Nest Settings

The Settings page allows you to create and edit a nest description and nest protocol, as well as manage User Keywords. **Only the Owner and Admins of a nest** can view its Settings page.

Navigate to the Settings Page

The Settings page is found in the top left of the page, underneath Nest Home and Activity. This link will only appear to the Owner and Admins in the nest; Settings are hidden from Users.

1. Add and Manage Admins, Users, and Organizations

Add or remove User and/or Admin privileges for individuals and access and/or Ownership for Organizations in your specific nest. To learn how to do so for individuals or organizations, see the Manage Access page.

Note: Nest-level Admin functions are separate from Organization-level Admin functions.

- For Organization-level Admin functions, see Manage Organizations.
- **Exception:** if you are giving an Organization access to or ownership of a nest, that is a Nest-level Admin function; see the Manage Access page.

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2. Synthesis

From the Synthesis section, you can toggle 'on' or 'off' any Synthesis page:

- **Toggle on or off** Quantitative Synthesis, Qualitative Synthesis, Dashboard, Manuscript, Critical Appraisal, or PRISMA. If toggled off, that specific subsection will be greyed out in the Synthesis homepage.

Adjust the privacy/publicity of your Synthesis page to be Public, Protected, or Private:

- **Make a nest public.** Toggle this on to make the link to your Synthesis page (and all sub-pages) publicly viewable.
- **Make a nest protected.** Toggle this on to make the link to Synthesis undiscoverable and inaccessible to those without the key (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.
- **Make a nest private.** Toggle this on for the most protection. Only those explicitly granted access with a NK account will be able to view the Synthesis.

Synthesis

Synthesis outputs are generated in part by the actions taken in AutoLit. Turning on these outputs will allow you to visualize and share tags and gathered data.

Choose which outputs to display:

- Qualitative Synthesis
- Quantitative Synthesis
- Manuscript
- Dashboard
- Critical Appraisal
- PRISMA Diagram

Nest Access

Making this nest public will allow anyone on the internet to search for and see your nest's Synthesis. This does not grant the public editing access via AutoLit.

Making this nest protected will add a secret key to its Synthesis URLs, making them undiscoverable and inaccessible to those without the key (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.

Nest Access:

- **Public**
- **Protected** [Expire & Regenerate Key]
- **Private**

Current Link to Synthesis:

[https://nested-knowledge.com/nest/3061]

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 ⬆]

3. Screening

Screening Modes: Standard vs. Dual vs. Two-Pass Screening

As an Admin, you can configure the Screening Mode to be:

- Standard (default),
- Dual Screening,
- Two-Pass Screening,
- Dual, two-pass Screening, or optionally,
- If you use Dual Mode, you can also employ Guidance on Robot Screener in Dual Two Pass Mode!

Standard Screening means that each record will be screened by one user in a single session. The user will have the option of designating "Full Text Review", but there is no separate Full Text step.

Dual Screening means that each record will be screened by two different users and adjudicated by a third.

Two-Pass Screening means that each record will be screened at the Abstract level by one user, and advanced to a second, separate Full Text screening step, where the record must have a full text PDF uploaded and a final Screening decision made by a single user.

Dual Two-Pass Screening combines these functions, meaning each record is screened by two different users and adjudicated at the Abstract step, and then two users must screen at the Full Text step followed by adjudication.

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.

Choose Mode:
- ⦿ Standard
- ◯ Two Pass

Choose number of reviewers:
- ⦿ Single
- ◯ Dual

Screening Model

Screening models predict the probability of individual records being included (Standard Screening) or abstract advanced (Two Pass Screening), using your past screening determinations. These probabilities help AutoLit determine which records to show first during screening and may be viewed and filtered in Inspector. They are also leveraged by Robot Screener in dual screening modes, if enabled.

The model may be trained manually or automatically (recommended). If the screening model is set to automatic, the model will be retrained after every 10 newly screened records. Otherwise, the model may be retrained manually throughout screening.

Choose mode:

◯ Automatic Training

[View Screening 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. Records will still be ordered by inclusion probability, even when hidden. To completely remove probabilities and ordering, delete the existing screening model and turn off automatic training.

