

Quick ref guides Guided import

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

Dashboard	Records Dup		Import creen4	Me Tracking	Journals	CT.GOV	Reports	To do	
			Impor	t					
How would y	ou like to i	mport your re	cords?						
Guided import in customisation.	s a step by ste	o way of getting y	our records into	CRS with min	imal interv	vention b	ut fewer o	options for	
Classic import is	the orginal C	RS set of import r	outines that is fu	lly customisa	ble.				
		Guided imp	ort	Classic i	mport				

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.

	channe filmer
Choose a filter 🕕 🛛 🛛 🖓	Choose filter 🛞
Your file has been uploaded and analysed to find the correct import filter. The import filter will be used to of a record from your file to a field within a record in the CRS.	You have selected a file, uploaded it and it has been processed. Take a look at the Analysis section and see whether there are any warnings. If it looks correct click the " Continue " button and the internal deduplication of your file will begin. When it is completed, it will take you to the "Internal duplicates" screen.
Once a filter has been chosen click continue to move to the next stage.	Click the "Show unmatched imported fields" or "Show unmatched filters fields" text to display fields that either appear in your import filter but not in the import file, or appear in the import file but not in your import filter. These may be
Import file	in the import like but not in your import liker. These may be indicative of a filter mismatch or a change to the way your import file was generated.
Eilter	If you decide that you want to change the filter click the "Choose another filter" button and make your solections from the list. The list of preferred filters is available here
	There are three choices to make:
If this filter is incorrect, click below to select a different filter	1. Select a platform that you downloaded from (e.g. Ovid, Elsevier etc)
	2. Select a database (e.g. Medline, Embase etc)
Choose another filter	 Select a filter (normally there will only be one filter to chose from in this section)
Analusia	Once the selections have been made, the CRS will reanalyse your file and display the new results. Check the analysis again and when you are happy click Continue

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":

Import file CD011760_Medline_Jul21.txt
Filter Ovid / Medline / OVID Medline Medlars
If this filter is incorrect, click below to select a different filter Choose another filter
Analysis 123 records have been found. 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.

		Dedupli	cation re	esults (i)	Back Cancel				
	Summary Res	cults (82) Global settings							
Mark all as not a duplicate Keep all existing records Merge using global settings Edit global settings (82 matching records) Page 1								1 of 9 《 🔇	> >>
	Title	Author	Year	Date published	Source		Volume	Issue	Page
Update CRS Keep	The Effect of Sensorineural Hearing Loss and Tinnitus on Speech Recognition over Air and Bone Conduction Military Communications Headsets	Manning C // Mermagen T // Scharine A	2016		Hearing research		, 2016 Oct 27		
Not a dupe	The effect of sensorineural hearing loss and timitus on speech recognition over air and bone conduction military communications headsets	Manning C // Mermagen T // Scharine A	2017	2017.06	Hearing research		349		67-7

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.

Summary	
123 records hav	e been uploaded from file: CD011760_Medline_Jul21.txt
1 record will b	be discarded as it is an exact duplicate within the import file.
122 records will	appear in your import file
86 duplicates f	ound, of which:
4 were e	exact matches to records in your segment
77 match	ned to records in your segment and have already been actioned manually.
5 match	ned to records elsewhere in CRS and will appear as new in your segment
	s do not match to any existing CRS record. You can run a new deduplication on these 36 records.
	to only import fields that do not exist in the current CRS record for imported records that have isting CRS record. These preferences can be updated in the global settings .
	Import Run an additional deduplication Edit global settings

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	Th			
	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**.



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 <u>cis-</u> <u>support@cochrane.org</u>.