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.

Configuring Study Tags:

1. Navigate to Configure Study Tags
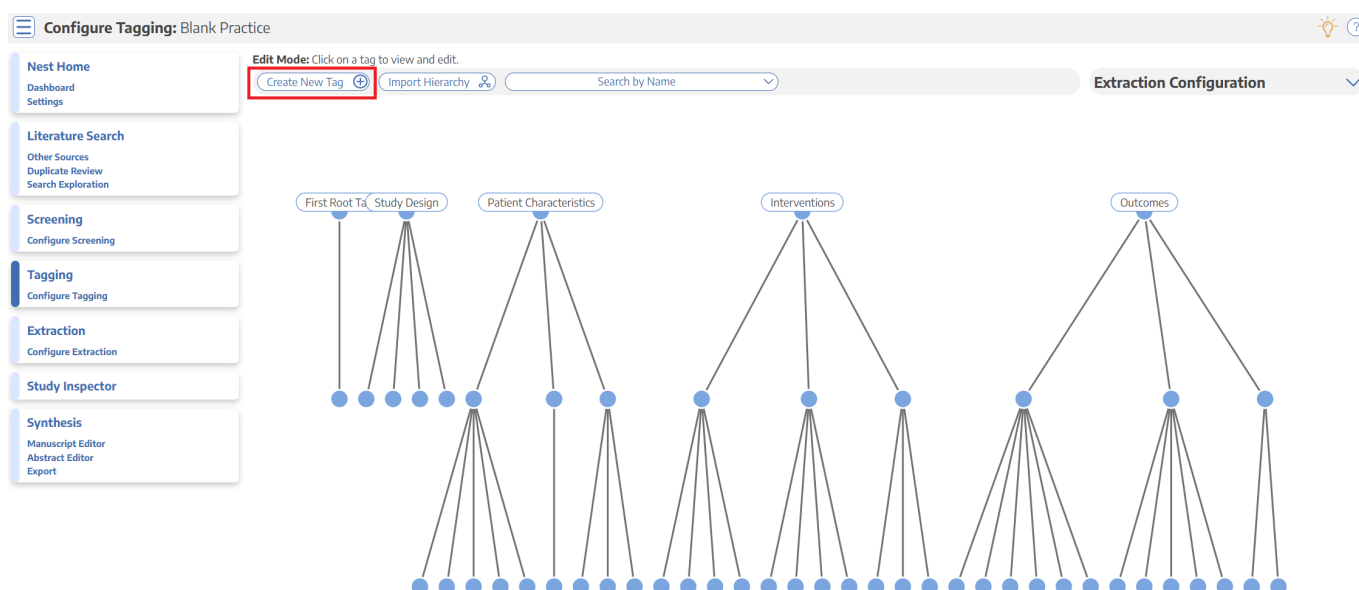
Click "Configure Tagging" under the Tagging tab:

