

# 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.

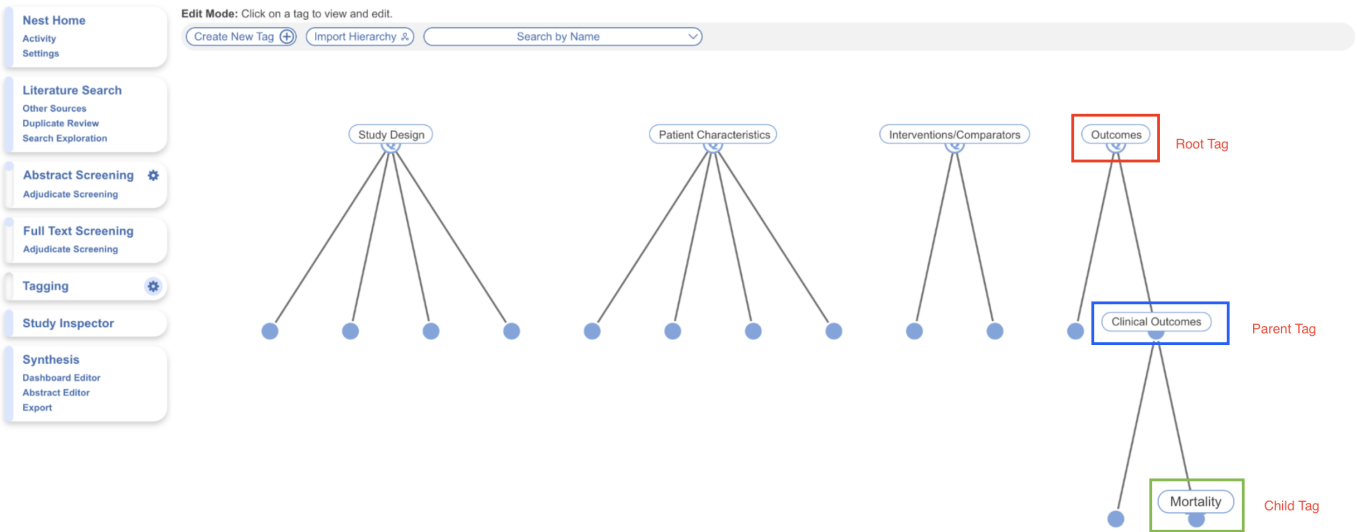
Alternatively, you can switch to **Standard** mode, which is less structured and allows you to configure concepts to be extracted via a list of dropdown tags. Follow [these instructions on configuring tags in Standard Tagging mode](#). Note: switching between modes results in no loss of data.

## 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, “Outcomes” is a root tag (the highest level) and a parent tag to “Clinical Outcomes,” “Clinical Outcomes” is a parent tag to “Mortality” (but not a root tag), and “Mortality” 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.



# 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.

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## 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 start, click "Create New Tag" and give the tag a name. Select a question type from the dropdown depending on the question type.

## Create New Tag

Tag Name

Study Type

Question Type ?

Single Apply

Single Select

Multiple Select

Parent Tag

Add Alias:

Enter Info

Cancel

Create

You have the following options for Question types:

- **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
- **Single Apply:** Open-ended question type where only a text box is shown, answering the question applies the tag, indicating the concept is present.

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

## Tag: Study Design

EditContentsHideMergeDelete

**Tag Name**

Study Design

**Question Type** ?

Single Select

**Question**

What is the study design?

**Parent Tag**

**Order under Parent** ?

<1>

**Add Alias:**

Enter Info

CancelUpdate

Note: Leaving “Parent Tag” blank, keeps the tag at the top of the hierarchy (root tag).

### 3. Configure Tag Answers

Single Apply questions do not require tag answers but for Single Select and Multiple Select Questions, they require tag answers to work.

Follow the same process as above via Create New Tag, input the answer as the Tag Name, leave the question type blank, add a description if applicable, click the Parent Tag dropdown and select the tag the answer belongs under.

Tag: Randomized Controlled Trial

Edit

Contents

Hide

Merge

Delete

Tag Name

Randomized Controlled Trial

Question Type ?

Description

Description

Parent Tag

Study Design

Order under Parent ?

