DistillerSR Tutorial

Website: http://systematic-review.net/

Login: https://systematic-review.ca/Login/Login.php

What is DistillerSR?

- DistillerSR is an **online application designed specifically for the screening and data extraction** phases of a systematic review or scoping review.

Main Interface

❶ Switch between projects

❷ Screen references or extract data

❸ Run queries

❹ Run reports (*e.g.*, article status, kappa)

❺ Upload/edit/quarantine/deduplicate references and upload attachments (e.g., PDFs)

❻ Create or edit forms

❼ Manage levels and keyword highlighting

Main Interface

⌘ DistillerSR

❶

Project   Scoping_ScS (Switch)   User Mai.Ph
Messages   Nothing new

Live Support   User Guide

| Review ▾ | Datarama | Reports ▾ | References ▾ | Forms ▾ | Manage Levels ▾ | Users ▾ | Project ▾ | Logout |
| ❷ | ❸ | ❹ | ❺ | ❻ | ❼ | | | |

My Tasks   Project Progress

Relevance Screening Tool 1   Relevance Sc
1 references to review

Data Characterization and Utility
112 references to review

Creating a new form

1. Select **Forms**
2. Select **Edit Forms**
3. Select **Add a new form**
4. Select the **Edit** icon (first icon, looks like a sheet of paper with a pencil) under the **Edit/View/Delete** column
5. Under **Name**, give the form a name
6. Select **Save Form Settings**

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Add/edit a question in a form

1. Select **Add a question**
2. Select **Edit question**
3. In the text box, enter question
4. Under **Question Options**, select question type (*e.g.*, text, checkbox, radio) or other specification (if applicable)
5. Once finished, select **Save**

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Add/edit a question in a form

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Add/edit an answer in a form
(If question type is radio or checkbox)

1. Select **Edit Answers**
2. Under **Answer**, type response options
3. If applicable, select **Type** (neutral (default), include, or exclude)
4. If response option has text, select check box under **Has Text**
5. Select **Save**

Add/edit an answer in a form

Setting up levels

1. Select **Manage Levels**
2. Select **Setup Your Levels**
3. Drag-and-drop form into desired level
4. Select **Save flow**
5. Ensure that the level box is highlighted (dashed line)
6. Under **Level Settings**, specify settings (*i.e.*, name, type, agreement level, users)
7. Select **Save**

Setting up article flow

1. Ensure that the form box is highlighted (dashed line)
2. Under **Level Specific Form Settings**, specify settings (*i.e.*, whether optional, display options, assign users)
3. Select **Save**

Uploading references

1. Select **References**
2. Select **Upload references**
3. Follow steps 1 – 4
   - Note: file must be a text file (.txt) and each reference in the file must begin with the Reference ID

Sidebar: Setting up bibliographic format in RefWorks

1. Select **Bibliography**
2. Under **Output Style**, Select **New**
3. Under **Name**, enter a title for the new output style (*e.g.*, DistillerSR)
4. Use the ⊳ button to add fields to the output style. Ensure that Reference ID is the first field under **Output Field Order**
5. Select **Save**