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

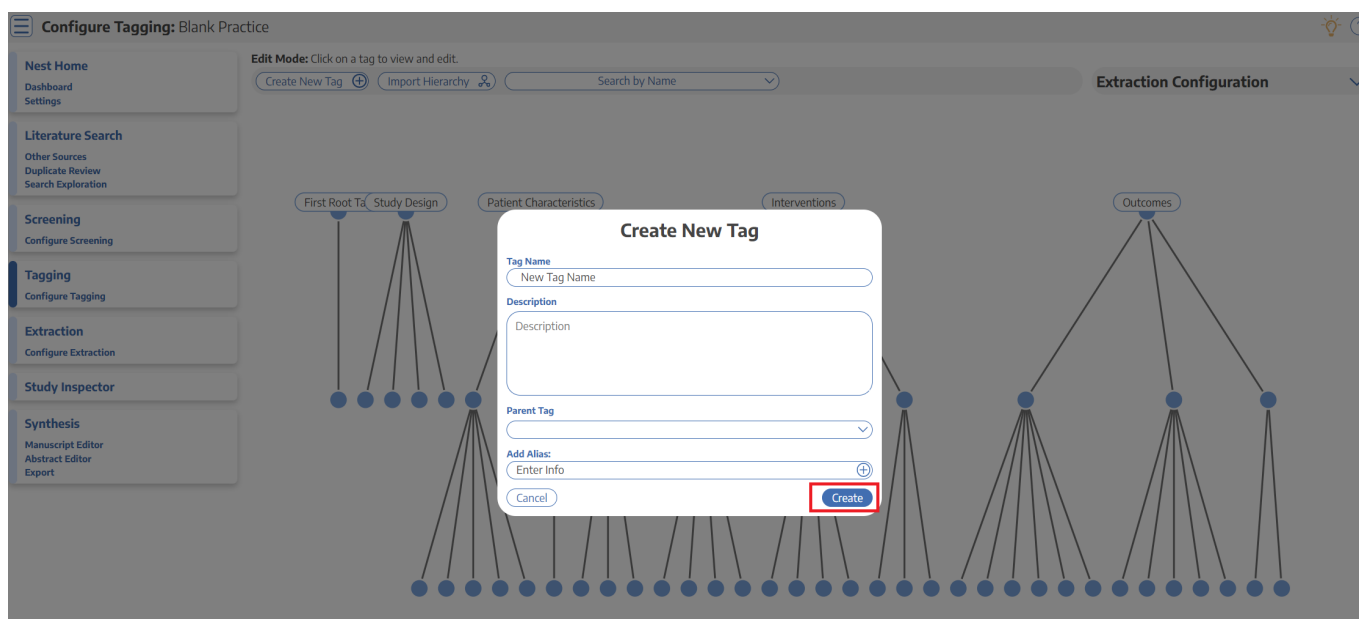## 2. Create Root Tags

Root Tags are the highest level of the hierarchy, and have no parent tags. These should represent the most general categories of qualitative evidence you are gathering. For example, you could create Root Tags representing the patient population, intervention, comparison group, and outcomes (PICO) or similar, and add in any other concepts of interest (such as Study Design).

To create a new Root Tag, click "Create New Tag":

Then, name the tag, but leave the "Parent Tag" drop-down blank. Optionally, add a Description to give details to your team on what a tag represents.

You are now ready to build your hierarchy downward from your Root Tags. Tags should get more specific as they proceed down the hierarchy.

3. Create Child Tags

You can build your hierarchy downward by adding tags below the Root Tags. Click "Create New Tag" and then name your Tag. Connect it to a Root Tag by selecting the relevant tag from the dropdown list under Parent Tag. For example, you could nest "Age" as a tag under Patient Population, or

"Mortality" under Outcomes, or even nest Outcomes → Adverse Events → Mortality to capture intermediate categories.

Once you have added a child tag, your hierarchy should contain the Root Tag and the tag you created below it. Continue building out child tags until your hierarchy contains a tag for every concept you want to recognize from underlying studies and structure into your Qualitative Synthesis.
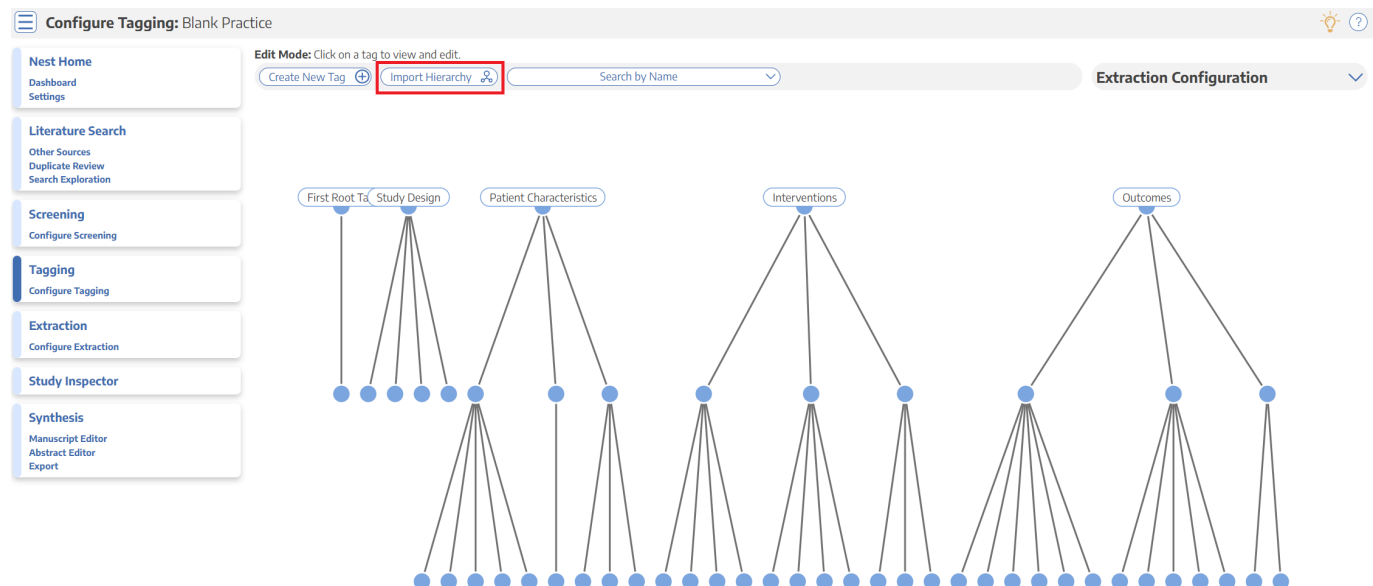

Recommendations in Hierarchy Building

To see examples of hierarchies and Qualitative Syntheses after Tagging is complete, create and examine a Demo Nest. If you are looking for Best Practices recommendations on what to include in your hierarchy, see here!