<

1

>

Add Alias:

Enter Info

Cancel

Update

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

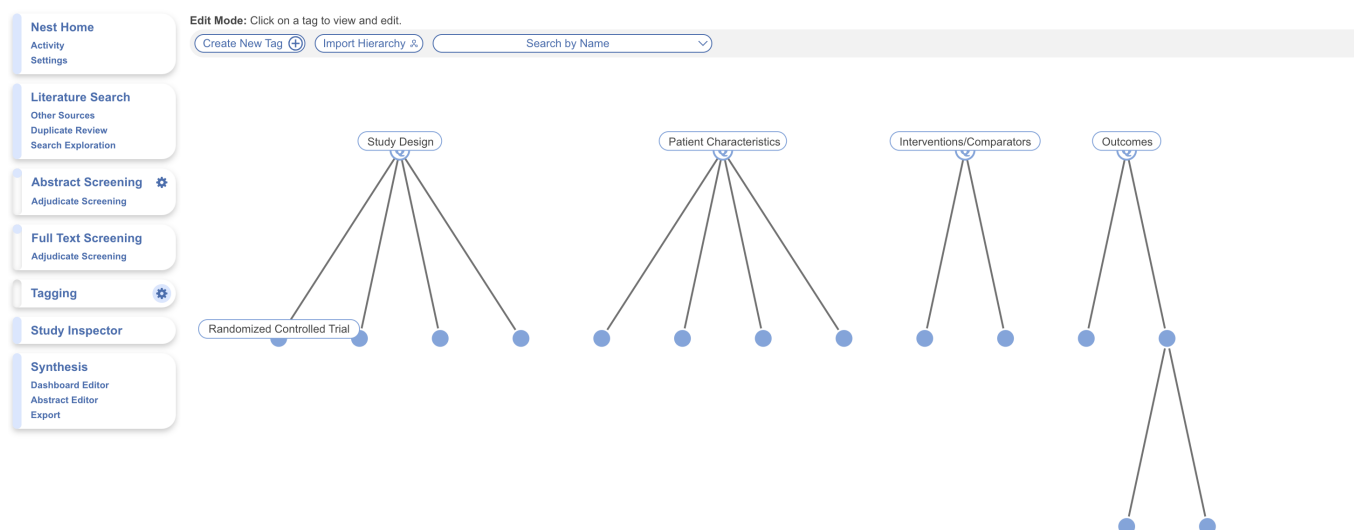
Example Multi-Select question:

- **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.



## Tips on Preliminary Hierarchy Organization

Every Question that you create will be presented to users [during the Tagging stage](#), in order of (in the hierarchy) left to right. See [instructions below on reordering tags](#).

In addition, due to the flexibility of tags, it can be helpful to create root and parent tags to organize your configured questions.

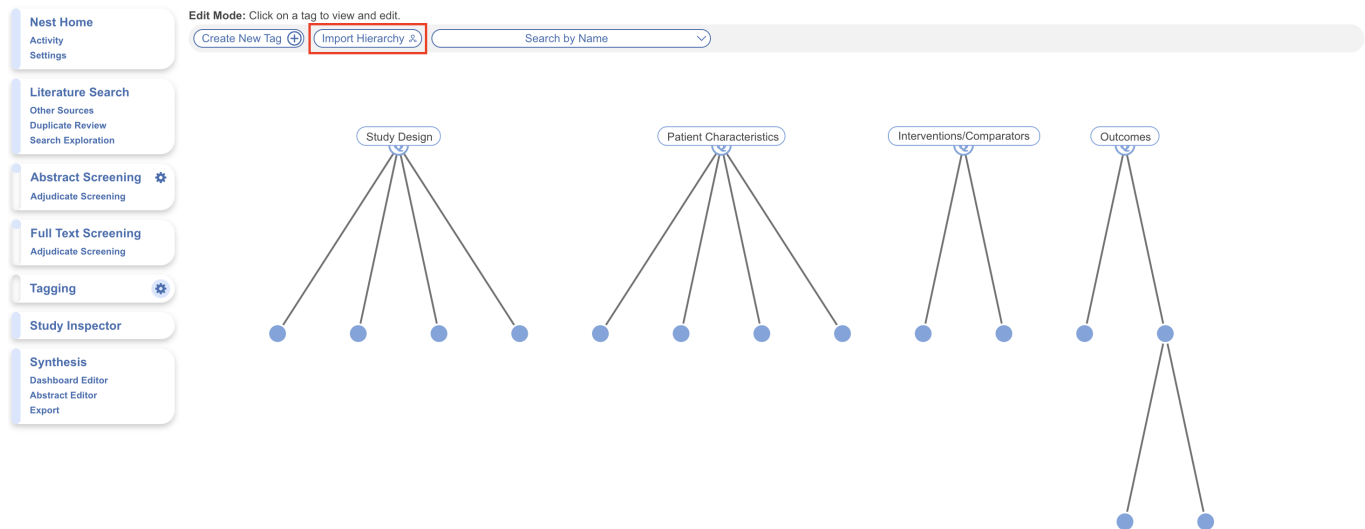
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## Import a Tag Hierarchy Template

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. Click "Import Hierarchy"

From the Configure Tagging page, select "Import Hierarchy"



## 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

Learn more on how to import tag templates [here](#).

