

3ie evidence gap maps platform Automatic importer guide

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Contents

1. Overview	1
1.1 Building a map in the platform	1
1.2 Importer basics	1
1.3 Key things to note about the importers.....	1
1.4 Before starting your evidence gap map.....	2
1.5 Common reasons for import errors – read before importing!	2
1.6 Identifying errors in your import sheet	3
1.7 Important checks following successful import	3
2. Impact evaluation importer	4
2.1 Notes	4
3. Systematic review importer	8
3.1 Notes	8

1. Overview

1.1 Building a map in the platform

You can create new evidence gap maps (EGMs) in the 'User Evidence Maps' tab - > 'Create new evidence map': <http://egmopenaccess.3ieimpact.org/user-evidence-maps>

You can add interventions, outcomes and other categories in the 'Manage taxonomy' tab - > 'Add terms': <http://egmopenaccess.3ieimpact.org/admin/structure/taxonomy>

Once you have added all of the interventions and outcomes for your EGM to the taxonomy lists, you can add them to the EGM project you have created. You do this by clicking on the EGM in 'User Evidence Maps' and then clicking 'Edit'. Select all of the interventions and outcomes you would like in your map and save. You should then see the empty framework.

1.2 Importer basics

There are two importers, one for importing impact evaluations and one for importing systematic reviews. You can find them [here](#).

1. Impact evaluation information should be prepared in the template linked on the impact evaluation importer page, and systematic review information should be prepared in the template linked on the systematic review importer page. Click on the importer you want to work with, then you will see a 'Download a template' link partway down the page. Click on it, and a CSV template should be saved to your downloads directory.
2. Find the saved template file and open it in Excel.
3. Add all the study details you wish to import (see notes below for guidance about how to populate the file). Make sure that you save it as a CSV, not an XLS, file (in your Excel save options). It should have a CSV extension if saved correctly.
4. When you have finished, return to the importer page and click the 'Browse' button to select your prepared file.
5. Click 'Import'. You will see a result summary, listing how many new studies (nodes) have been created and how many have been updated.

1.3 Key things to note about the importers

- You can use the importers to import new studies or to overwrite existing studies. Studies are **matched on the ID field** – so if you create a row in the impact analysis importer template with an ID that matches the ID of an impact analysis that is already loaded into the website, the already loaded version will be overwritten with the new details you are importing.
- If a field is multi-value, you must separate each value with a double pipe – like this || – and leave no whitespace around it.
- Certain fields are restricted in terms of the values that can be imported. For example, regions and countries must be chosen from the list that is configured in the website (see details about each importer for which fields must be populated from a fixed list).

- Other fields will allow you to add new values. For example, if you put outcomes or interventions in the file that do not already exist in the website, they will be created in the site. This requires some care, because if the outcome 'adoption' exists in the website, but you enter 'adoption' (with a space at the front), the study will not be correctly matched to the existing outcome value; rather, a second outcome will be created.
- In the original guidance for the platform, Manta Ray Media suggested that if the study title, full title, study design, or any of the interventions or outcomes have an apostrophe, semicolon, colon or question mark, the exported full field value must be in double quotes. **However, in our experience Excel always adds double quotes automatically for you when it converts to CSV. (Note: You will not see this in the CSV itself, but if you open in a notepad file you will see quotes added.) We suggest not adding double quotes unless a problem arises when importing.**

1.4 Before starting your evidence gap map

The easiest way to avoid problems when importing into the platform is to use dropdowns or restricted entry cells in Excel® when coding included studies on interventions and outcomes or other categories. This will avoid lots of fiddling later to harmonise spelling for import into the platform.

Putting outcomes or interventions into the import file that are not spelled exactly the same as the categories in your map will result in additional (incorrect) interventions and outcomes being created in the platform. Incorrectly coded studies will then no longer appear in your EGM. The key categories are intervention, outcome and population (if using), as well as publication date, regions, countries and study design.

1.5 Common reasons for import errors – read before importing!

1.5.1 *There are special characters in the import sheet*

By far the most common reason for the importer to fail is because of special characters in the import sheet that are not recognised in the platform. Special characters cause the importer to stop importing at the entry that contains the special character. These characters are often found in the long and short titles fields in the importer sheets when the titles are copied and pasted directly from a PDF or online article. The importer also counts accents, typically found in authors' names, as special characters.

