Organizational Templates

Through Organizational Templates, organizations can create and pre-populate sets of reusable content that can be adopted into an nest 'owned' by that organization.
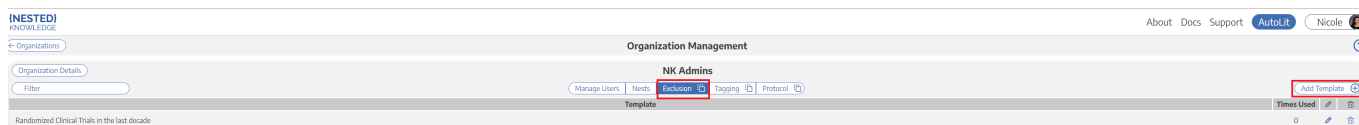
How Templates Work:

Templates are created by Organizational Owners and/or Admins. They are managed and edited from your Organizations page, and then can be used by any member to pre-populate content into any nest your Organization owns.

> ⚠️ Organizational Templates will ONLY be available in nests 'owned' by an Organization. To learn how to assign ownership of a nest to an Organization, see the Organization Management page.

How to add or edit Templates:

To create any type of Organizational Template, go to the Organization Management page, and select the appropriate header under your Organization's name (either Exclusion, Tagging, or Protocol):

To add a template, press the "Add Template" button and type in a new Template Name, and then confirm by clicking "Add".

To edit a template, click on the title of the template in the list. To edit the title of the template, select the pencil icon in the column to the right of the Template titles.
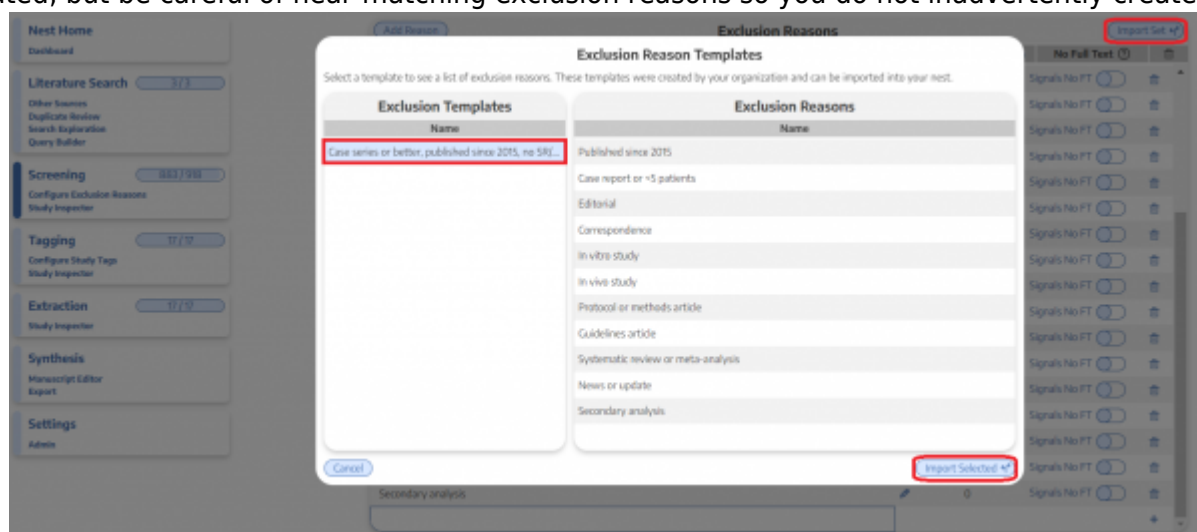
Types of Templates:

1. Exclusion Reason Sets

Exclusion Reason Sets are groups of commonly-used Exclusion Reasons that can be bulk-configured in your Organization's nests. This means that you can replicate, in part or in whole, the same lists of Exclusion Reasons across nests. Any list you pre-populate as an Exclusion Reason Set will be available for adding to any nest owned by your Organization.

To use an Exclusion Reason Set, go to the Configure Exclusion Reasons page in your nest, and select "Import Set." Choose a set, and click "Import Selected." This will populate all exclusion reasons in the

set to your nest. If an exactly matching exclusion reason has been populated previously, no duplicate will be created, but be careful of near-matching exclusion reasons so you do not inadvertently create

duplicates!

2. Tagging Hierarchy Templates

To create a Tagging Hierarchy Template, build a new hierarchy in the Configuration panel that opens when you add a Template (or click an existing Template's title). You can also view a list of the hierarchies used in your Organization's nests, and pre-populate the whole hierarchy, or any node and its descendants, into your Template.

To use a Tagging Hierarchy Template in a nest owned by your Organization, go to the Configure Tagging Hierarchy page, and select "Import Template." Choose a template and pick to import either the whole Template or any node and its descendants.

3. Protocols

Protocol templates can be drafted in a free-text page, where you create the headings, text sections, and/or tables that can be imported into any of your Organization's nests. For instance, a biomedical network meta-analysis protocol template could present headings and sample text describing search strategy, inclusion criteria, populations, interventions/comparators, and outcomes (PICO) of interest, and statistical methods.

To use a Protocol Template, go to the Nest Protocol page and select "Import Template." Choose a protocol template from the list.