### 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 or only one Root Tag and its children. For the whole hierarchy click "Import."

**Tag Templates**

You may import a tagging template created by your organization, or select among public templates published by Nested Knowledge. Importing tags does not overwrite or delete existing tags. Optionally, select a tag to import only the set of tags beneath it.

This nest does not have an organizational owner, so only public templates are available. You may specify an organizational owner under Settings.

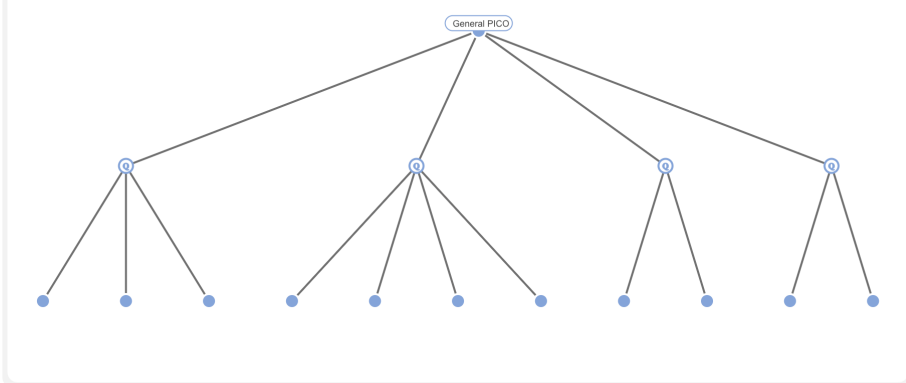
No Organization Owner Public Templates

Search

Name
Critical Appraisal: BMJ Grade Checklist
Critical Appraisal: Downs and Black Checklist (2018)
Critical Appraisal: Drummond Checklist
Critical Appraisal: JBI Checklist for Economic Evaluations (2017)
Critical Appraisal: JBI Checklist for Prevalence (2017)
Critical Appraisal: Phillips Checklist
EUMDR
General PICO
NICE
Review of Inclusion Criteria and Endpoints

Preview

This tag template is structured to identify the general PICO: Population, Interventions/Comparators, and Outcomes, as well as basic study type.



Import from Root Tag: (Nothing Selected) Import

To select only one Root Tag and its children, select the Root Tag and then click “Import from Root Tag.”

**Tag Templates**

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This nest does not have an organizational owner, so only public templates are available. You may specify an organizational owner under Settings.

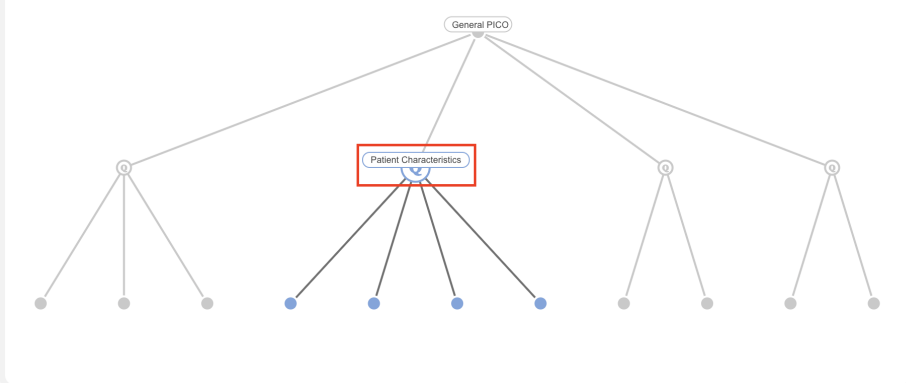
No Organization Owner Public Templates

Search

Name
Critical Appraisal: BMJ Grade Checklist
Critical Appraisal: Downs and Black Checklist (2018)
Critical Appraisal: Drummond Checklist
Critical Appraisal: JBI Checklist for Economic Evaluations (2017)
Critical Appraisal: JBI Checklist for Prevalence (2017)
Critical Appraisal: Phillips Checklist
EUMDR
General PICO
NICE
Review of Inclusion Criteria and Endpoints

Preview

This tag template is structured to identify the general PICO: Population, Interventions/Comparators, and Outcomes, as well as basic study type.



Import from Root Tag: Patient Characteristics Import

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.***

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## 2. Change Question Type and/or Description

To change a Tag's question type, click on the tag of interest, click on the drop-down menu under "Question Type." To change the question being asked, edit the Question text box and remember to click Update.

## 3. Change Parent Tag

Sometimes, you want to move a child tag to be nested under a different parent tag. To do so, click the tag 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."

Tag: Retrospective Study

Edit

Contents

Hide

Merge

Delete

Tag Name

Retrospective Study

Question Type ?

