

Configuring and Editing the Tag Hierarchy

For each nest, you need to configure a Tag Hierarchy before tagging that nest's records. Tag Hierarchies structure the qualitative content that you tag, and [Qualitative Synthesis](#) uses the Tag Hierarchy as the basis for its structure.

To configure a hierarchy for your nest, follow the steps below. Once you have built the hierarchy, you can move on to [tagging records](#) you have included in your nest.

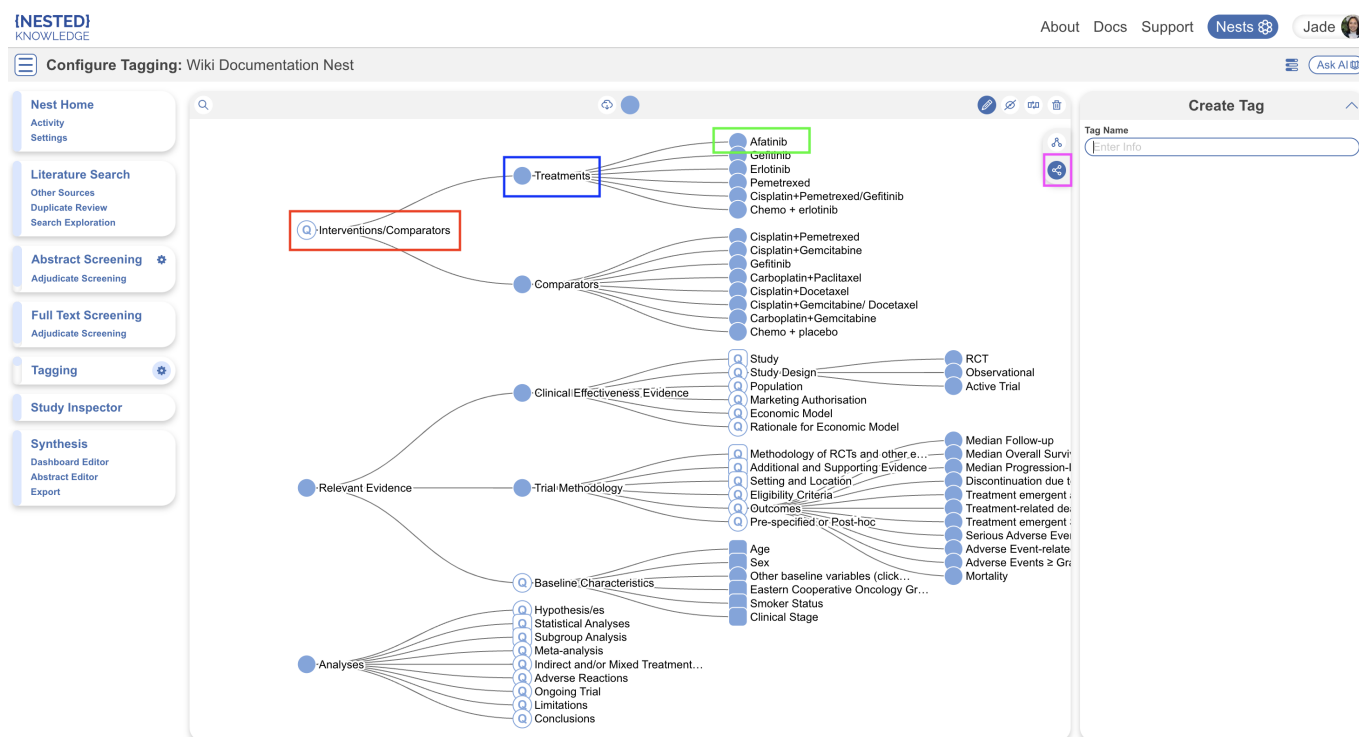
Before Tag Hierarchy configuration, consider the mode you would like to use. By default, your nest has **Form-based Tagging** mode on, allowing you to configure questions and answers to be extracted in a form.

Alternatively, you can switch to **Standard** mode, which is less structured and allows you to configure concepts to be extracted via a list of dropdown tags. Follow [these instructions on configuring tags in Standard Tagging mode](#). Note: switching between modes results in no loss of data.

