

# Organizational Templates

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

## How Templates Work:

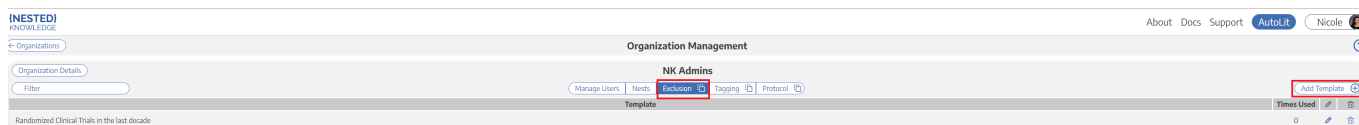
Templates are created by Organizational Owners and/or Admins. They are managed and edited from your [Organizations](#) page, and then can be used by any member to pre-populate content into any nest your Organization owns.



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.

← Organizations

Organization Management

?

Organization Details

Nested Knowledge

Filter

Manage Users

Nests

Exclusion

Tagging

Protocol

Close Template

Template	Times Used		
Case series or better, published since 2015, no SR/MA	14		
Basilar Artery exclusion reasons	2		
Test	1		
new set	0		
SLR	0		

Case series or better, published since 2015, no SR/MA

Add

Exclusion Reasons

Reason		
Published since 2015		
Case report or <5 patients		
Editorial		
Correspondence		
In vitro study		
In vivo study		
Protocol or methods article		
Guidelines article		
Systematic review or meta-analysis		
News or update		
Secondary analysis		

To use an Exclusion Reason Set, go to the Configure Screening 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!

Add

Exclusion Reasons

Import Set

Reason		Excluded Records	No Full Text	
Does not have an MT to thrombolysis compariso...		138	Signals No FT	
Published Before 2014-01-01		50	Signals No FT	
Does not relate to basilar AIS		16	Signals No FT	
retrospective study		9	Signals No FT	
Case report or <5 patients		8	Signals No FT	
Editorial		6	Signals No FT	

Exclusion Reason Templates

Select a template to see a list of exclusion reasons. These templates were created by your organization and can be imported into your nest.

Exclusion Templates

Name

Case series or better, published since 2015, no SR/...

Basilar Artery exclusion reasons

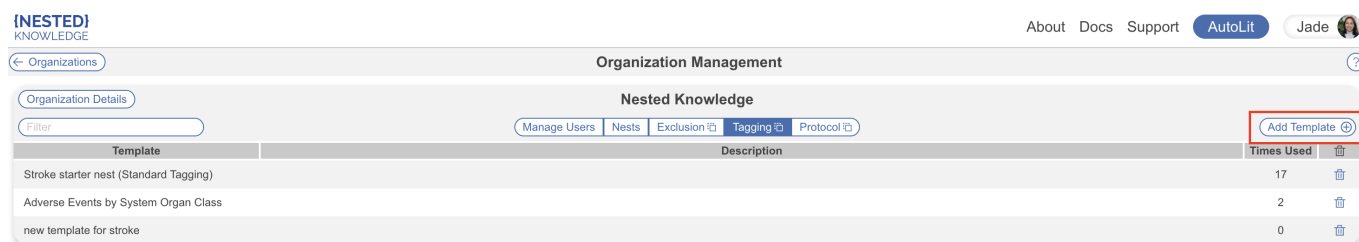
new set

Cancel

Import Selected

## 2. Tag Hierarchy Templates

To create a Tag Hierarchy Template, select “Add Template” and input a name and description (optional):




The screenshot shows the 'Create Template' form. The title 'Nested Knowledge' is at the top, followed by 'Create Template'. There are two input fields: 'Name' with the text 'example name' and 'Description' with the text 'example description'. At the bottom left is a 'Cancel' button, and at the bottom right is a 'Create' button.

Here you can build a hierarchy to template from scratch by selecting “Create New Tag” or import a hierarchy from an existing nest. If your organization has not been assigned ownership of any nests, you will see the following:

wiki:autolit:admin:settings:orgs:templates <https://wiki.nested-knowledge.com/doku.php?id=wiki:autolit:admin:settings:orgs:templates>

[illegible]

In this case, navigate to the nest containing the hierarchy you'd like to template, Settings, and assign organizational ownership:





Next Home


- Activity
- Settings**

Literature Search

- Other Sources
- Duplicate Review
- Search Exploration

Screening 

Tagging 

MA Extraction 

Critical Appraisal

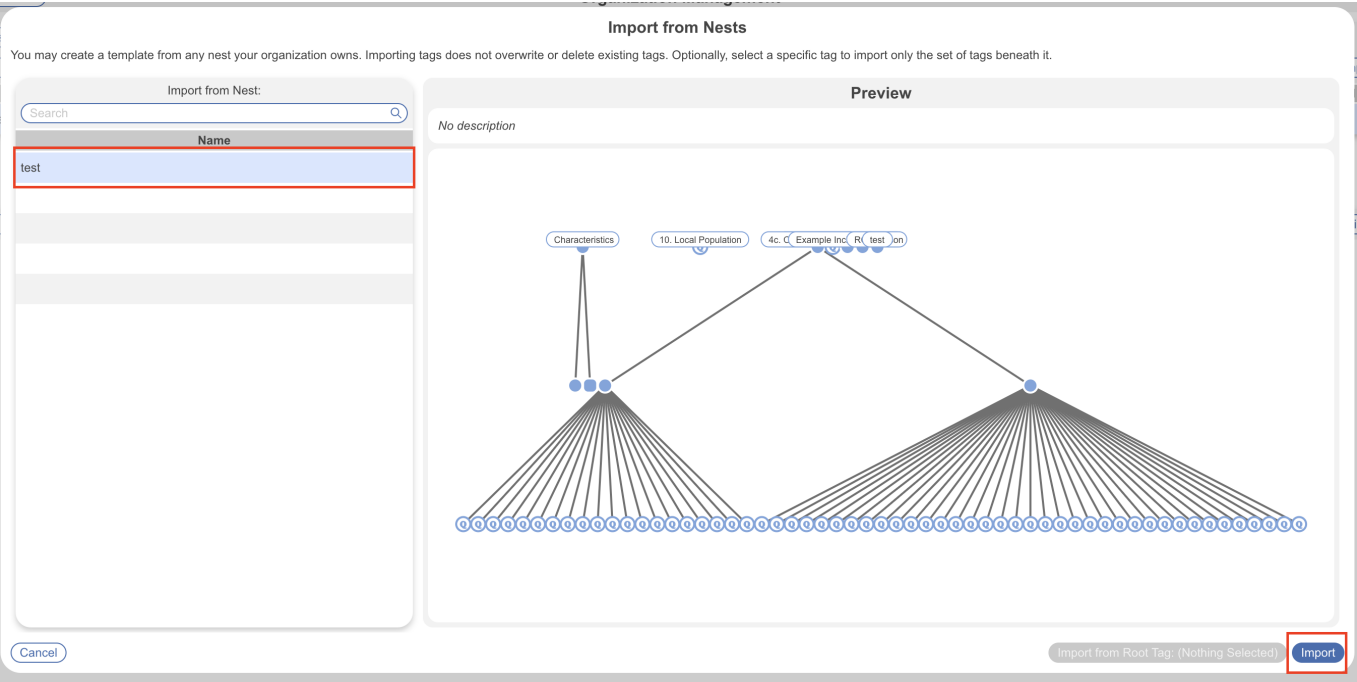
Study Inspector

## Collaborators

You can configure user- and organization-level access to both AutoLit and Synthesis for this nest. Granting the User role will allow a user to work on AutoLit and view Synthesis. Granting the Admin role provides access to this settings page.

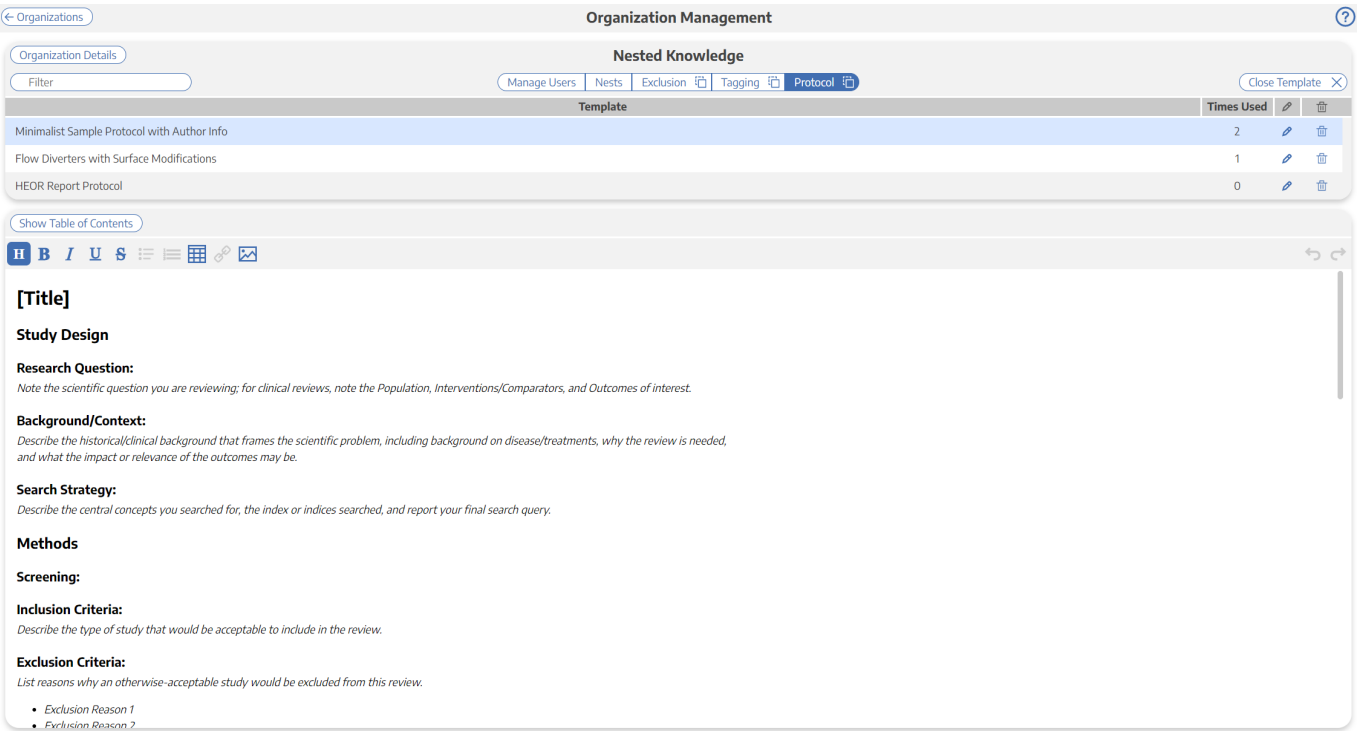
[illegible]