Description

Description

Parent Tag

Study Design

Order under Parent ?

<

3

>

Add Alias:

Enter Info

Cancel

Update

#### 4. 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 (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.

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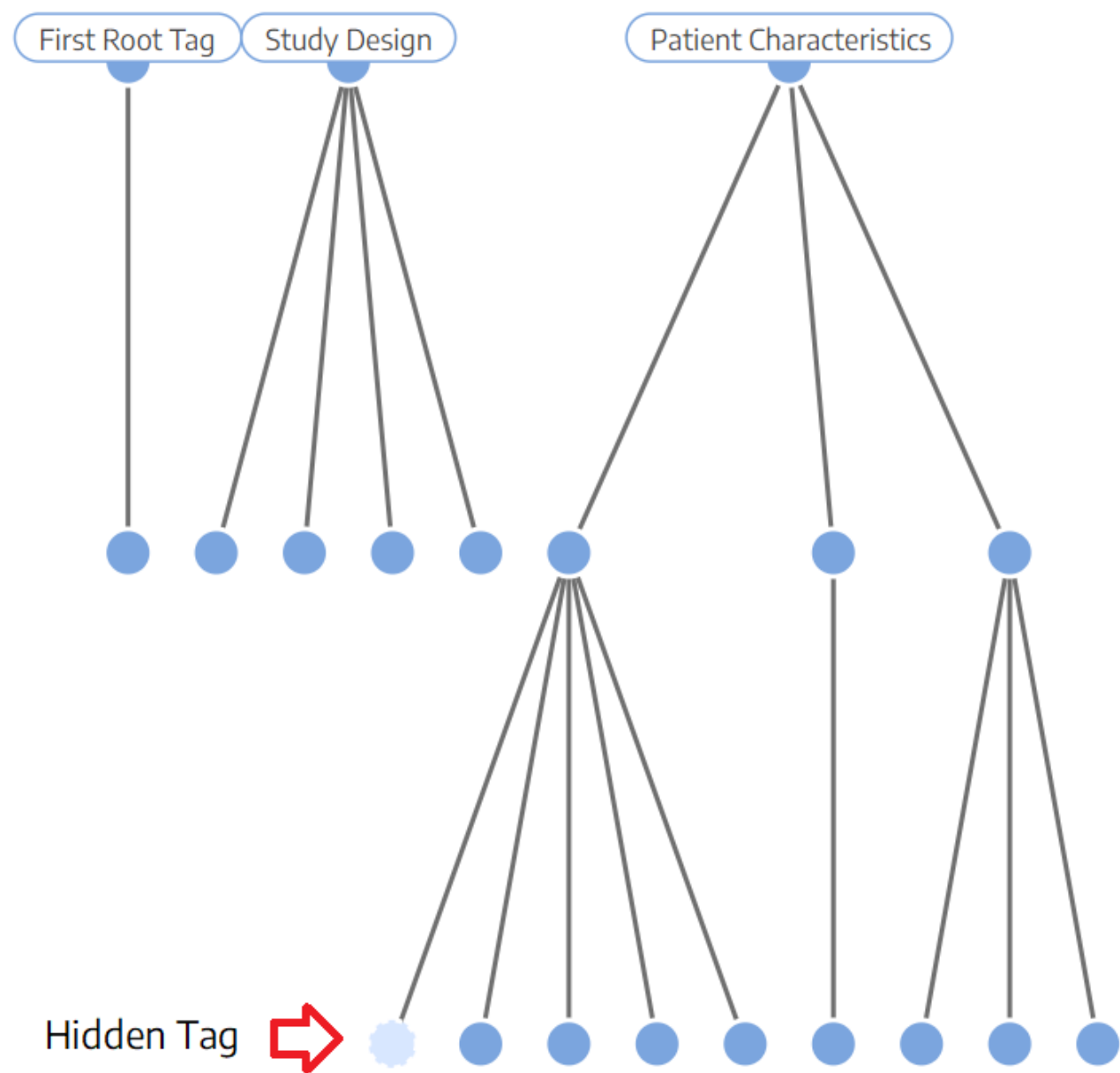
## 5. Tag Contents

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](#).

## 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.

## Tag: Retrospective Study

EditContentsHideMergeDelete

Warning: you are attempting to merge **Retrospective Study** into a Target Tag. By doing so, the study-applied Tags, arm Interventions, and Data Elements corresponding to **Retrospective Study** may be transferred, updated or deleted.

Target

Select Tag

CancelMerge

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

## 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!

### Tag: Retrospective Study

- Edit
- Contents
- Hide
- Merge
- Delete

**Warning:** Deleting will un-tag studies and orphan all children tags. Use with careful consideration.

- ☒ Confirm
- ☐ Recursively Delete

Cancel

Delete

## 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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