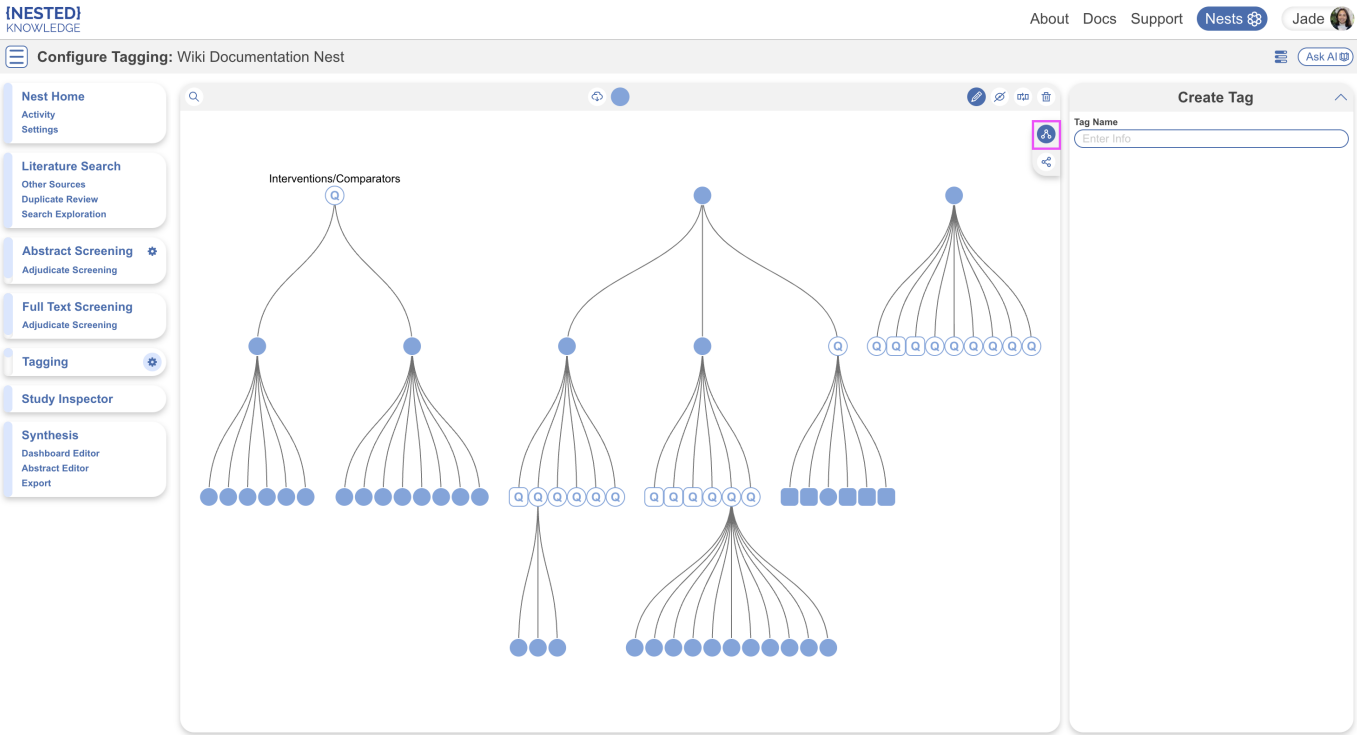
Understanding Tags in the Hierarchy

Root Tags are the highest level of the hierarchy, and have no parent tags.

Parent tags are any tags that have child tags. In the below example, "Interventions" (red) is a root tag (the highest/left-most level), "Treatments" (blue) is a parent tag to "Afatinib" (but not a root tag), and "Afatinib" (green) is a child tag (but not a parent or root tag). That said, don't worry too much about the jargon, these ontologies are simply supposed to represent the most general categories at the top, and most specific at the bottom.



By default, the “left-to-right” configuration is presented (pink) to best display tag names. If you prefer “top-to-bottom” configuration, select the hierarchy icon above.



Configure Study Tags as Questions & Answers

1. Navigate to Configure Tags

Click on the gears icon in the Tagging tab:

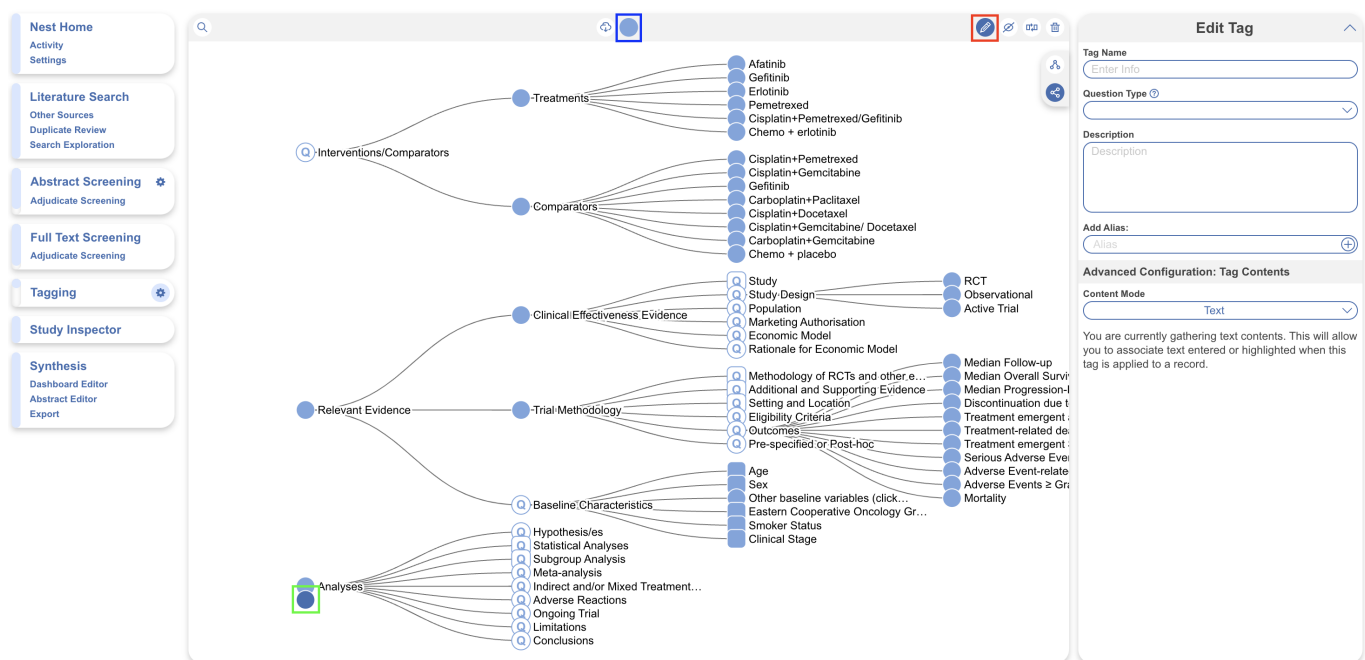


This will bring you to the Tag Hierarchy, which will be blank until you have added tags.

2. Configure Tag Questions

To draft Questions, you need to build out the Tags in your Tagging Hierarchy. You should keep in mind what tags will be Questions and which will be answers. To create a tag, ensure the pencil icon is toggled (circled in red; it typically is selected by default), then either click the blue tag icon (circled in dark blue) and a tag will be added as a new root tag to the hierarchy (circled in green) or you can

drag and drop the same blue tag icon to place a tag in your desired position. Tag position can be altered any time by selecting, dragging and dropping the tag.



Alternatively, if the pencil icon is toggled, you have the option to quickly create a tag by inputting its name and hitting Enter on the keyboard, and coming back to edit details later on.

After creating the tag, you can fill in the details on the right-hand side under “Edit Tag” (circled in red below). First, give the tag a name. For example “Interventions/Comparators.” Any inputted information is auto-saved.

You then have the following options for Question types:

- **Single Apply:** Open-ended question type where only a text box is shown, answering the question applies the tag, indicating the concept is present.
- **Single Select:** All child tags will be shown as an option where only a single answer can be selected,
- **Multi-Select:** All child tags will be shown as an option where multiple answers can be selected, or

Generally, it is best to add a full/descriptive question (such as, if you had a tag called Study Design, type out the question “What was the study design of the article?” in the Question box).

Edit Tag

Tag Name: Study Design

Question Type: Single Select

Question: What was the study design of the article?

Add Alias: Alias

Advanced Configuration: Tag Contents

Content Mode: Text

You are currently gathering text contents. This will allow you to associate text entered or highlighted when this tag is applied to a record.

3. Configure Tag Answers

Single Apply questions do not require child tag answers but for Single Select and Multiple Select Questions, they require child tag answers to work. To create child tags, drag and drop the new tag icon under your desired parent tag. This time, input the answer as the Tag Name, leave the question type blank, add a description if applicable.

Edit Tag

Tag Name: Randomized Controlled Trial

Question Type:

Description: Description

Add Alias: Alias

Advanced Configuration: Tag Contents

Content Mode: Text

You are currently gathering text contents. This will allow you to associate text entered or highlighted when this tag is applied to a record.

Example Questions of each type

Example Single Select question:

- **Tag Name:** Study Type
- **Question:** What was the Study Type?

- **Answers (child tags):** Randomized Controlled Trial, Prospective Cohort Study, Retrospective Study

