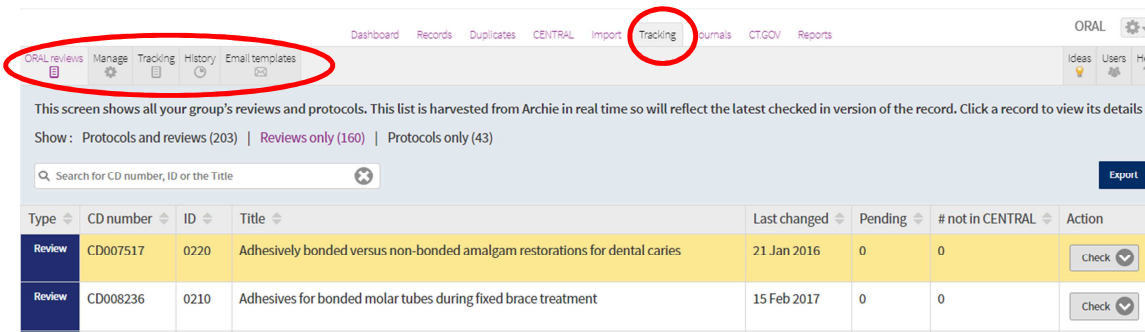


Quick ref guides

What's what on the tracking screen

The tracking screen is designed to help you track references through the review process. It allows you to see which references and studies are linked to which reviews in your segment. It also allows you to manage the process of sending references to the authors of the reviews.

Access the tracking screen by using the tracking tab on the toolbar:



Dashboard Records Duplicates CENTRAL Import **Tracking** Journals CT.GOV Reports ORAL

ORAL reviews Manage Tracking History Email templates

This screen shows all your group's reviews and protocols. This list is harvested from Archie in real time so will reflect the latest checked in version of the record. Click a record to view its details

Show: Protocols and reviews (203) | **Reviews only (160)** | Protocols only (43)

Search for CD number, ID or the Title

Type	CD number	ID	Title	Last changed	Pending	# not in CENTRAL	Action
Review	CD007517	0220	Adhesively bonded versus non-bonded amalgam restorations for dental caries	21 Jan 2016	0	0	Check
Review	CD008236	0210	Adhesives for bonded molar tubes during fixed brace treatment	15 Feb 2017	0	0	Check

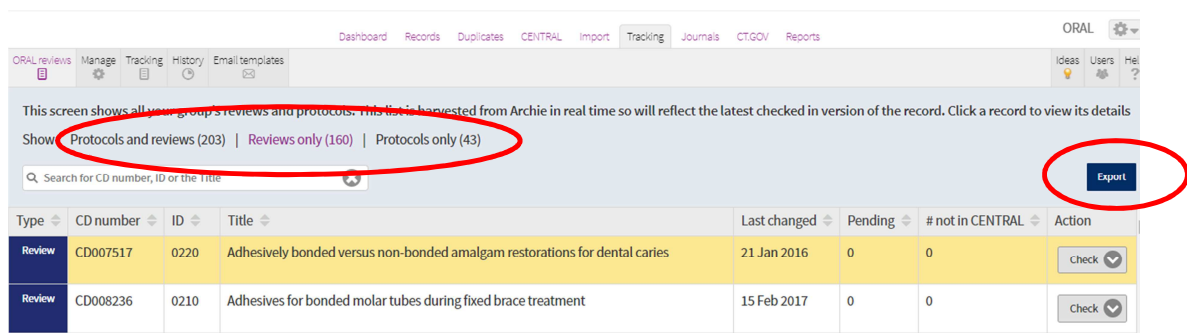
There are five tabs within the tracking screen: reviews, manage, tracking, history and email templates

Reviews tab

The reviews tab links with Archie, and pulls all of the group's reviews and protocols from Archie. This list can be searched by CD number, Archie review ID number or by using key words from the title.

You have the option here to look at protocols and reviews, just protocols or just reviews.

You can also export the list as a .csv file by clicking "Export". Click on any title to open it within the next tab ("Manage").



Dashboard Records Duplicates CENTRAL Import Tracking Journals CT.GOV Reports ORAL

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Show: Protocols and reviews (203) | **Reviews only (160)** | Protocols only (43)

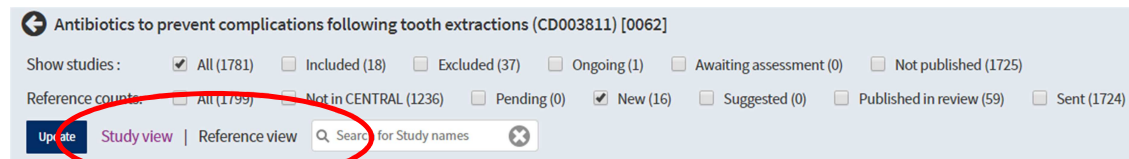
Search for CD number, ID or the Title

Type	CD number	ID	Title	Last changed	Pending	# not in CENTRAL	Action
Review	CD007517	0220	Adhesively bonded versus non-bonded amalgam restorations for dental caries	21 Jan 2016	0	0	Check
Review	CD008236	0210	Adhesives for bonded molar tubes during fixed brace treatment	15 Feb 2017	0	0	Check