Choose:

◯ Hide Probabilities

Import

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

Upload data:

[Begin]

⚠️ Toggling between Standard, Two-Pass, and Dual Screening (see image) **can lead to loss of data**, as only the final Inclusion and Exclusion decisions will be saved if you switch between Screening Modes!

Screening Model

Manual vs. Automatic: By default, the Screening Model will be on Manual, meaning that it will only run when a user selects Train Screening Model during the Screening process. Toggling the Screening Model on (see image above) will alter this so that the Model runs as soon as a sufficient number of studies are screened, and this Model will be re-run automatically as more screening occurs. In the image below, if manual the red box will say "Train Screening Model," and if automatic training is on and enough studies are screened, the inclusion probability will be provided– in this case it is

"P(Inclusion): 0.87."

Displayed vs. Hidden: By default, the Screening Model will be displayed, meaning that any user will be able to see the probabilities on the Screening panel:

If you want this probability to be hidden from all users, Admins, and Owners on each individual study, toggle "Hide Probabilities." If hidden, you can still run the model from the Admin page and have the option to turn on Automatic updating. Learn more about the Screening model here.

Import Existing Screening Decisions

If there are screening decisions from a previous nest that are relevant to your current nest, you can import existing screening decisions for any record already in your nest by uploading a spreadsheet. To do this, under Screening on the Settings page, selecting "Begin" under Import.

4. Tagging

Tagging can be completed in Standard mode, or you can turn on Form-based Mode:

Tagging

In Standard tagging, the entire tagging hierarchy is made available as an open-ended list.

In Form-based tagging, tags can be turned into questions to be posed to the reviewer. There are three types of questions: Single Apply questions apply the tag selected, Single Select questions allow for only one of the child tags to be applied and Multiple Select questions allow for multiple child tags to be applied. All tags may have text text content. Switching between these modes results in no loss of data.

Choose mode:

◉ Standard
◯ Form-based

Tag Recommendations

Smart tag recommendations use GPT 4, a large language model from OpenAI, to provide automatic highlighting of full texts based on your configured tags. Standard recommendations use keyword lookup.

Tag recommendations may be shown on the abstract level, in addition to the default full-text level.

Choose type:

◯ Standard
◉ Smart BETA
[Regenerate Recommendations]

◯ Abstract Tag Recommendations

Import

Import existing tagging data for any record already in your nest by uploading a spreadsheet.

Upload data:

[Begin]

In this mode, you will need to set up Questions in your tag hierarchy that are answered for each study.

Tag Recommendations

Standard tag recommendations are available to all users to assist in the Tagging process. Smart Tag recommendations are only available to enterprise users, but utilize OpenAI GPT 3.5/4 to search Abstracts and Full Texts. Toggling on "Smart (Beta)" will automatically generate recommendations for any included studies with available full texts. This will run in the background.

You have a limited number of regenerations due to the costliness of each generation. After full text smart recommendations are generated, and for further assistance, you have the option to also generate smart tag recommendations for included abstracts. Learn more about Tag Recommendations.

Import Existing Tags

If there are tags from a previous nest that are relevant to your current nest, you can import existing tags for any record already in your nest by uploading a spreadsheet. To do this, under Tagging on the Settings page, selecting "Begin" under Import.

5. Meta-Analytical Extraction (previously named Extraction)

MA Extraction Modes: Standard vs. Dual

As an Admin, you can configure the Meta-Analytical Extraction Mode to be:

- Standard (default)
- Dual MA Extraction

Standard MA Extraction means that each record will be extracted for quantitative data only once.

Dual MA Extraction means that each record will be extracted by two different users and adjudicated by a third. To toggle Dual MA Extraction 'on', select it in the Admin page:

Meta-Analytical Extraction

Checking this box will make the Meta-Analytical Extraction module available in AutoLit, allowing you to extract descriptive statistics for Meta-Analysis and Quantitative Synthesis

Choose whether to extract meta-analytical data:

Meta-Analytical Data Extraction

Single vs. Dual MA Extraction

In Standard Meta-Analytical Extraction, one user extracts each study and that data is considered final. Another user may review or modify final data, but the data is not subject to systematic independent confirmation.