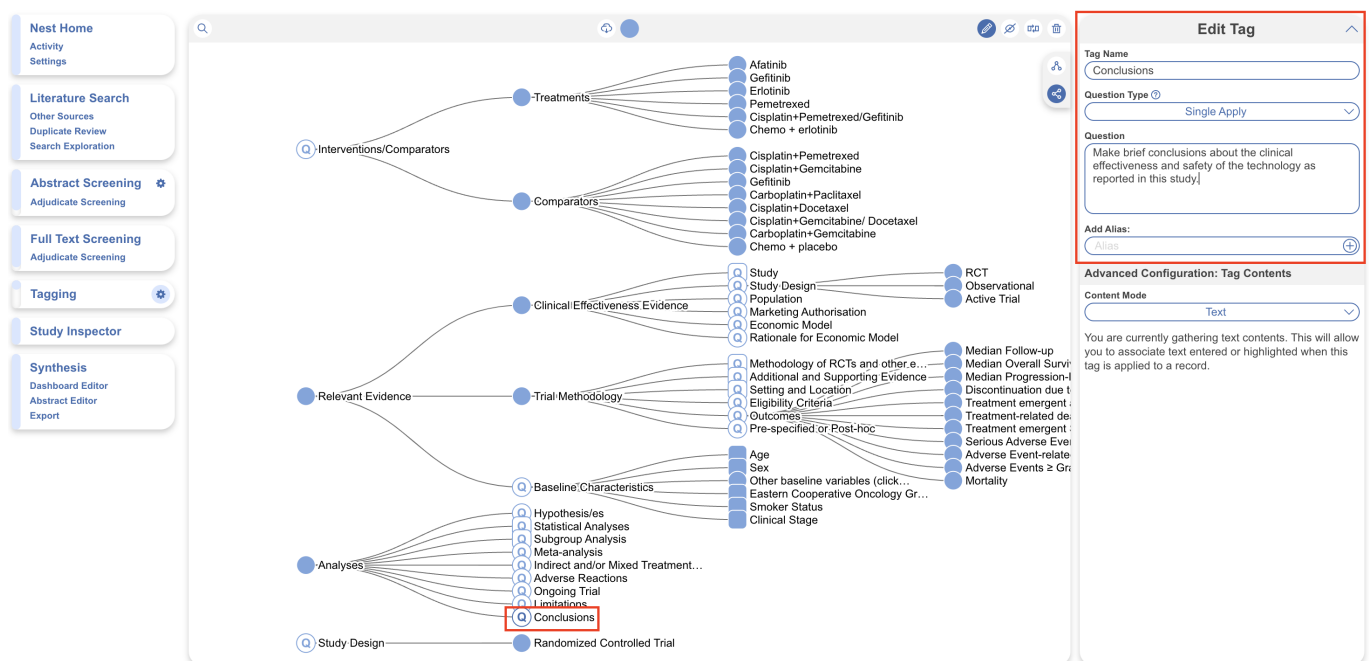
Example Multi-Select question:

- **Tag Name:** Comorbidities
- **Question:** What comorbidities were reported in the patient population?
- **Answers (child tags):** Diabetes, Hypertension, Chronic Kidney Disease

Example Single Apply question:

- **Tag Name:** Study Objective
- **Question:** What was the study objective reported?
- **Answer** (not child tags, the answer will be reflected by the tag text): Tag Text/Excerpt from the underlying study. Absence of an answer means the Tag is not present in the study.

To reiterate, single apply questions do not have child tags:



Tips on Preliminary Hierarchy Organization

Every Question that you create will be presented to users [during the Tagging stage](#), in order of top to bottom in the hierarchy, or left to right in the alternate configuration. Simply drag and drop tags to reorder; dragging a parent tag will also move its child tags accordingly. In addition, due to the flexibility of tags, it can be helpful to create root and parent tags to organize your configured questions.

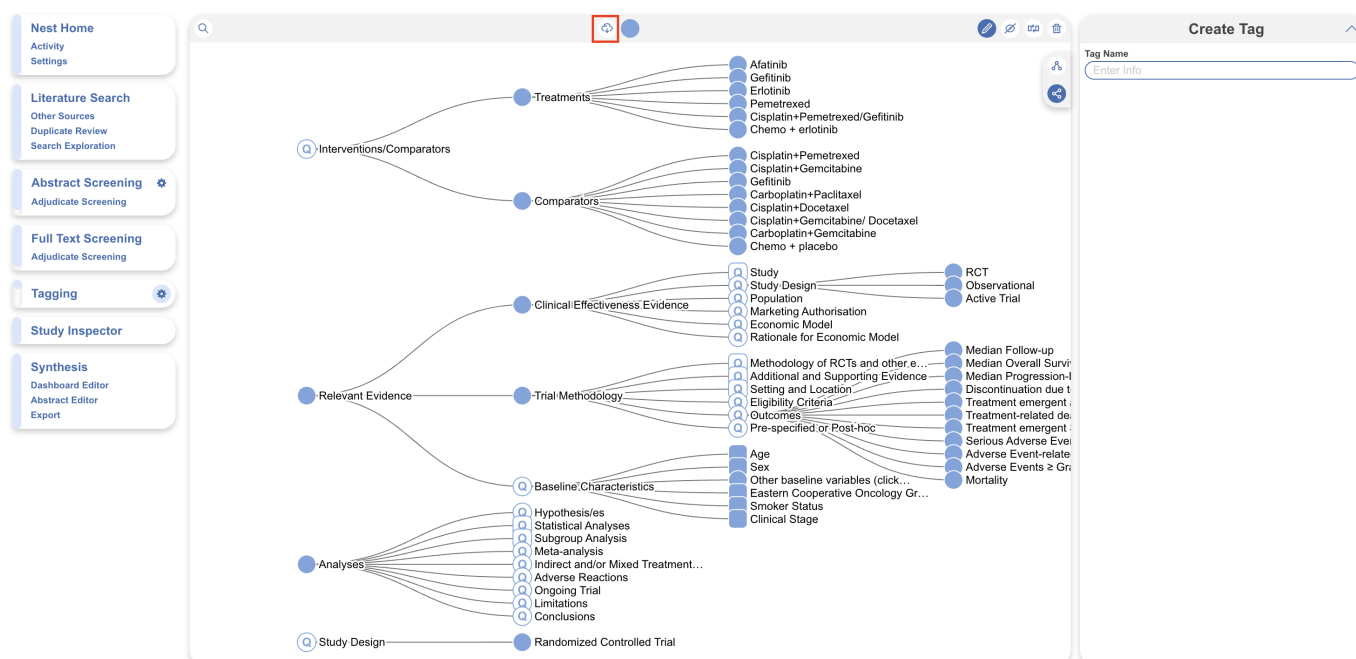
Regarding Advanced Configuration: Tag Contents, all tags have “Text” contents associated by default. This means when the tag is applied, data can be extracted in the form of a text box. If you're just starting out, it's fine to keep tags with text contents. As you get more comfortable, you might consider exploring table contents or options. [See more on Tag contents below.](#)