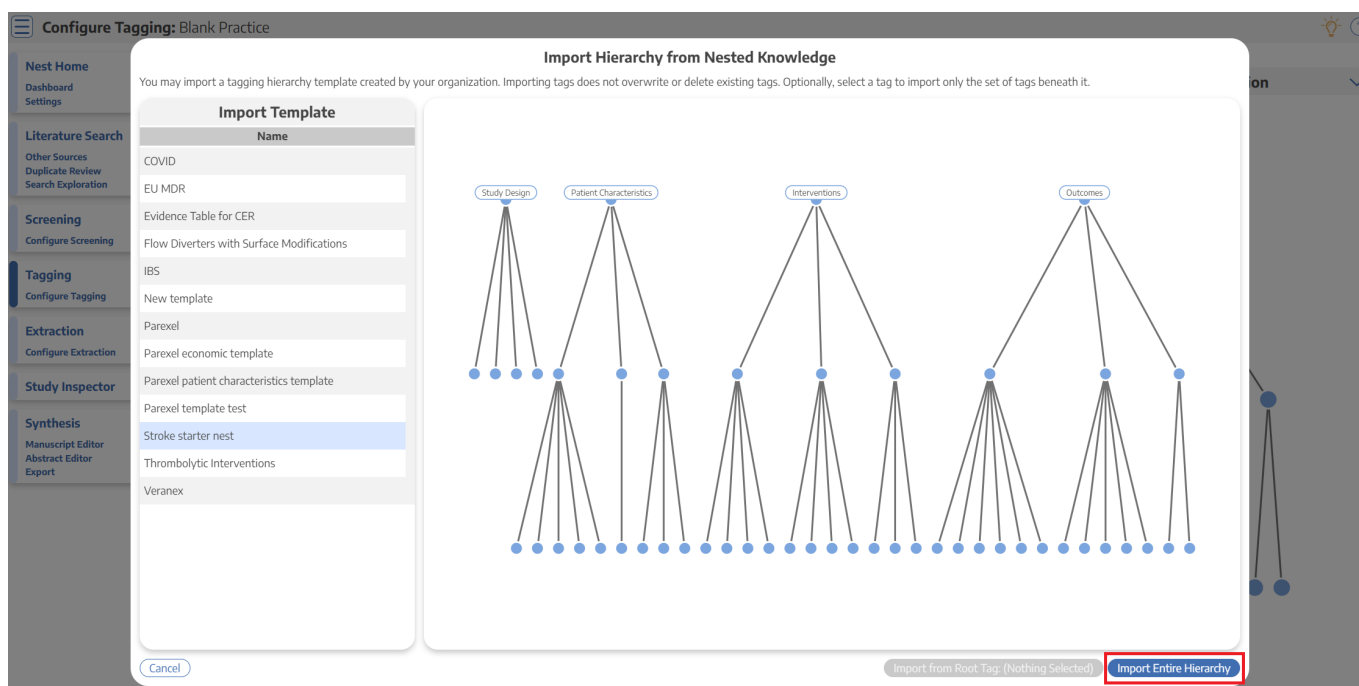# Import a Tag Hierarchy Template

1. Click "Import Hierarchy"

From the Configure Tagging page, select "Import Hierarchy"

2. Choose a Tag Hierarchy Template

Select the Template of interest from the list on the left side of the modal. If no Templates are listed, you may need to grant Organizational Ownership to give that nest access to your Organization's Templates.

How to build a Tag Hierarchy Template

To learn how to build a Tag Hierarchy Template for your Organization, click here.

3. Import a Hierarchy or Root Tag

Then, decide if you want to import the entire hierarchy (red box) or only one Root Tag and its children. To select only one Root Tag and its children, select the Root Tag and then click "Import from Root Tag."

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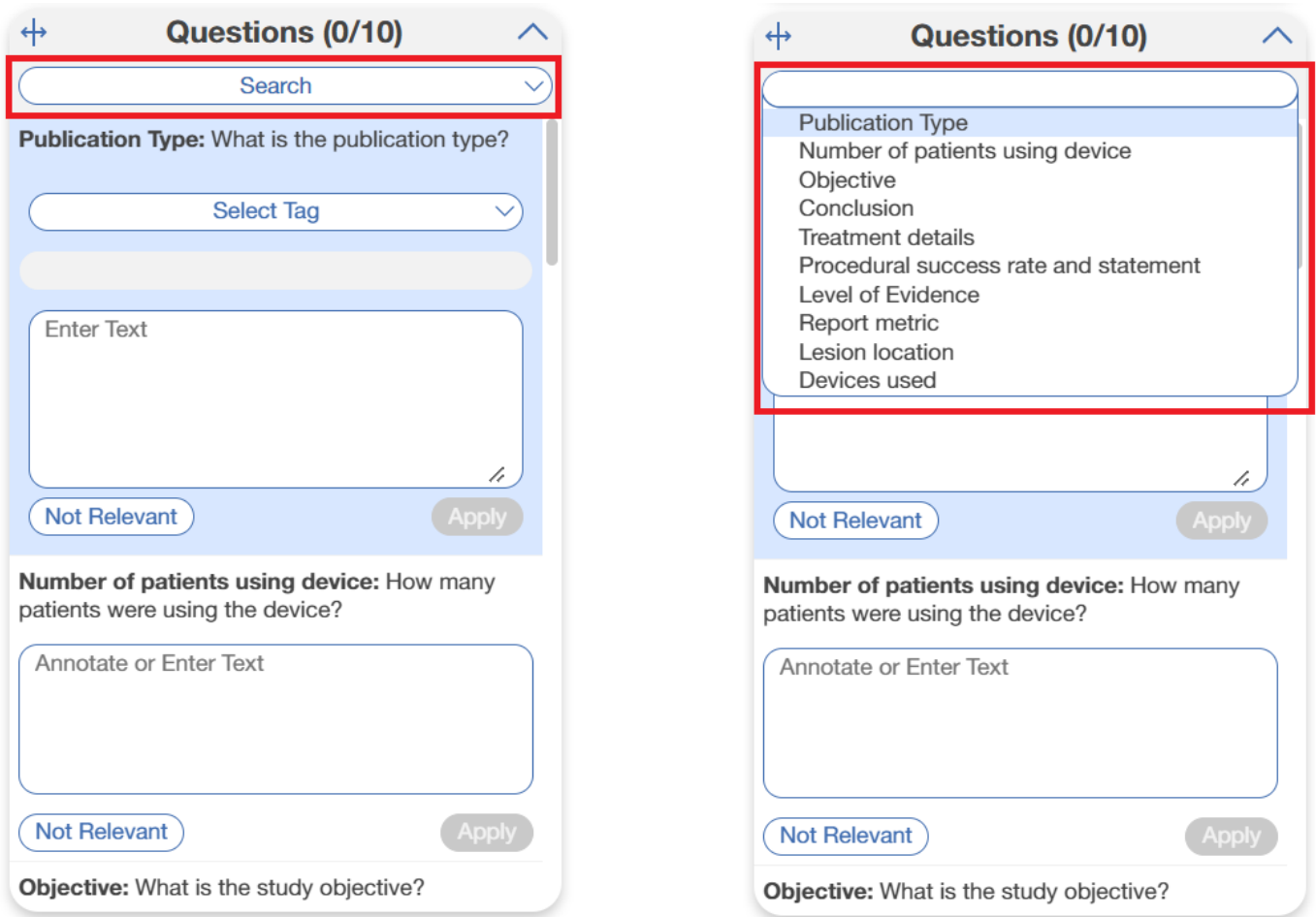
Editing the Tag Hierarchy:

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!
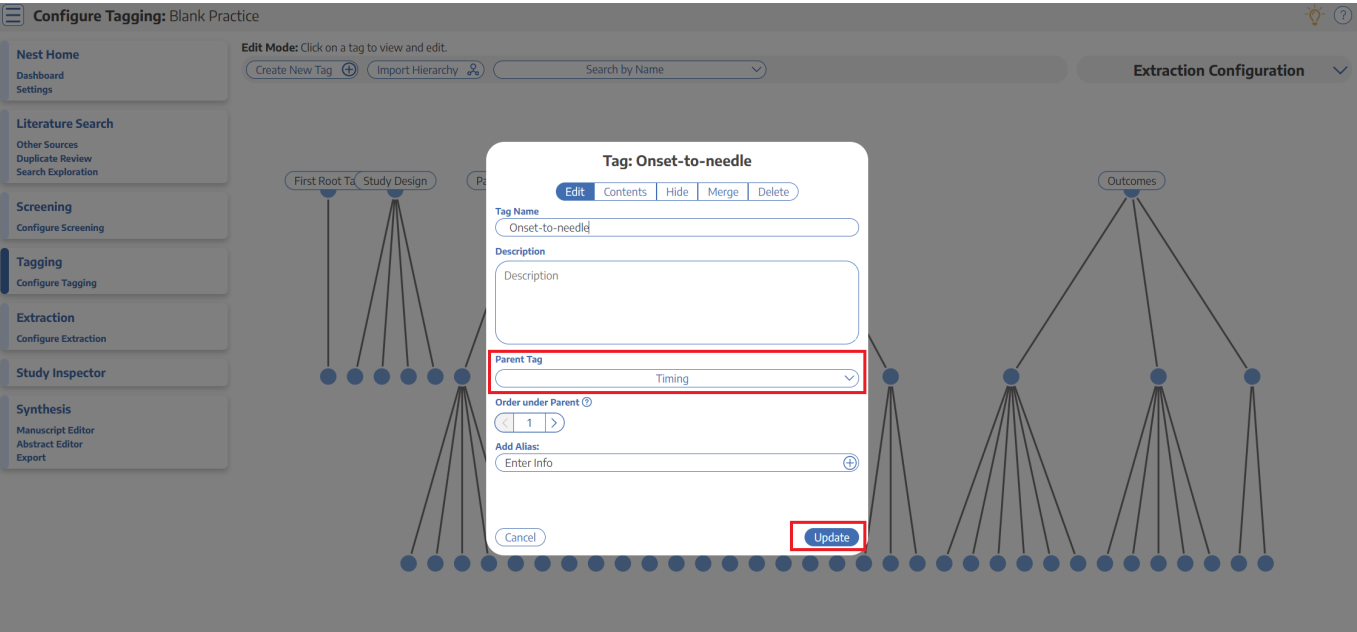
1. Change a Tag's Name

