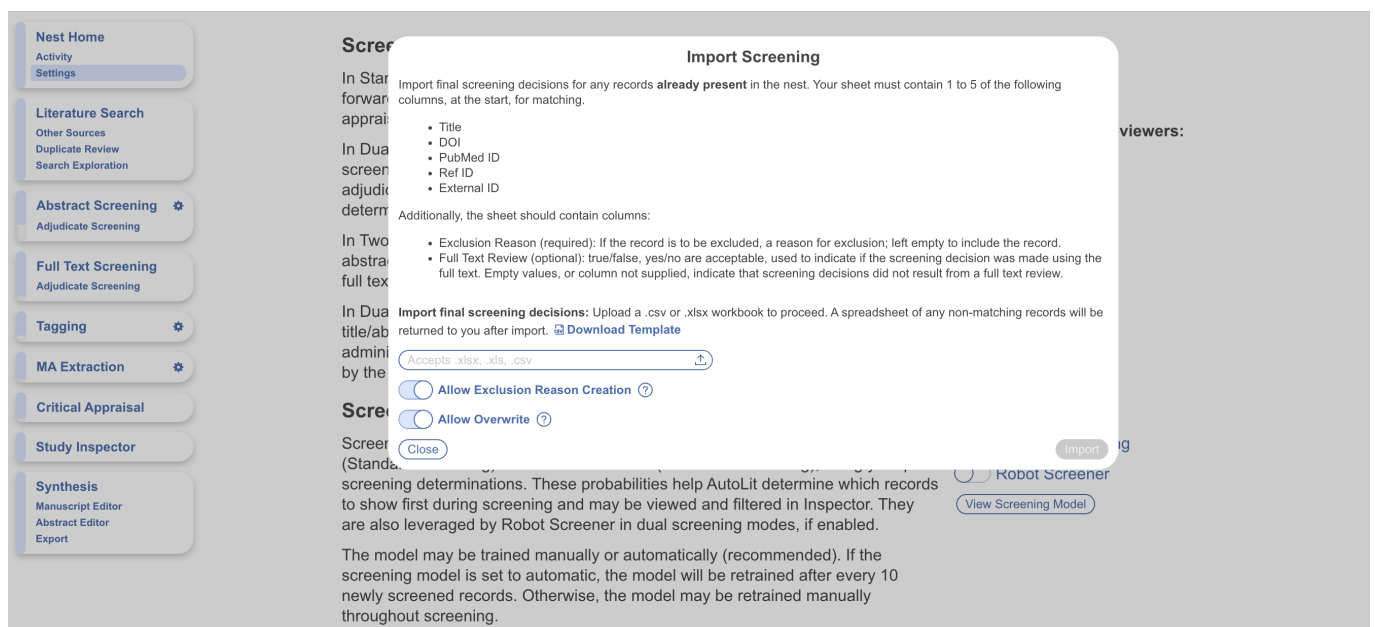When complete, check your nest for the Screening Decisions you uploaded and to ensure that they were altered as you had planned.

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

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

- DOI
- Title
- PubMed Id
- Ref Id (if applicable)
- External 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, PubMed Id and, if applicable, Ref 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 Content** 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 (if using Ref ID, this would be an additional column):

	A	B	C	D	E
1	DOI	Title	PubMed ID	Study Type	Interventions
2	https://dc	Trial of Endovascular Treat	36239644	Randomized Controlled Trial: We conducted a m	
3	https://dc	Trial of Thrombectomy 6 tc	36239645	Randomized Controlled Trial: In a trial conducted	
4	https://dc	Endovascular Therapy for §	34010530	Randomized Controlled Trial: We randomly assig	Standard medical therapy only: A
5	https://dc	Endovascular treatment ve	31831388	Randomized Controlled Trial: We did a multicent	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." The text added to each tag is found in the corresponding cell for each record.

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 Extraction 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.

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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