Import a Tag Hierarchy Template

When creating a hierarchy from scratch it can be helpful to use a template. You can either import one of our public templates or a pre-built template that belongs to your organization.

1. Select the Import Hierarchy Icon

From the Configure Tagging page, and the create tags/pencil icon already toggled, select the cloud-like import hierarchy icon (circled in red below), next to the new tag icon.



2. Choose a Tag Hierarchy Template

When importing a tag hierarchy, you have the option to import:

1. From your organization's configured templates
2. From Nested Knowledge's public templates

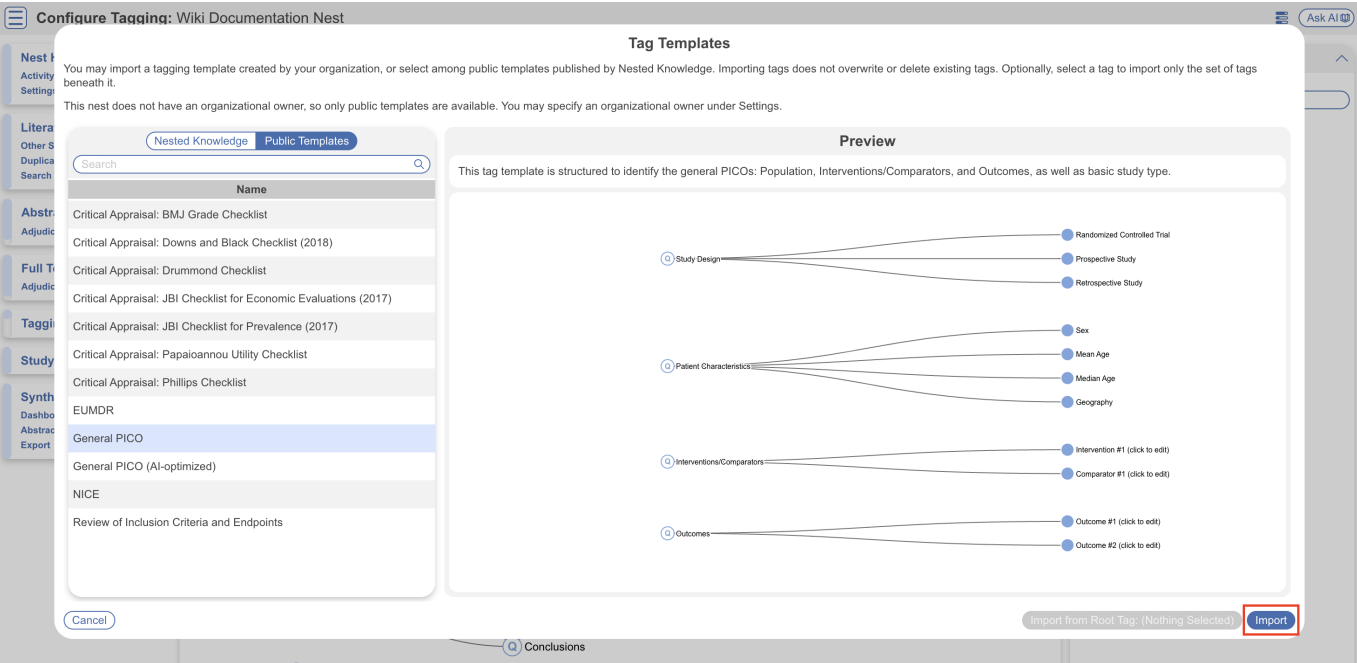
If you are not yet part of an organization, this tab will be disabled but you will still be able to access the Public Templates. See a step-by-step on how to import tag templates [here](#).