The easiest method to identify and change the special characters is to do a find and replace in your Excel import sheet for each of the potential characters before you try importing. This will take a bit of extra time, but you will be far more likely to get a successful import on your first attempt. Here are characters that often cause problems:

- **Smart quotes:** This is a smart quote ' whereas this ' is a regular quote. Find and replace all of the smart quotes with regular quotes.
- **Long dashes:** This is a long dash — whereas this is a - short dash. Find and replace all of the long dashes with the shorter version.
- **Accents:** For letters with accents (e.g. ó, õ, ô, č, á, í, ì, ú, ñ, é, è), find and replace all of the letters with the non-accented version. Manually add the

accented characters back into the relevant entries in the platform as necessary after importing.

- **Others:** Other common special characters that result from copying titles from webpages include: ™, © and ®. Remove these from the sheet.

1.5.2 There are errors in the publication date format

The publication date in the CSV needs to be in this format to import successfully: 01-Feb-13

1.5.3 The wrong delimiter in the importer is selected

The delimiter in the impact evaluation and systematic review importer should always be set to comma (,) when using CSV to import. This is sometimes changed (accidentally or because the delimiter you see in the CSV is || rather than a comma). However, the importer will not import if a delimiter other than comma is selected.

1.5.4 There are lines with missing fields or incorrect values

See the field and example tables below for examples of missing fields or use of incorrect values for a category with fixed responses. These will not always result in import errors, however. They may just create additional (incorrect) categories in the taxonomy.

1.6 Identifying errors in your import sheet

Even if you have followed the guidance above, it is possible you will have missed an error in your import sheet and you will get an error message when you try to import. After attempting to import a CSV but receiving an error message, the easiest way to identify the line of coding with the error is to do the following actions:

- Go into the 'Manage studies' tab in the platform.
- Search in the ID box for the identifier you have chosen to use for studies in your EGM; for example, 'E4PIE' for all impact evaluations in the evidence for peacebuilding gap map. This will give you a list of all the studies that have been successfully imported.
- Sort by ID and you will be able to see the last study that successfully imported for your map. The error will therefore be in the next entry in your import sheet.
- Once you have found and corrected the error, re-import and follow this process again if necessary.

1.7 Important checks following successful import

Just because your import sheets have imported successfully, this does not mean all studies will appear in your EGM. A common reason is incorrectly spelled interventions or outcomes in your import sheet. If there are interventions or outcomes spelled incorrectly for one or more studies in your import sheet, the platform will create a new intervention or outcome in the taxonomy for each incorrectly spelled entry, and the study will instead attach to this new incorrectly spelled intervention or outcome. **This includes when there is an additional space before or after the name of your intervention or outcome.**

The best way to prevent this from happening is to use dropdowns in your Excel sheet when coding for the EGM to avoid human error in entering names of interventions or outcomes. However, the easiest way to see if this has happened is to look at your particular interventions and outcomes in the 'Manage taxonomy' tab in the platform and

check if additional interventions/outcomes have been created that are slightly different than the intended; for example, they have an extra space in the name or have one letter missing. You can then see which studies have attached to this wrong intervention or outcome so you can go back to your coding sheet and correct.

Another important check is to determine whether there are interventions or outcomes in another EGM in the platform with the same intervention or outcome name as in yours. This is important, as the platform has one shared library of interventions and outcomes for all maps. You need to make sure that your intervention and outcome names are differentiated in some way from those in the platform already, or importing studies may result in the studies attaching to the wrong intervention or outcome for a different map. Note: They will not appear in the other map that shares interventions and outcomes with your EGM, as they are not tagged to that map. However, they will not appear in your map either. Alternatively, you can use the same intervention or outcome from an existing map and add to your framework. However, this requires that you use the same definition as the intervention or outcome in the other map.

2. Impact evaluation importer

2.1 Notes

Note that although some fields are not required in order for the importer to run successfully, missing fields will have an impact on the functionality of the EGM (such as filters and links in the hover-over).

Note also that the 'Allowed values' list is correct at the time of writing this document. Lists can be updated by the system administrator, so check if in doubt.

Table 1: Description of impact evaluation importer fields

Column	Description	Required?	Multi-value? (must be separated with a)	Allowed values (if applicable)
ID	The ID of the study. This field is used to remove duplicates. In the downloaded template file, there may be two ID columns. You can either delete one column entirely or replicate the study ID in each column. Do not leave one of the columns blank.	YES	NO	
Title	The title of the study as it will appear in the hover-over box on the EGM.	YES	NO	
Full title	This can be a longer title or description of the study.	NO	NO	
Publication date	Must be in this format: 26-Feb-15	YES	NO	
Maps	The list of maps that this study should appear in. Maps will be matched based on the title.	YES	YES	Must match the title of an existing map.