Once this is done, select the nest you'd like to template from and import either the entire hierarchy or a selected section. Now this template can be used by any nests owned by your organization!

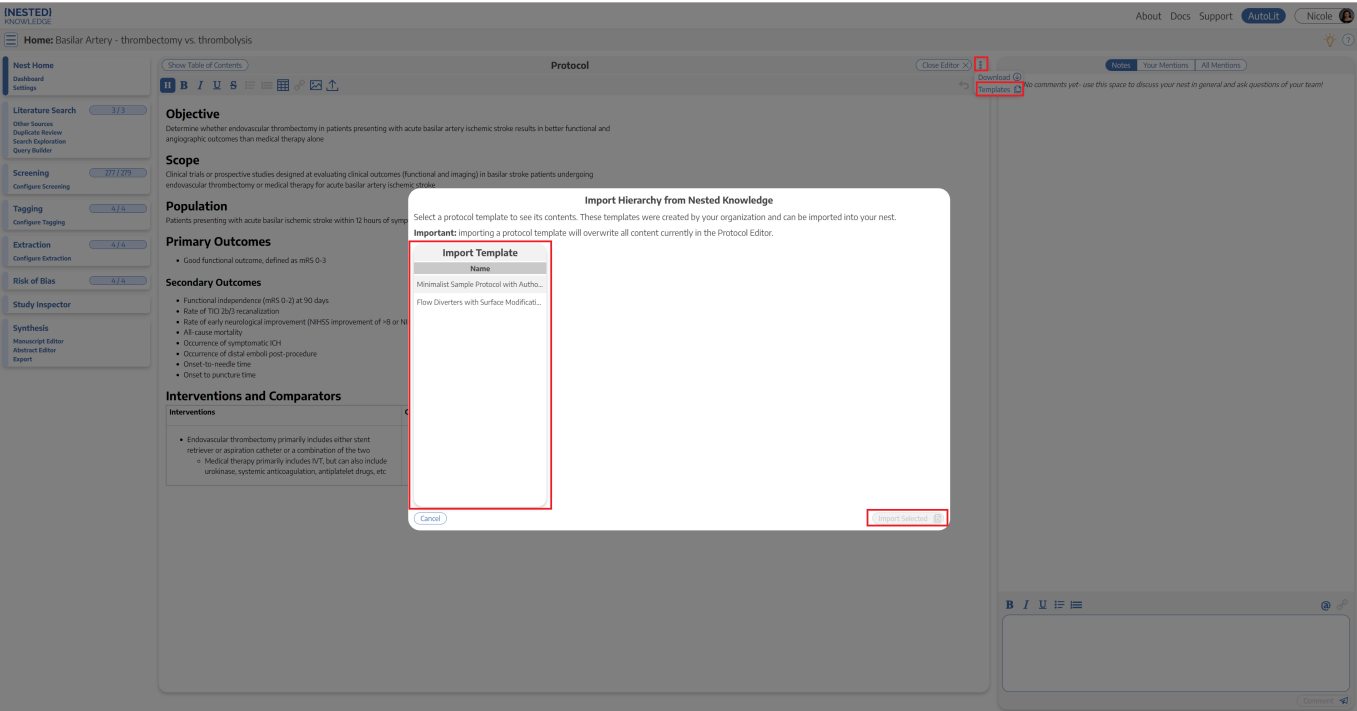


3. Protocols

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 “Templates” from the options under the three vertical dots in the upper right hand corner. Choose a protocol template from the list.



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