How to Build a Tag Hierarchy Template

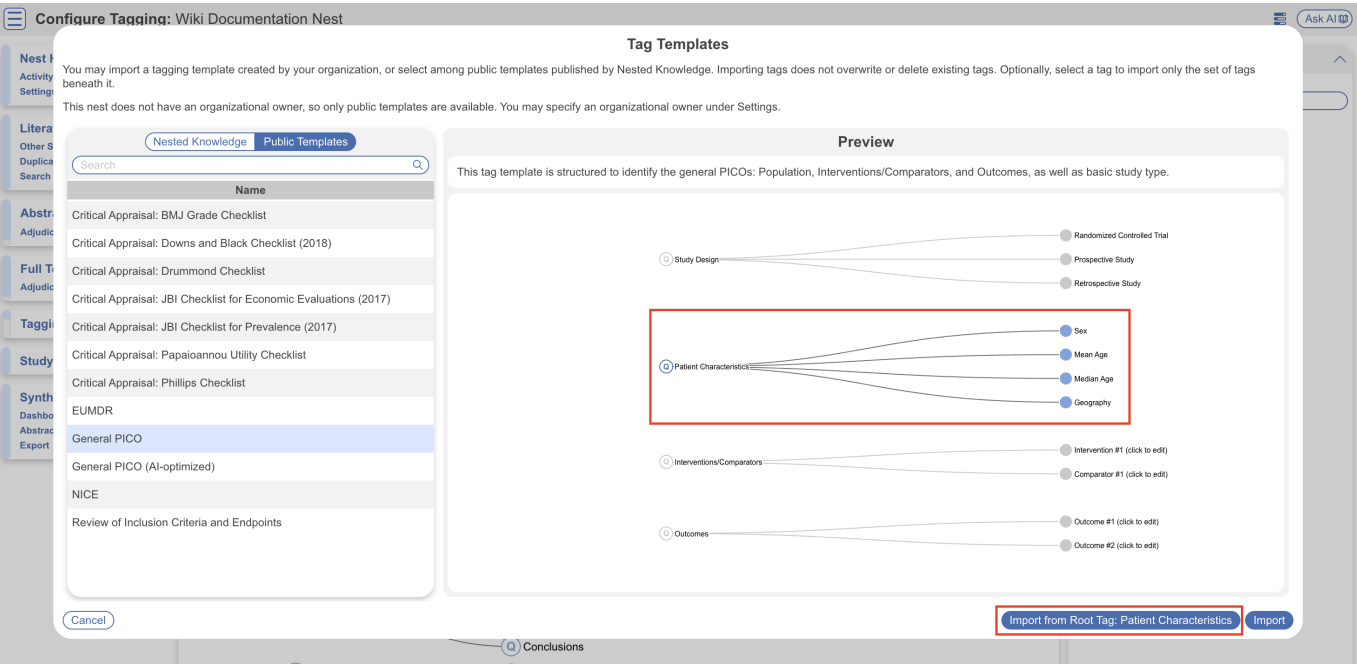
If you are part of an organization and would like to learn how to build a Tag Hierarchy Template for your Organization, which can then be used for import, click [here](#).

3. Import a Hierarchy or Root Tag

From the available templates, you can decide if you want to import the entire hierarchy or only one Root Tag and its children. For the whole hierarchy, select the listed template, e.g. “General PICO”, you'll see a preview and click “Import.”



To select only one Root Tag and its children, select the Root Tag e.g. “Patient Characteristics”, the preview is highlighted and then click “Import from Root Tag.” There is no limit on how many templates (or parts of templates) that may be imported.



Note: If tags are already present in your Hierarchy, the imported hierarchy will be added to the bottom of the existing Root Tags.

Editing the Tag Hierarchy

After you've begun Tagging, you may want to edit the tags you have created. Here are the edit functions that are available on the Configure Tagging page:



The fewer tags you create, the easier it will be to tag underlying studies. Only create the tags that are essential to your Qualitative Synthesis!