In Dual Meta-Analytical Extraction, two users independently extract each study and all data are reviewed by an administrator. The administrator adjudicates disagreements between the original reviewers and generates the final data set.

Choose number of reviewers:

- Single
- Dual

6. Critical Appraisal (previously named Risk of Bias)

Choose a Critical Appraisal system. Learn more about Configuring Critical Appraisal

Risk of Bias

Risk of Bias allows you to grade the quality & trustworthiness of evidence in your Nest. A Risk of Bias system (also called a "tool") is comprised of a series of questions that are answered for each included study. Select a system to enable Risk of Bias in your Nest.

Some systems allow you evaluate the risk of bias of entire studies or individual outcomes.

Choose a System:

System: SIGN 50, Version: 2011

None
System: SIGN 50, Version: 2011
System: Cochrane RoB, Version: 2
System: JBI, Version: 2020

Individual Outcomes

7. Blinding

To avoid bias in your review where multiple reviewers are participating, you may want to consider blinding certain aspects of the process. The Blinding settings allow you turn off or hide features.

Blind Adjudication allows you hide the reviewer's identity for each decision as to not influence the ultimate decision. For example:

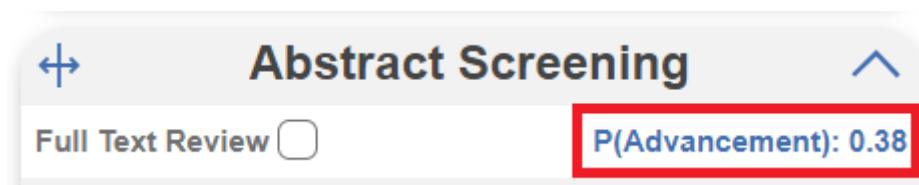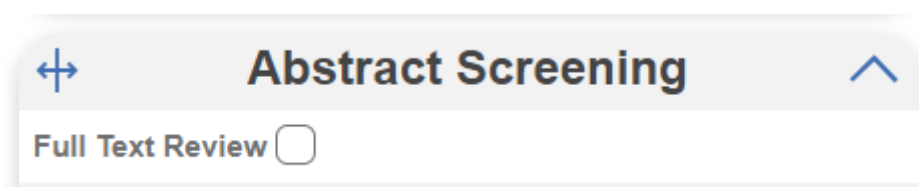Adjudicate Screening before Blinding:
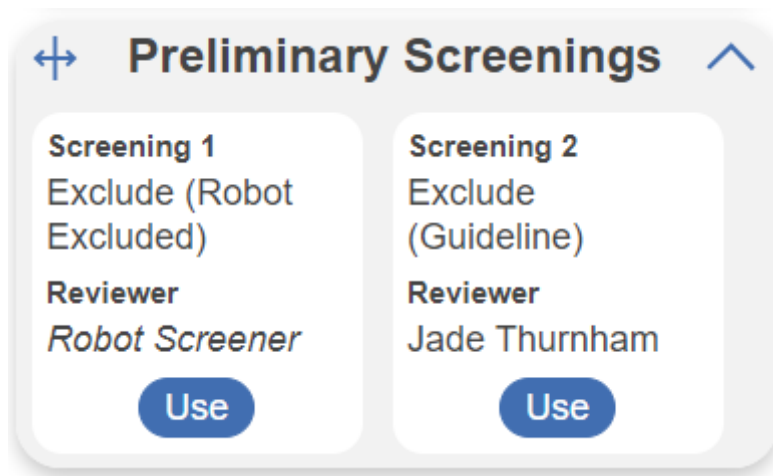
After Blinding:
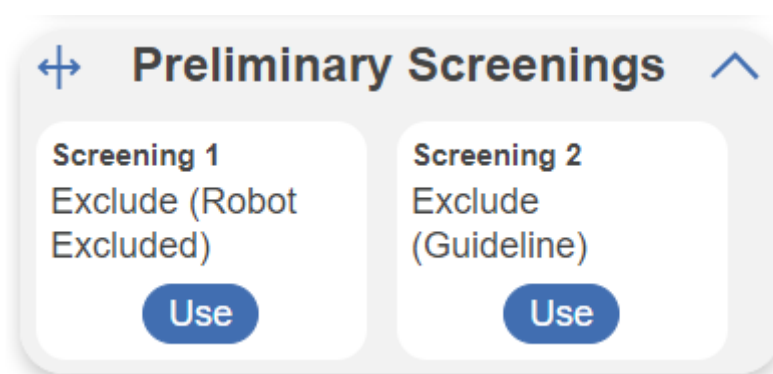
Hiding Inclusion Model allows you to remove the inclusion probability for each study if turned on, so the reviewer can make a completely independent decision.

