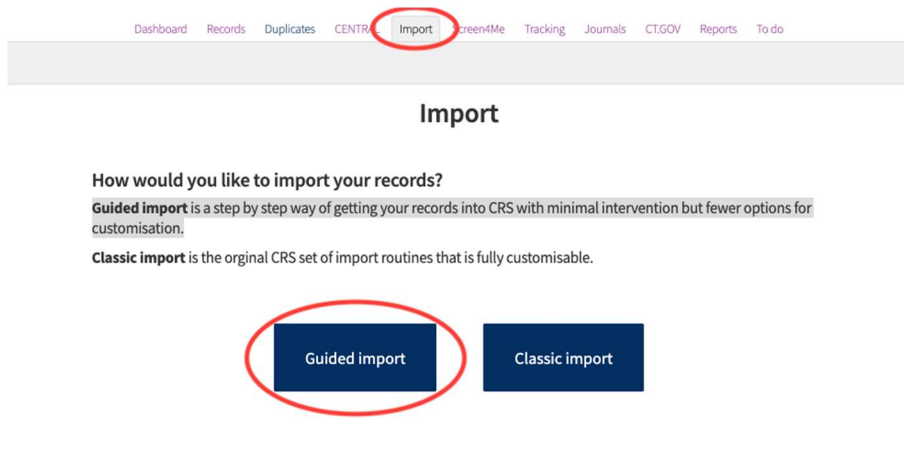Guided import is a step-by-step way of getting your records into CRS with minimal intervention and fewer options for customisation.

CRS will attempt to pick a filter. This can be changed using "Choose another filter."

Please check which filter you need by selecting the 'i' for help, where a link to the preferred filters is available.
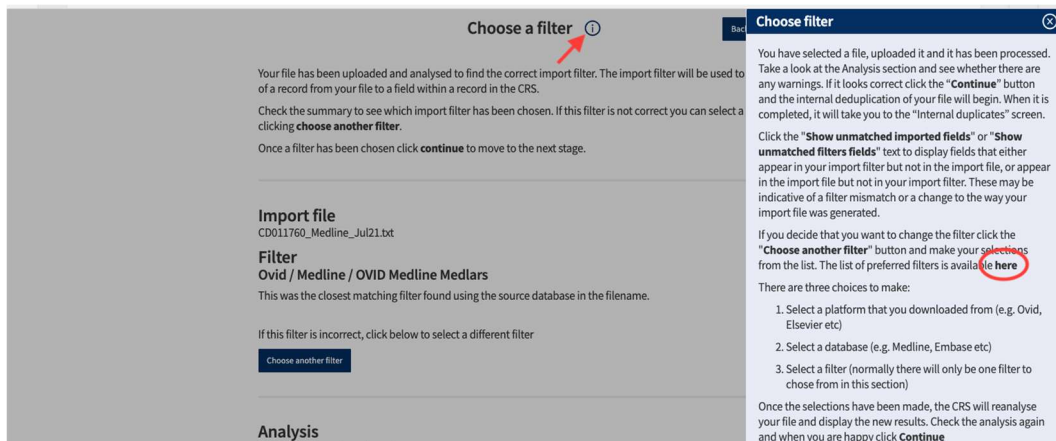
Another great way to check you have the correct filter is to view an example record. This displays one of your imported records as it will appear in CRS. Check that you have the required fields and that they are formatted correctly. Select "Show example record":
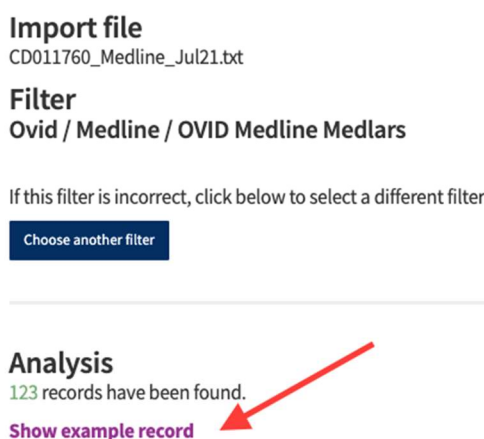
Once you are happy that you have the correct filter, select "Continue". The automatic deduplication routine will then run, and the results will display.

On this screen you have the option to make bulk changes using the buttons at the top:

Mark all as not a duplicate – will bring in your imported records as new and create duplicate copies of the records in CRS

Keep all existing records – will keep the existing CRS record and put this version in your import folder.

Merge using global settings – this will merge all the records using some prespecified settings (these can be changed using 'Edit global settings')

Alternatively, you can select the first three options for each individual record, or select the individual fields you want to keep on each record.

NB it is important to note, that whether you choose to keep the existing CRS record, or merge it, **you will see all your imported records in the folder at the end**. No records will be lost unless there are internal duplicates (i.e. duplicates within the import file itself).

Once you have made your selection, a summary will be displayed.

You can then select "Import", to bring the files in to the CRS based on the decision you made, or you can choose to run an additional deduplication to find additional duplicates not found by the automated routine.

To do this, select the deduplication you want to run, and hit "Run deduplication".

Choose your deduplication filter

There are several default filter to choose from for deduplicating your import file. Each filter contains a different set of fields used to match the imported records to an existing record in the CRSD. You can also use manually created filters to match the imported records.

Pubmed AN_35

Pubmed AN_35

source35 + author4 + year4

title100

title35

title35 + author4

Run deduplication

The filter will dedupe the records using

- The first **100** characters of the **Title** field

You will then get the same options as you did after the automatic deduplication; and the same summary.

This is an iterative process; you can run as many deduplication routines as you like.

When you are happy, click Import below the summary.

Summary

123 records have been uploaded from file: *CD011760_Medline_Jul21.txt*

   1 record will be discarded as it is an exact duplicate within the import file.

122 records will appear in your import file

119 duplicates found, of which:

    37 were exact matches to records in your segment

    82 matched to records in your segment and have already been actioned manually.

  3 new records do not match to any existing CRS record. You can **run a new deduplication** on these 3 records.

You have chosen to only import fields that do not exist in the current CRS record for imported records that have matched to an existing CRS record. These preferences can be updated in the **global settings**.

Import   Run an additional deduplication   Edit global settings

You will get the option to import more records or go to the folder with all your imported records.

If you have any questions about using the Guided Import process, contact cis-support@cochrane.org.