Tag Details

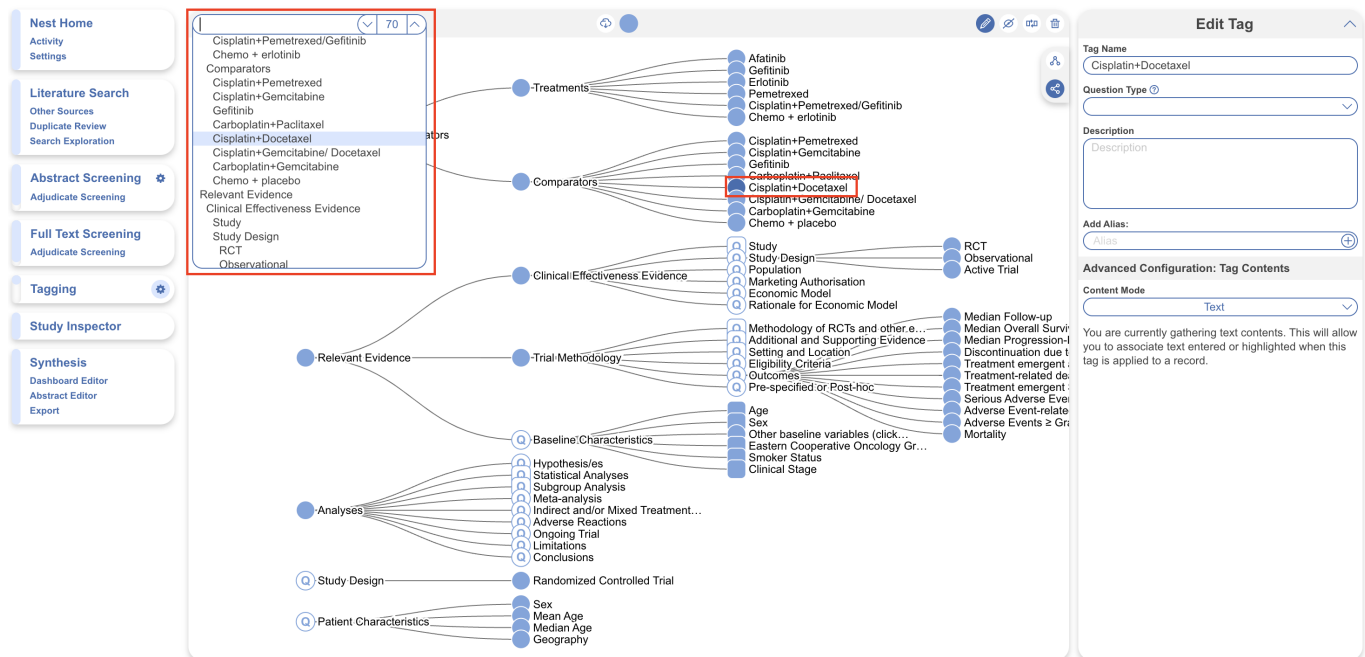
To edit a Tag's details, ensure the pencil icon is selected and select the tag you wish to edit. The tag's details will be shown on the right hand side where you can edit:

- Tag Name
- Question Type
- Description/Question
- Aliases

The screenshot displays the Autolit Tagging interface. On the left is a sidebar with navigation options: Nest Home, Literature Search, Abstract Screening, Full Text Screening, Tagging (selected), Study Inspector, and Synthesis. The main area shows a hierarchical tree of tags. The 'Relevant Evidence' branch is expanded, showing 'Interventions/Comparators', 'Clinical Effectiveness Evidence', and 'Trial Methodology'. The 'Trial Methodology' branch is further expanded, showing 'Baseline Characteristics' (highlighted with a red box), 'Hypothesis/ies', 'Statistical Analyses', 'Subgroup Analysis', 'Meta-analysis', 'Indirect and/or Mixed Treatment...', 'Adverse Reactions', 'Ongoing Trial', 'Limitations', and 'Conclusions'. The 'Baseline Characteristics' tag is selected, and the 'Edit Tag' panel is open on the right. The panel contains fields for Tag Name (Baseline Characteristics), Question Type (Multiple Select), Question (Provide a summary of the baseline characteristics of trial participants.), Add Alias (Alias), and Advanced Configuration: Tag Contents (Content Mode: Text). A note at the bottom of the panel states: 'You are currently gathering text contents. This will allow you to associate text entered or highlighted when this tag is applied to a record.'

This change is auto-saved and will be applied across all studies in the Nest with that tag.

If you need assistance searching for your desired tag, use the Search icon in the top left to select the tag.



Reorder Tags

If you would like to reorder the positioning of tags underneath the parent tag, simply click on the tag you would like to reorder and drag and drop it to its new destination. The new ordering will be reflected in the Tagging module (specifically the order of questions shown in the form) Exports, and Synthesis.

Reordering tags is useful for general organization of the hierarchy, which is reflected in NK outputs, as well as order of questions that appear in Tagging.

Advanced Configuration: Tag Contents

When a tag is created, you have the choice of tag content and the choice to toggle on options for your chosen content. The default setting for content mode is Text, meaning when the tag is applied, free text can be inputted alongside.

Content Mode: Text vs Tables vs Options

In short, if you would like to collect data in the form of simple text only, leave the content mode as text. If you'd like to collect data as a table for a specific tag, select the table content mode and configure custom columns. If you'd like to collect data from pre-configured options with no accompanying text, select options content mode and configure custom options.

Learn more about [configuring tag tables](#) and [configuring options](#).

The screenshot displays the AutoLit tagging configuration interface. On the left, a sidebar contains navigation links: Nest Home, Literature Search, Abstract Screening, Full Text Screening, Tagging, Study Inspector, and Synthesis. The main area shows a hierarchical tree of tags. The 'Analyses' tag is highlighted with a red circle. The 'Edit Tag' panel on the right shows the configuration for the 'Randomized Controlled Trial' tag, with the 'Advanced Configuration: Tag Contents' section highlighted by a red box.

Hide Tags

If you have tags present in your hierarchy that you do not want shown in Synthesis (e.g. if they are used for admin/organizational purposes) you can hide them. They will **only** be hidden in Synthesis and still accessible to use everywhere else in AutoLit. To hide a tag, first select the “Hide” icon (circled in red) and click on the tag. Selecting a parent tag will also hide its child tags (circled example in dark blue), you may select multiple tags at once to hide.

This will alter the shape of the tag to differentiate between present and hidden tags in Synthesis. Nothing else changes, and toggling back and forth is non-destructive; no data is changed in the process.