17
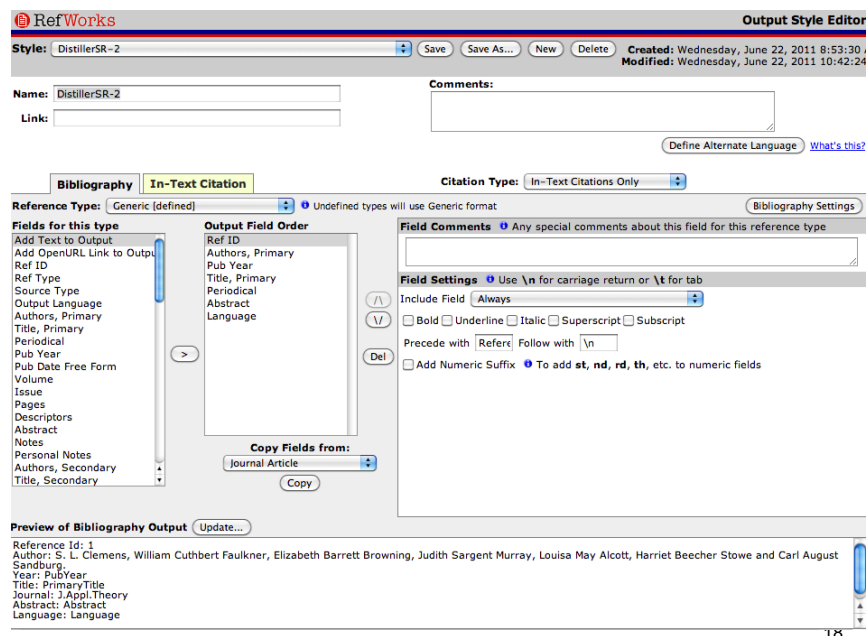
18

Sidebar: Exporting references from RefWorks

1. Select **View**
2. Select to view **All References** or by **Folder**
3. Select references (*i.e.*, all in list, page or selected)
4. Select **Print**
5. Under **Output Style**, select the newly created output style (*e.g.*, DistillerSR)
6. Select **Print**
7. Select **Click here to view the reference list** or send list to e-mail
8. Ensure that the list is saved as a text file (.txt)
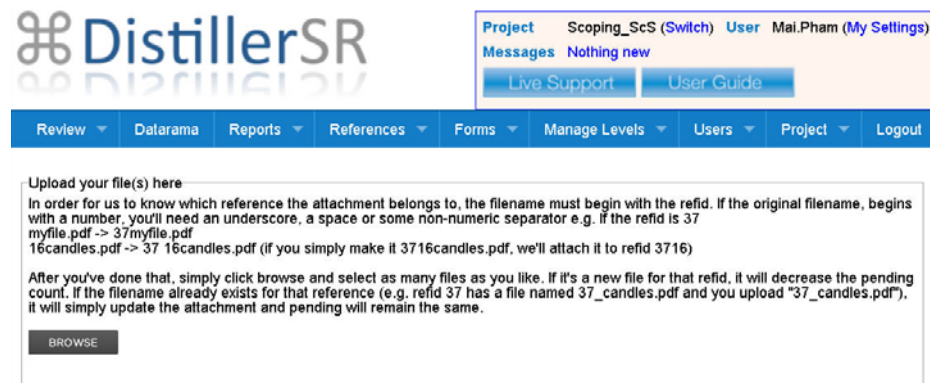
19

Sidebar: Exporting references from RefWorks
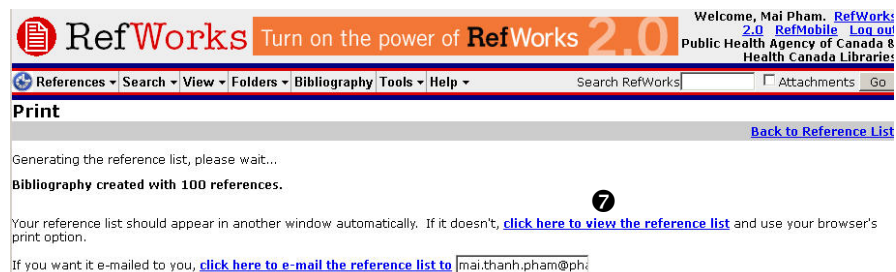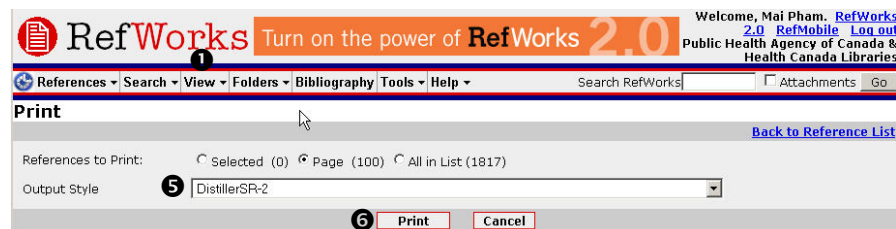
Uploading PDF attachments