Study design	Any value added here that is not already in the website will be created. Examples: <ul style="list-style-type: none"> • Propensity score matching or PSM • Randomised controlled trial or RCT 			
Regions	Must match the regions configured in the website.	NO	YES	<ul style="list-style-type: none"> • CIS • East Asia and Pacific • Europe • Latin America and the Caribbean • Middle East and North Africa • South Asia • Sub-Saharan Africa
Countries	The countries the study took place in.	NO	YES	
Population	The population category/ies included in the study. Examples: <ul style="list-style-type: none"> • Extreme poor • Food insecure 	NO	YES	
Interventions	Any value added here that is not already in the website will be created.	YES	YES	
Outcomes	Any value added here that is not already in the website will be created.	YES	YES	
Link	This field should contain the link to the study page on the existing 3ieimpact.org website. It should be the full URL, including the http:// prefix.	NO	NO	

Table 2: Impact evaluation importer examples (with common errors highlighted in red)

	ID	Title	Full title	Publication date	Maps	Authors	Review design	Regions	Population	Confidence level	Number of impact evaluations	Interventions	Outcomes	Link
Good example	EPG MS4	The Effects of School-Based Decision Making	The Effects of School-Based Decision-Making on Educational Outcomes in Low- and Middle-Income Contexts: A Systematic Review	26-Feb-15	Productive safety nets	Roy Carr-Hill, Caine Rolleston, Tejendra Pherali, Rebecca Schendel	Effectiveness review	CIS East Asia and Pacific	Extreme poor	High	5	Access	Adoption	http://www.3ieimpact.org/en/evidence/systematic-reviews/details/311/
Missing ID		The Effects of School-Based Decision-Making	The Effects of School-Based Decision-Making on Educational Outcomes in Low- and Middle-Income Contexts: A Systematic Review	26-Feb-15	Productive safety nets	Roy Carr-Hill, Caine Rolleston, Tejendra Pherali, Rebecca Schendel	Effectiveness review	CIS East Asia and Pacific	Extreme poor	High	5	Access	Adoption	http://www.3ieimpact.org/en/evidence/systematic-reviews/details/311/
Missing map	EPG MS4	The Effects of School-Based Decision-Making	The Effects of School-Based Decision-Making on Educational Outcomes in Low- and Middle-Income Contexts: A Systematic Review	26-Feb-15		Roy Carr-Hill, Caine Rolleston, Tejendra Pherali, Rebecca Schendel	Effectiveness review	CIS East Asia and Pacific	Extreme poor	High	5	Access	Adoption	http://www.3ieimpact.org/en/evidence/systematic-reviews/details/311/
Incorrect multi-value separators	EPG MS4	The Effects of School-Based Decision-Making	The Effects of School-Based Decision-Making on Educational Outcomes in Low- and Middle-Income Contexts: A Systematic Review	26-Feb-15	Productive safety nets	Roy Carr-Hill, Caine Rolleston, Tejendra Pherali, Rebecca Schendel	Effectiveness review	CIS East Asia and Pacific	Extreme poor	High	5	Access	Adoption, Agricultural expenditure	http://www.3ieimpact.org/en/evidence/systematic-reviews/details/311/
Whitespace around values in multi-value fields	EPG MS4	The Effects of School-Based Decision Making	The Effects of School-Based Decision-Making on Educational Outcomes in Low- and Middle-Income Contexts: A Systematic Review	26-Feb-15	Productive safety nets	Roy Carr-Hill, Caine Rolleston, Tejendra Pherali, Rebecca Schendel	Effectiveness review	CIS East Asia and Pacific	Extreme poor	High	5	Access	Adoption Agricultural expenditure	http://www.3ieimpact.org/en/evidence/systematic-reviews/details/311/