Export

Manage tab

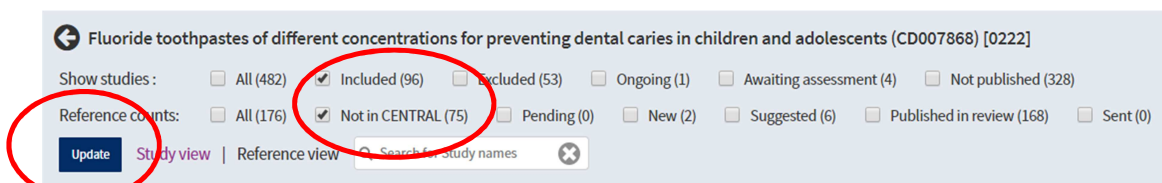
The manage tab displays all the studies and references that are linked to the review. Selecting the tick boxes will filter the results. The top row of tick boxes relates to studies, and the bottom row relates to the references within those studies. You can toggle between studies and references using “Reference view” and “Study view”.



Guide to categories:

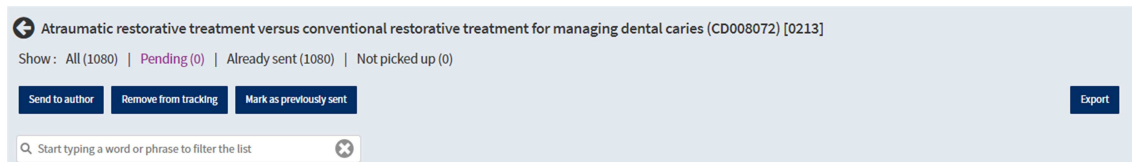
INCLUDED	Studies or references which have been included in the review
EXCLUDED	Studies or references which are linked to the review as an excluded study or part of an excluded study
ONGOING	Studies or references which are linked to the review as an ongoing study or part of an ongoing study
AWAITING ASSESSMENT	Studies or references which are linked to the review that are awaiting assessment
NOT PUBLISHED	Studies or references sent through the tracking process to authors but not added to the review
NOT IN CENTRAL	References linked to the review which are not in CENTRAL
PENDING	References or studies that have been added to the tracking screen but have not yet been sent to the author
NEW	References which have been added to a study since the study was linked with the review
SUGGESTED	References which have been linked to a study within the CRS, but haven't been sent to the author for this review
PUBLISHED IN REVIEW	References that have been published in the review as included, excluded, ongoing or awaiting assessment
SENT	References that have been sent to the author through the tracking screen

Select the tick boxes to display the studies or references of interest (for example, the configuration below will display included studies which are not in CENTRAL). Click “Update” in order to display the records.



Tracking tab

The tracking tab is for displaying the references and studies that have been sent to authors for a review. In this screen, you can choose to display all of the references that have been sent, pending references that have been put through the tracking process but not yet sent to the author, any references that have already been sent, and any that have been sent but not picked up by the author. The references are displayed in a table. You can export this table by clicking on “Export”



You can also click “Send to author” to send the references to the author, remove from tracking if you want to unlink the references from the review, or mark as previously sent. The mark as previously sent option is to link the references to the review without sending the references to the author.

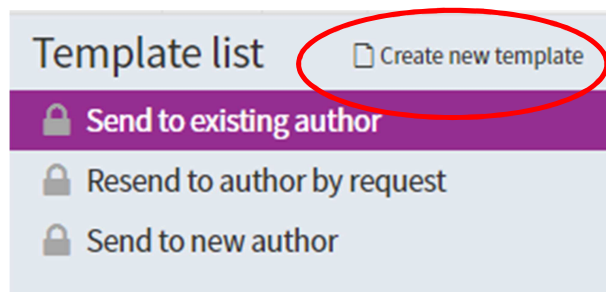
History tab

The history tab is a record of who sent which batch of records to the author, and on which dates they were sent and picked up. Click on any of the lines in the table to get a full list of the records that were sent.

Home use of interdental cleaning devices, in addition to toothbrushing, for preventing and controlling periodontal diseases and dental caries (CD012018) [0312]					
Show: Added Sent to Author					
Date created	User	Added to tracking	Already in review	Already in tracking	Excluded not sent
16 Jan 2019 14:07	Anne Littlewood	301	0	128	0
06 Dec 2018 08:43	Anne Littlewood	16	0	13	0





Email templates


This is where you can set up and store email templates for sending records to authors. There are some prepopulated templates for your use, but you can create your own by clicking on “Create new template”.



From here you can populate the template with standard text, and you can link to Archie for items like the review title, CD number, group name etc. by using the “Insert into content” drop down list. You can save the template for future use, or make a copy.

Email template

 Save  Copy  Delete  Cancel

Name	<input type="text" value="Template name"/>
	<div>Insert into content </div>
To	<input type="text"/>
Cc...	<input type="text"/>
Bcc...	<input type="text"/>
Subject	<input type="text" value="Add your subject..."/>
Content	<input type="text" value="Add your content..."/>

Using email templates is covered in a separate guide on sending records to authors through the tracking screen.

If you have any questions about the tracking screen in the CRS, contact cis-support@cochrane.org.