1. Select **References**
2. Select **Multiple Attachment Upload**
3. Select **Browse**
4. Attachments will upload automatically once files are selected
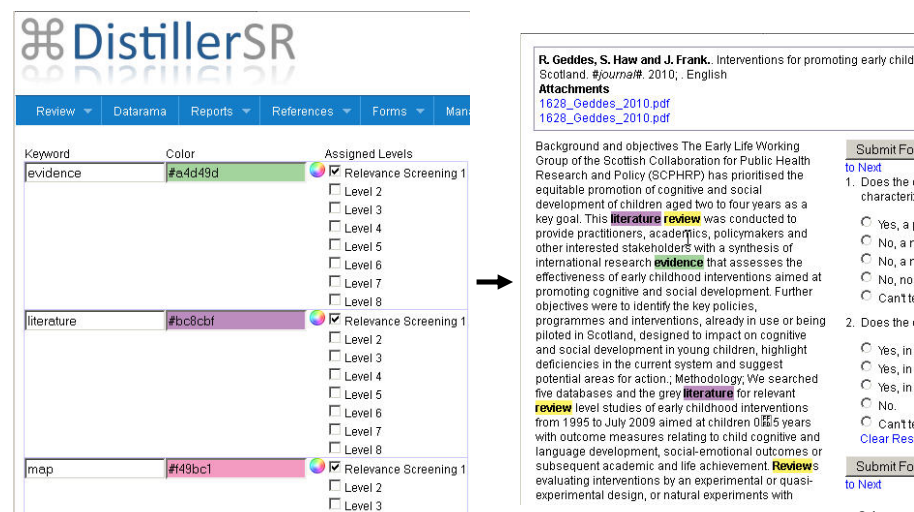   - Note: PDF file names must begin with the Reference ID

Uploading PDF attachments

Highlighting keywords

1. Select **Manage Levels**
2. Select **Keyword Highlighting**
3. Enter word(s) and select desired colour and level

Highlighting keywords

Editing references

1. Select **References**
2. Select **Edit References**
3. Search for reference
4. Once desired reference has been found, select **Edit Article**
5. Make desired edits
6. Select **Save**

Editing references

Quarantining references

1. Select **References**
2. Select **Edit References**
3. Search for reference
4. Once desired reference has been found, select **Quarantine Reference**
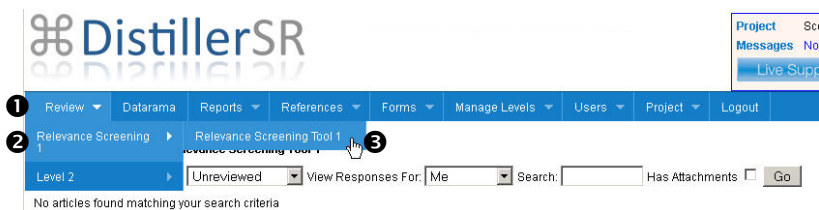5. Specify reason for quarantine
6. Select **OK**

Quarantining references

Reviewing references for relevance screening or data extraction

1. Select **Review**
2. Select level (*e.g.*, relevance screening 1)
3. Select form (*e.g.*, relevance screening tool 1)

How to change your responses after submission

One way is to essentially repeat the steps you would take to submit a response for the first time:

1. Select **Review**
2. Select level (*e.g.*, relevance screening 1)
3. Select form (*e.g.*, relevance screening tool 1)

Note: By default, DistillerSR only displays unreviewed references.