Values that do not exist in preconfigured list	EPG MS4	The Effects of School-Based Decision-Making	The Effects of School-Based Decision-Making on Educational Outcomes in Low- and Middle-Income Contexts: A Systematic Review	26-Feb-15	Productive safety nets	Roy Carr-Hill, Caine Rolleston, Tejendra Pherali, Rebecca Schendel	Effectiveness review	CIS East Asia and Pacific	Extreme poor	Good	5	Access	Adoption	http://www.3ieimpact.org/en/evidence/systematic-reviews/details/311/
Non-numeric value in number field	EPG MS4	The Effects of School-Based Decision-Making	The Effects of School-Based Decision-Making on Educational Outcomes in Low- and Middle-Income Contexts: A Systematic Review	26-Feb-15	Productive safety nets	Roy Carr-Hill, Caine Rolleston, Tejendra Pherali, Rebecca Schendel	Effectiveness review	CIS East Asia and Pacific	Extreme poor	High	FIVE	Access	Adoption	http://www.3ieimpact.org/en/evidence/systematic-reviews/details/311/
Ambiguous date	EPG MS4	The Effects of School-Based Decision-Making	The Effects of School-Based Decision-Making on Educational Outcomes in Low- and Middle-Income Contexts: A Systematic Review	02/03/2012	Productive safety nets	Roy Carr-Hill, Caine Rolleston, Tejendra Pherali, Rebecca Schendel	Effectiveness review	CIS East Asia and Pacific	Extreme poor	High	5	Access	Adoption	http://www.3ieimpact.org/en/evidence/systematic-reviews/details/311/
Incorrect link format	EPG MS4	The Effects of School-Based Decision-Making	The Effects of School-Based Decision-Making on Educational Outcomes in Low- and Middle-Income Contexts: A Systematic Review	26-Feb-15		Roy Carr-Hill, Caine Rolleston, Tejendra Pherali, Rebecca Schendel	Effectiveness review	CIS East Asia and Pacific	Extreme poor	High	5	Access	Adoption	www.3ieimpact.org/en/evidence/systematic-reviews/details/311/

3. Systematic review importer

3.1 Notes

Note that although some fields are not required in order for the importer to run successfully, missing fields will have an impact on the EGM's functionality (such as filters and links in the hover-over).

Note also that the 'Allowed values' list is correct at the time of writing this document. Lists can be updated by the system administrator, so check if in doubt.

Table 3: Description of systematic review importer fields

Column	Description	Required?	Multi-value? (must be separated with a)	Allowed values (if applicable)
ID	The ID of the study field is used for finding and removing duplicates. In the downloaded template file, there may be two ID columns. You can either delete one column entirely or replicate the study ID in each column. Do not leave one of the columns blank.	YES	NO	
Title	The title of the study as it will appear in the hover-over box on the EGM.	YES	NO	
Full title	This can be a longer title or description of the study.	NO	NO	
Publication date	Required format: 26-Feb-15	YES	NO	
Maps	The list of maps that this study should appear in. Maps will be matched by title.	YES	YES	Must match the title of an existing map.
Authors	The authors of the study.	NO	NO	
Review design	Any value added here that is not already in the website will be created.	NO	NO	<ul style="list-style-type: none"> • Difference-in difference (DID) • Instrumental variable (IV) • Propensity score matching (PSM) • Randomised control trial (RCT) • Regression discontinuity design (RDD) • Mixed methods • Others

Regions	Must match the regions configured in the website.	NO	YES	<ul style="list-style-type: none"> • CIS • East Asia and Pacific • Europe • Latin America and the Caribbean • Middle East and North Africa • South Asia • Sub-Saharan Africa
Population	The population category/ies included in the study. Examples: <ul style="list-style-type: none"> • Extreme poor • Food insecure 	NO	YES	
Confidence level		YES	NO	<ul style="list-style-type: none"> • High • Low • Medium • Protocol
Number of impact evaluations	Must be a number.	NO	NO	
Interventions	Any value added here that is not already in the website will be created.	YES	YES	
Outcomes	Any value added here that is not already in the website will be created.	YES	YES	
Link	This field should contain the link to the study page on the existing 3ieimpact.org website. It should be the full URL, including the http:// prefix.	NO	NO	

Table 4: Systematic review importer examples (with common errors highlighted in red)