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Merge Tags

If you would like to combine multiple tags into one tag, select the “Merge” icon (circled in red) and on the right hand side you will be given two dropdowns to select the tags you'd like to merge (dark blue). The “Source” tag is the one getting merged into the “Target” tag, so the Target tag's position is maintained after merging.

The screenshot displays the Tag Hierarchy configuration interface. On the left is a sidebar with navigation options: Nest Home, Activity, Settings, Literature Search, Abstract Screening, Full Text Screening, Tagging, Study Inspector, and Synthesis. The main area shows a hierarchical tree of tags. A red circle highlights the 'Merge' icon in the top right corner. A 'Merge Tag' dialog box is open on the right, showing 'Source' as 'Mean Age' and 'Target' as 'Age'. A warning message states: 'Warning: By merging Mean Age into Age' followed by two bullet points: '0 study-applied Tag(s) will be updated to Age' and '0 arm Intervention(s) will be updated and 0 arm(s) deleted'. The dialog has 'Cancel' and 'Merge' buttons.

Why would you Merge tags? Either because they are duplicates or because they are concepts you would like to combine. In the above example, data collected for Mean Age is being merged into a general Age tag.

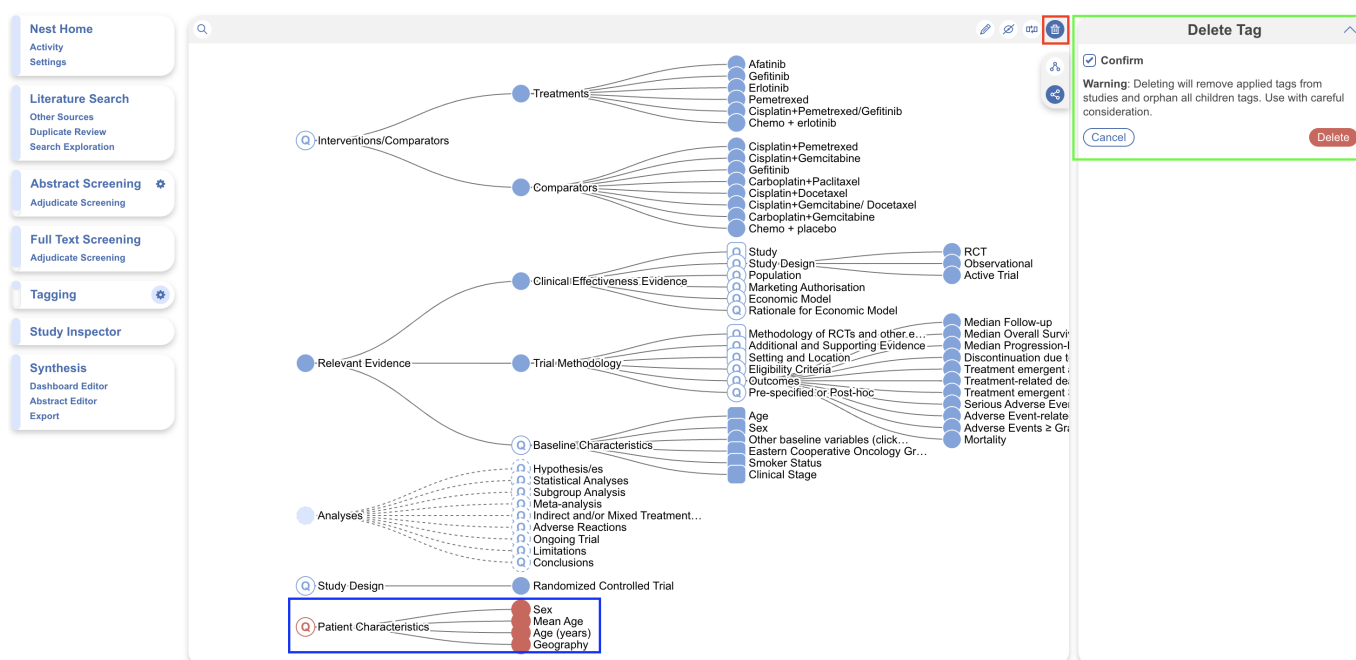
Delete Tags

Navigate to the “Bin” icon (circled in red), select the tags you'd like to delete which will turn red (circled below in dark blue) and hit the “Confirm” checkbox and “Delete” (circled below in green). **When a tag is deleted in Configure Tagging, it deletes the tag from the hierarchy and from all studies it has been applied to.**

Be careful deleting parent tags (tags with child tags) because the child tags will be reverted to Root Tags/moved to the bottom of the hierarchy.



Deleting tags cannot be undone, so do not delete a tag unless you are certain you do not need it!



Add Tags on the Fly

If you forget to configure a tag before beginning the Tagging process, no problem! You can add tags to your hierarchy 'on the fly'; to learn how, click [here](#).

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<https://3.22.156.197/doku.php?id=wiki:autolit:tagging:configure>

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