How to change your responses after submission
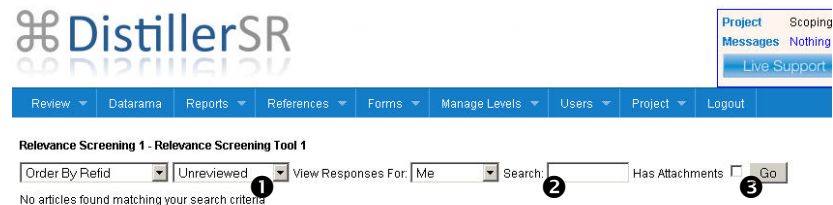
1. Make sure to change the first dropdown menu to either **All references** or **Reviewed**.
2. If desired, search by Ref ID, author or some other field.
3. Select **Go**. Then follow original steps.

Note: You can also change responses when viewing conflicts between reviewers (see later slides).

To view article status

1. Select **Reports**
2. Select **Article Status**

To view article status

Numbers can be selected to view the references in which they are enumerating.

Example #1:
Select the number under the **Included** column to view articles which have been included at the abstract relevance screening level (also useful for obtaining a list of references for which to procure full-text articles).

Example #2:
Selecting the number under the **Conflict** column is one way to view conflicts between reviewers.

To view user workload/progress

1. Select **Reports**
2. Select **User Workload**
3. Select level
4. Select form

Why run a query?

Run a query to:
- View conflicts
- View user responses
- Filter articles by responses
- And more…

Running a query to view conflicts between reviewers

Running a query

1. Select **Datarama**
2. Under **Data to Display**, select level from which to display data. (E.g., To view conflicts at the abstract relevance screening level, select **Relevance Screening 1**)
3. Under **Report Format**, can select whether to view data online in DistillerSR, in an Excel spreadsheet, Word document, CVS format or RIS format.
4. Under **Disagreements**, can select:
   - A. **Show all data** (to view all responses, both agreements and disagreements)
   - B. **Inclusion/Exclusion conflicts** (to view disagreements only at the inclusion/exclusion level)
   - C. **All conflicts except text** (to view all disagreements except for those in text boxes)
   - D. **All conflicts including text** (to view all disagreements, including those in text boxes)

Running a query

5. Under **Bibliographic Format**, can select whether to only view the Ref IDs (**No Custom Format**) for the data, or a desired bibliographic format (e.g., AMA, APA, Chicago, MLA, etc.)
6. Under **Filter Articles by Responses**, can view data for a particular question or response by selecting **Add to query**.
   (Note: Can view data for more than one response by enclosing each query in parentheses ("()") and placing an "AND" or "OR" between the queries)
7. Select **Run Report**

Running a query to view conflicts between reviewers

Running a query to view conflicts between reviewers

1. Select **Datarama**
2. Under **Data to Display**, select the level for which you want to view conflicts.
3. To view conflicts in DistillerSR, the default option under **Report Format** is **View Online**. To view conflicts in another format (e.g., Excel spreadsheet, Word document), select the appropriate option from the dropdown menu.
4. Under **Disagreements**, select whether to view all conflicts or only conflicts at the inclusion/exclusion level.
5. If desired, select a format under **Bibliographic Format**.
6. If you are only interested in viewing conflicts for a particular question, select **Add to query** under **Filter Articles by Responses**.
7. Hit **Run Report**

View conflicts between reviewers

Example: Changing a response after conflict resolution

Example: After reviewing her conflicts with Judy, Mai wants to change her response for Ref ID 507 from **No, none of the above** to **No, a narrative review of scoping studies**.

1. Mai would select her response for Ref ID 507.
2. The review screen for Ref ID 507 will open and she would simply change her response and hit **Submit Form**.

Final notes

- Many more options and tools available in DistillerSR
- For DistillerSR help:
    1. Select **User Guide** for online manual
    2. Select **Live Support** for live online support

Links

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