To change a Tag's name, go to the Tag Hierarchy and click on the tag of interest. Click on the tag and rename the title, and then click "Update". **This change will be applied across all studies in the Nest with that tag.**
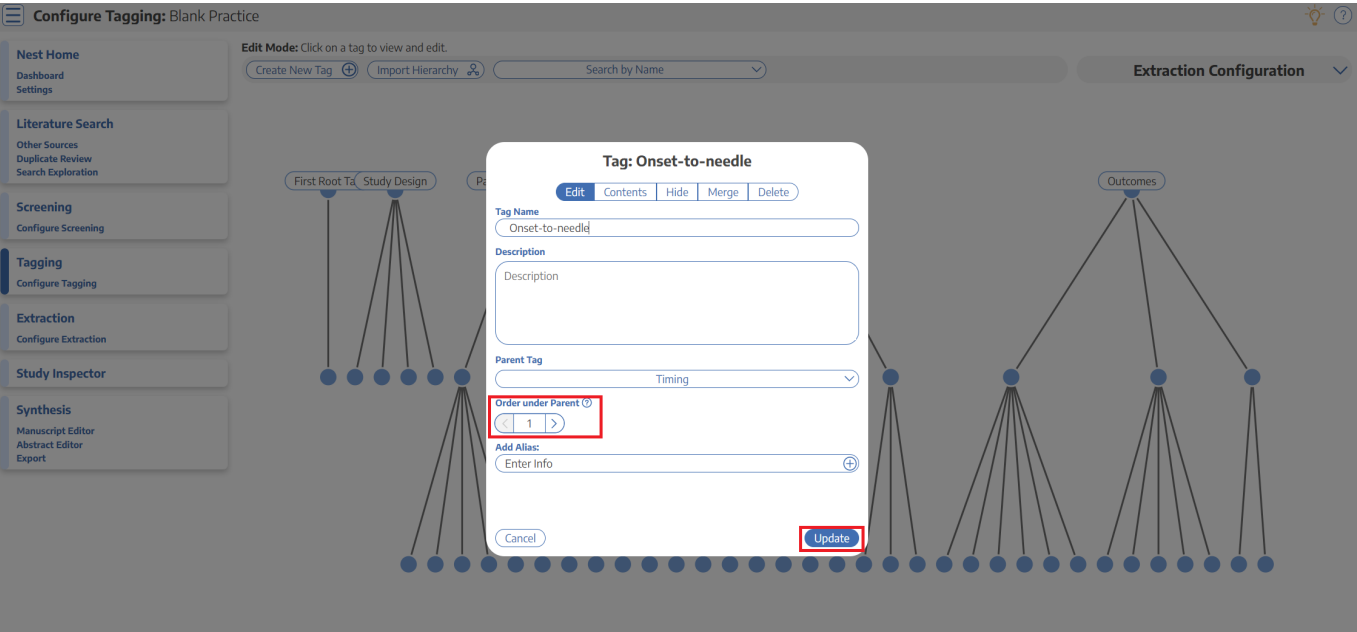

2. Change Parent Tag

Sometimes, you want to move a child tag to be nested under a different parent tag. To do so, click the tab of interest and click on the drop-down menu under "Parent Tag". Changing this will link the tag under a different parent tag. Find the name of the new Parent tag and click "Update"
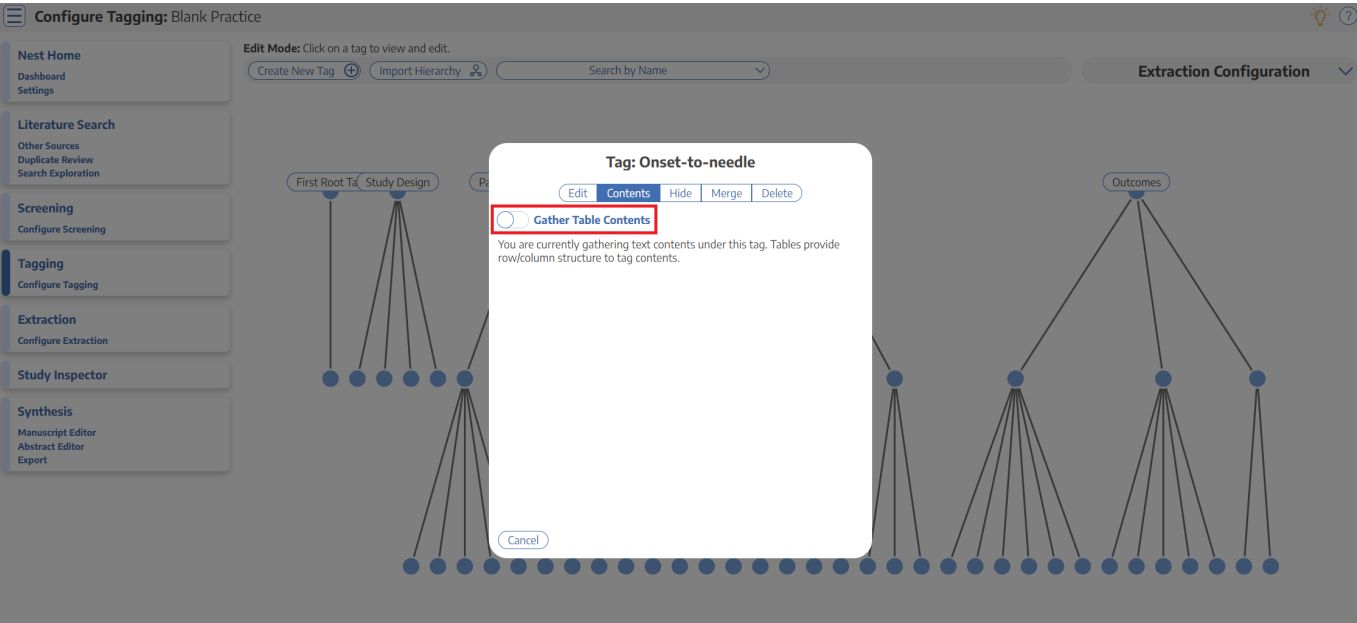
3. Reorder Tags