	ID	Title	Full title	Publication date	Maps	Authors	Review design	Regions	Population	Confidence level	Number of impact evaluations	Interventions	Outcomes	Link
Good example	EPG MS4	The Effects of School-Based Decision-Making	The Effects of School-Based Decision-Making on Educational Outcomes in Low- and Middle-Income Contexts: A Systematic Review	26-Feb-15	Productive safety nets	Roy Carr-Hill, Caine Rolleston, Tejendra Pherali, Rebecca Schendel	Effectiveness review	CIS East Asia and Pacific	Extreme poor	High	5	Access	Adoption	http://www.3ieimpact.org/en/evidence/systematic-reviews/details/311/
Missing ID		The Effects of School-Based Decision-Making	The Effects of School-Based Decision-Making on Educational Outcomes in Low- and Middle-Income Contexts: A Systematic Review	26-Feb-15	Productive safety nets	Roy Carr-Hill, Caine Rolleston, Tejendra Pherali, Rebecca Schendel	Effectiveness review	CIS East Asia and Pacific	Extreme poor	High	5	Access	Adoption	http://www.3ieimpact.org/en/evidence/systematic-reviews/details/311/
Missing map	EPG MS4	The Effects of School-Based Decision-Making	The Effects of School-Based Decision-Making on Educational Outcomes in Low- and Middle-Income Contexts: A Systematic Review	26-Feb-15		Roy Carr-Hill, Caine Rolleston, Tejendra Pherali, Rebecca Schendel	Effectiveness review	CIS East Asia and Pacific	Extreme poor	High	5	Access	Adoption	http://www.3ieimpact.org/en/evidence/systematic-reviews/details/311/
Incorrect multi-value separators	EPG MS4	The Effects of School-Based Decision-Making	The Effects of School-Based Decision-Making on Educational Outcomes in Low- and Middle-Income Contexts: A Systematic Review	26-Feb-15	Productive safety nets	Roy Carr-Hill, Caine Rolleston, Tejendra Pherali, Rebecca Schendel	Effectiveness review	CIS East Asia and Pacific	Extreme poor	High	5	Access	Adoption, Agricultural expenditure	http://www.3ieimpact.org/en/evidence/systematic-reviews/details/311/
Whitespace around values in multi-value fields	EPG MS4	The Effects of School-Based Decision-Making	The Effects of School-Based Decision-Making on Educational Outcomes in Low- and Middle-Income Contexts: A Systematic Review	26-Feb-15	Productive safety nets	Roy Carr-Hill, Caine Rolleston, Tejendra Pherali, Rebecca Schendel	Effectiveness review	CIS East Asia and Pacific	Extreme poor	High	5	Access	Adoption Agricultural expenditure	http://www.3ieimpact.org/en/evidence/systematic-reviews/details/311/

Values that do not exist in preconfigured list	EPG MS4	The Effects of School-Based Decision-Making	The Effects of School-Based Decision-Making on Educational Outcomes in Low- and Middle-Income Contexts: A Systematic Review	26-Feb-15	Productive safety nets	Roy Carr-Hill, Caine Rolleston, Tejendra Pherali, Rebecca Schendel	Effectiveness review	CIS East Asia and Pacific	Extreme poor	Good	5	Access	Adoption	http://www.3ieimpact.org/en/evidence/systematic-reviews/details/311/
Non-numeric value in number field	EPG MS4	The Effects of School-Based Decision-Making	The Effects of School-Based Decision-Making on Educational Outcomes in Low- and Middle-Income Contexts: A Systematic Review	26-Feb-15	Productive safety nets	Roy Carr-Hill, Caine Rolleston, Tejendra Pherali, Rebecca Schendel	Effectiveness review	CIS East Asia and Pacific	Extreme poor	High	FIVE	Access	Adoption	http://www.3ieimpact.org/en/evidence/systematic-reviews/details/311/
Ambiguous date	EPG MS4	The Effects of School-Based Decision-Making	The Effects of School-Based Decision-Making on Educational Outcomes in Low- and Middle-Income Contexts: A Systematic Review	02/03/2012	Productive safety nets	Roy Carr-Hill, Caine Rolleston, Tejendra Pherali, Rebecca Schendel	Effectiveness review	CIS East Asia and Pacific	Extreme poor	High	5	Access	Adoption	http://www.3ieimpact.org/en/evidence/systematic-reviews/details/311/
Incorrect link format	EPG MS4	The Effects of School-Based Decision-Making	The Effects of School-Based Decision-Making on Educational Outcomes in Low- and Middle-Income Contexts: A Systematic Review	26-Feb-15		Roy Carr-Hill, Caine Rolleston, Tejendra Pherali, Rebecca Schendel	Effectiveness review	CIS East Asia and Pacific	Extreme poor	High	5	Access	Adoption	www.3ieimpact.org/en/evidence/systematic-reviews/details/311/