Screening before hiding probabilities:


After hiding probabilities:

Hiding Comments removes the Comments tab in the workflow modules (Screening, Tagging, MA Extraction, Critical Appraisal), allowing you to hide any comments made on studies when viewing them. As a result comments can't directly be made as they appear in the queue but can be made and seen when the study is accessed in Study Inspector.

Right hand side tabs before hiding comments:
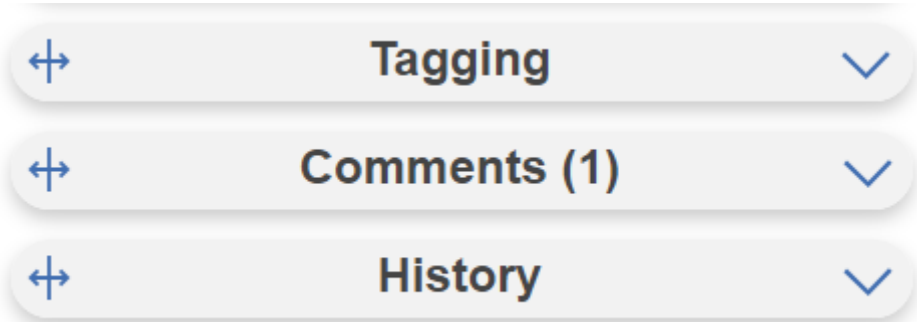
After hiding comments:
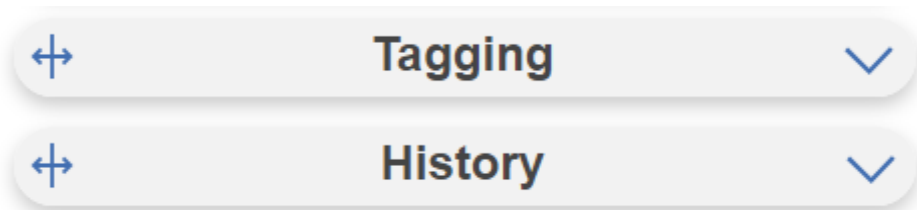
Hiding Tagging During Screening removes the Tagging tab available as you screen. We offer this capability during screening to be able to apply preliminary tags, but similarly it also exposes users to bias after a previous reviewer has screened and tagged. The before and after mirrors the above Comments removal but for the Tagging tab instead in Screening alone.

8. Copying, Renaming, or Deleting a Nest

Copying a nest will copy the data and configurations, such as the search terms, references, exclusion reasons, the tagging hierarchy, applied tags, data elements, full-text PDFs, Critical Appraisal systems, the protocol and manuscript, and other configurations. The copied nest is entirely independent of the original nest. Access privileges will not be copied from the old nest and must be configured.

Only Owners have the right to delete a nest. "Delete" can be found next to "Rename"; deleting a nest is irreversible and will completely delete all data related to the project in question!

Enterprise-level Features

These features are only available to admins within an organization subscribed at the Enterprise level.

1. Allocation

Allocation allows you to assign work in specific modules to various members of your team. Learn more about Allocation.

2. Nest Backups

Nest Backups allow you to manually save up a backup of your nest to capture a version of it at a specific date and time. Learn more about Nest Backups.