If you would like to reorder the positioning of tags underneath the parent tag, simply click on the tag you would like to reorder. On the "Edit" menu, use the "Order under Parent" menu to alter the position of the child tag and click "Update." 1 refers to the left-most tag position under the parent tag and higher numbers refer to consecutive positions to the right of this tag. The new ordering will be reflected in the Tagging module, 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 Form-based Tagging mode.
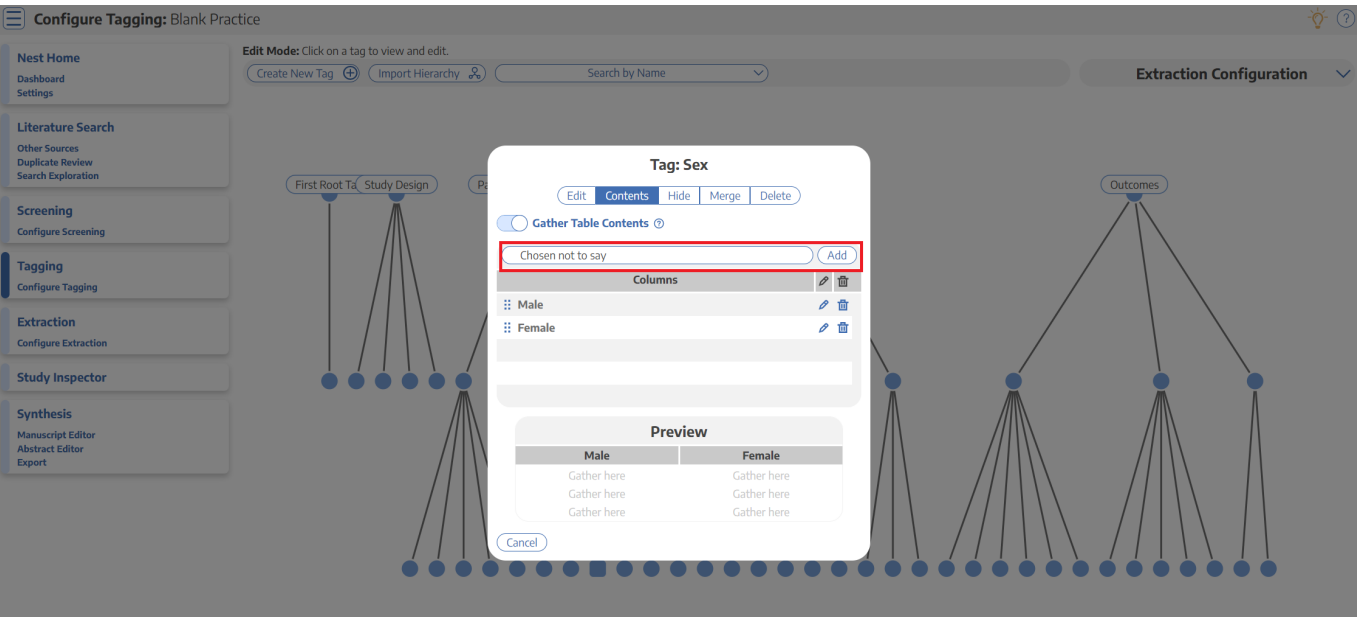
4. Tag Contents

When a tag is created, the default setting is to collect simple text as the contents associated with the tag. If you would like to collect data in the form of a table for a specific tag, instead of just a singular text box, you can toggle on "Gather Table Contents." Learn more about when to use text vs tag tables.
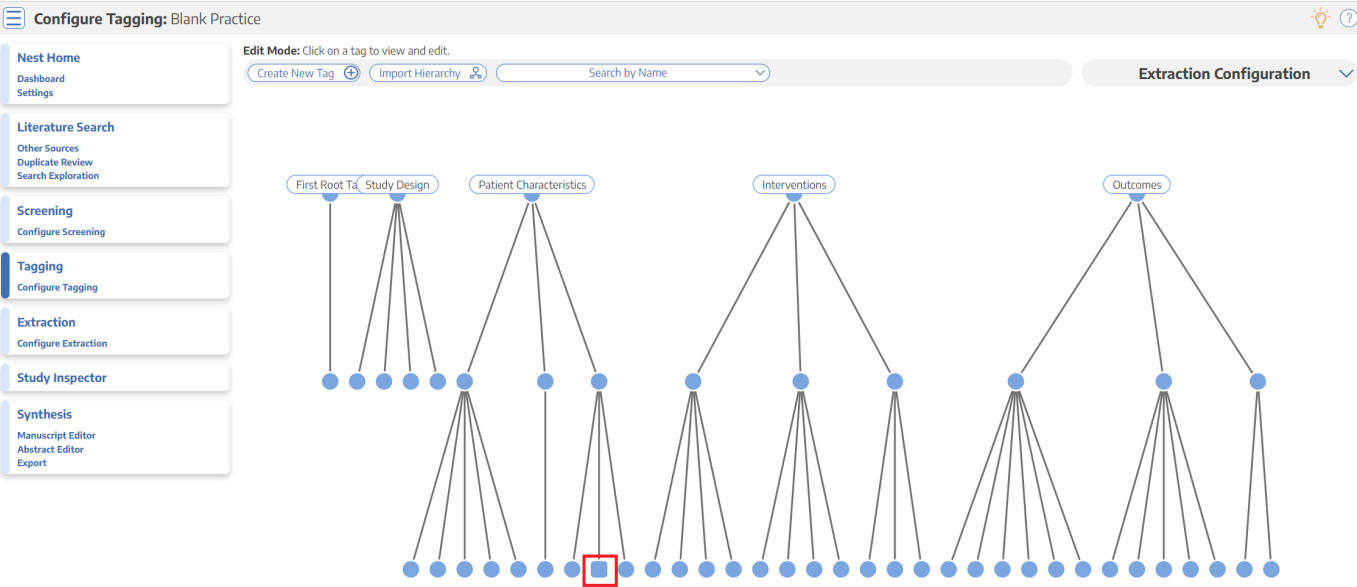

