

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:



Video

Where to Import

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

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Screening

In Standard Screening, one user screens each record. Inclusion sends the record forward for gathering, such as tagging, meta-analytical extraction, and critical appraisal. 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.

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.

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

☐ Robot Screener

[View Screening Model](#)

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](#).

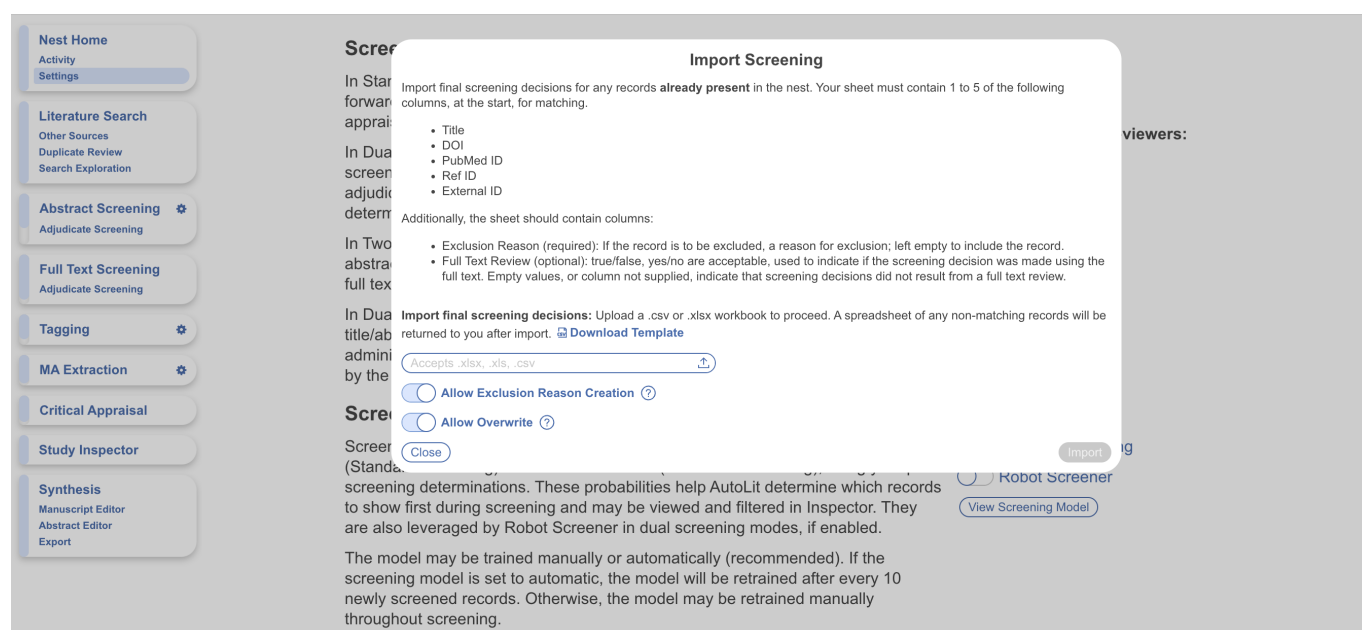
Import Screening Decisions

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:



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):

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.

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):

Import Tagging

Import tagging for any records **already present** in the nest. Your sheet must contain 1 to 4 of the following columns, at the start, for matching.

- Title
- DOI
- PubMed ID
- Ref ID

Additionally, the sheet should contain columns exactly (case-sensitive) matching tag names to import. Cells under tag columns should be the text contents to attach; use a single period to denote a tag to apply without text contents. 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
- 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://doi.org/10.1186/s13063-015-0644-4	Trial of Endovascular Treatment for Acute Ischemic Stroke	36239644	Randomized Controlled Trial: We conducted a multicenter, parallel, open-label, randomized controlled trial.	
3	https://doi.org/10.1186/s13063-015-0645-5	Trial of Thrombectomy 6 to 24 Hours after Ischemic Stroke	36239645	Randomized Controlled Trial: In a trial conducted in 10 hospitals, we randomly assigned patients to receive either standard medical therapy or standard medical therapy plus intravenous alteplase.	
4	https://doi.org/10.1186/s13063-015-0646-6	Endovascular Therapy for Ischemic Stroke with Mild to Moderate Large Vessel Occlusion: A Randomized Clinical Trial	34010530	Randomized Controlled Trial: We randomly assigned patients to receive either standard medical therapy or standard medical therapy plus intravenous alteplase.	Standard medical therapy only: Alteplase
5	https://doi.org/10.1186/s13063-015-0647-7	Endovascular treatment versus best medical practice in acute ischaemic stroke: a randomised controlled trial	31831388	Randomized Controlled Trial: We did a multicenter, parallel, open-label, randomized controlled trial.	Endovascular therapy plus/minus alteplase

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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