After toggling on Gather Table Contents, you can customize the columns of your table for data extraction. Note: this feature is tag-specific, it only applies to tags where it is toggled on and tables are created from scratch for each tag of choice.

To add columns, type in the column title and click Add. The columns will be added below, and can be reordered, edited or deleted anytime. A preview is also shown for how the table will look in the Tagging module.

Each tag may only have a text *or* a table contents. You may toggle Gather Table Contents on and off
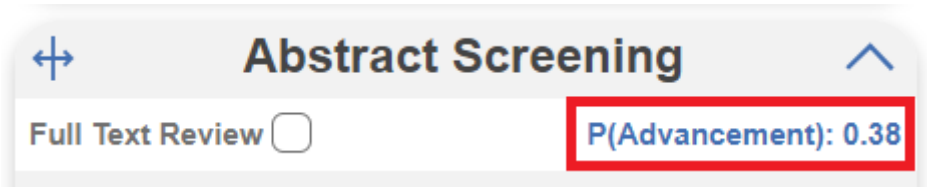
anytime, and the customized columns will be restored when turned back on. When clicking out of the modal, you will see tags with Gather Table Contents on now have a square-shaped tag to differentiate from tags with text content (round tags). Tags with table contents do not affect child tags.
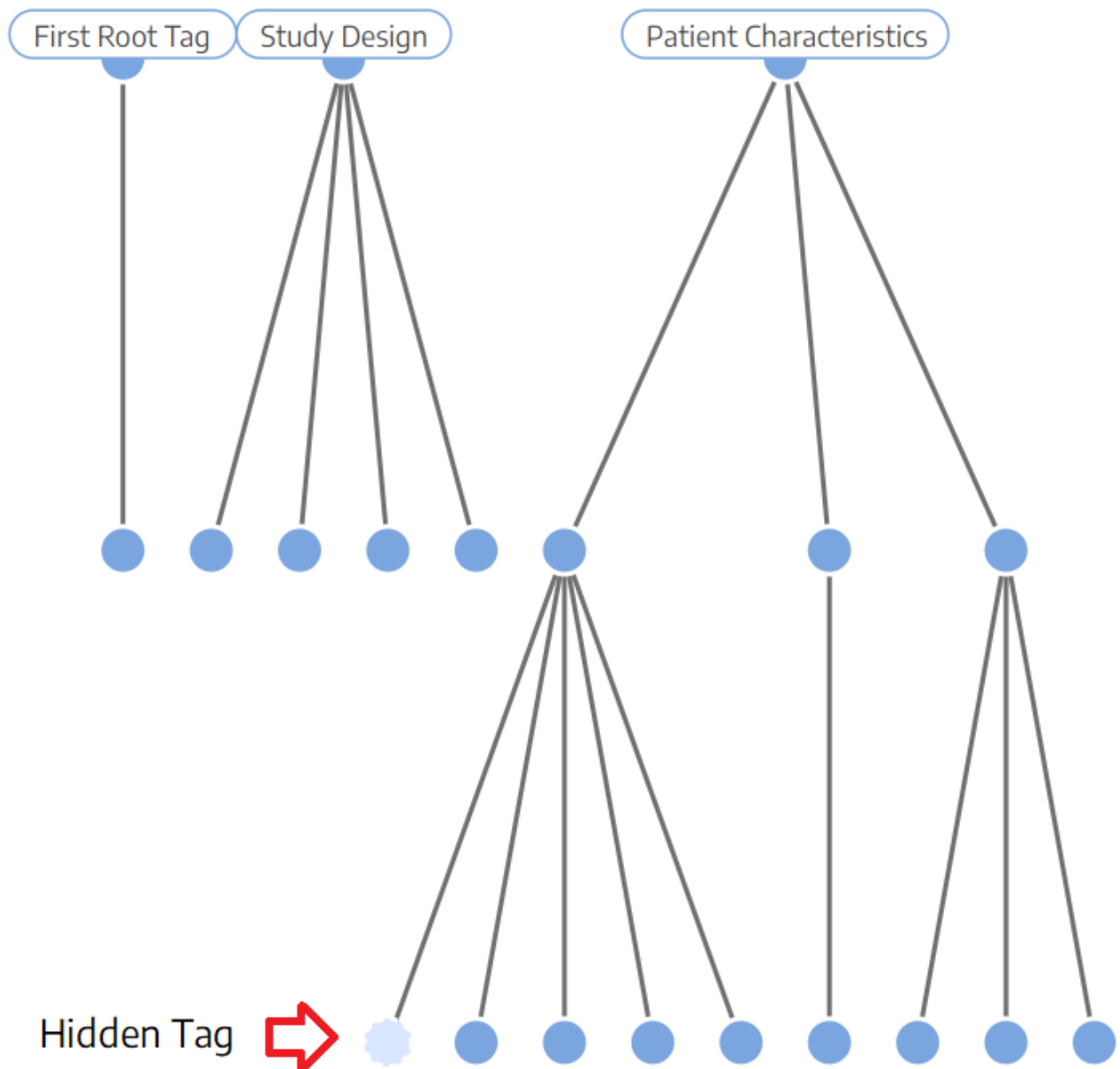

Note: Configuring tags with table contents is compatible with all tagging modes (Standard and Form-based).

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5. 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, click on the tag and under the "Hide" menu, toggle on "Hide on Synthesis."

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.

6. Merge Tags

If you would like to combine multiple tags into one tag, click on the tag that you would like to merge into the other. Use the "Target Tag" menu to find the tag you would like to merge with and then click the "Merge" button.

Why would you Merge tags? Either because they are duplicates or because they are concepts you would like to combine.
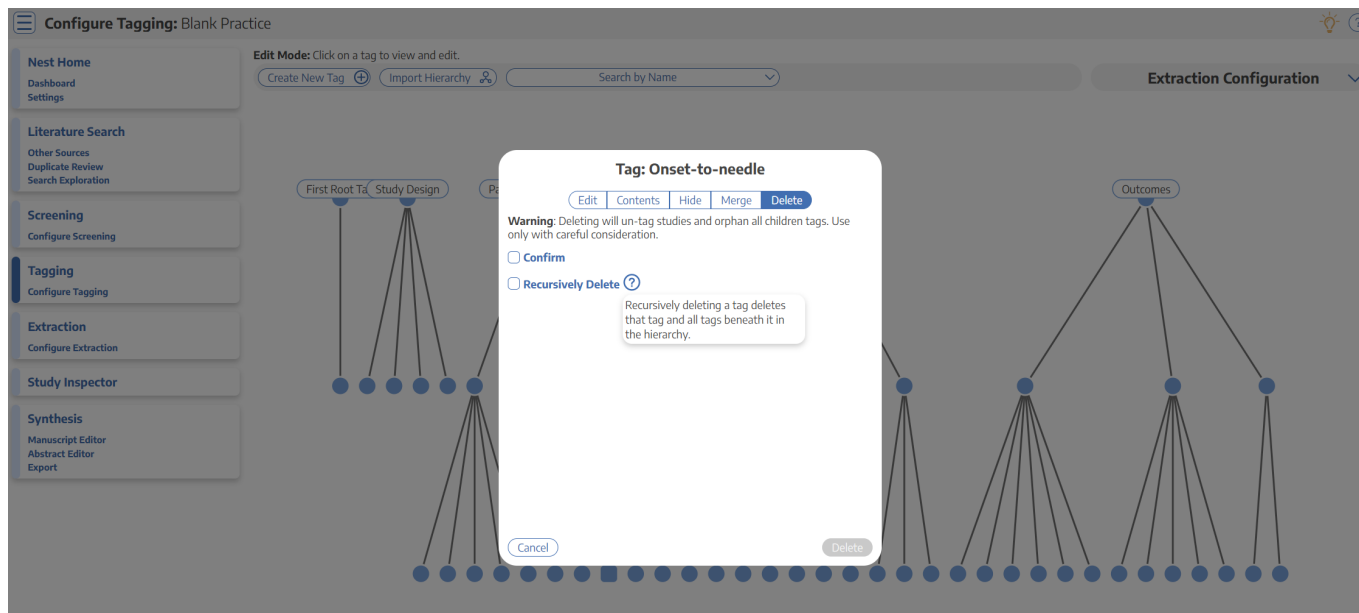
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7. Delete Tags

Find the tag you would like to delete, Click the "Delete" button on the top right, click the "Confirm" square, then click "Update". **When a tag is deleted in Configure Tagging, it deletes the tag from the hierarchy and from all studies it has been applied to.**

If you delete a single tag that has children, but do not do delete recursively, the child tags will be reverted to Root Tags and you will need to identify new Parent Tags as relevant.

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

Recursively Delete Tags

In the Deletion modal, you have the option to delete a single tag or to "recursively" delete. Recursive deletion, unlike single-tag deletion, will delete the tag in question as well as all of its child tags.

To Recursively Delete, select the check-box for "Recursively Delete?" and for "Confirm" before clicking "Delete." As with deleting single tags, this cannot be undone!

7. 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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