

# 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.

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## Main Interface

- 1 Switch between projects
- 2 Screen references or extract data
- 3 Run queries
- 4 Run reports (e.g., article status, kappa)
- 5 Upload/edit/quarantine/deduplicate references and upload attachments (e.g., PDFs)
- 6 Create or edit forms
- 7 Manage levels and keyword highlighting

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## Main Interface

The screenshot displays the DistillerSR web application interface. At the top, there is a navigation bar with the DistillerSR logo and a user profile section for 'Scoping\_ScS' with options for 'Switch', 'User', and 'Mail.Ph'. Below this is a main menu with items: Review, Datarama, Reports, References, Forms, Manage Levels, Users, Project, and Logout. A secondary menu below the main one contains 'My Tasks' and 'Project Progress'. The 'Project Progress' section shows two items: 'Relevance Screening Tool 1' with '1 references to review' and 'Data Characterization and Utility' with '112 references to review'. A footer at the bottom contains copyright information: 'Copyright © 2010, Evidence Partners, All Rights Reserved. This page took 0.052 seconds to load.'

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# 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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Project: Pet\_surrender (Switch) User: Mai.Pham (My Settings)  
Messages: Nothing new  
Live Support | User Guide

Review | Datarama | Reports | References | Forms | Manage Levels | Users | Project | Logout

3 Add a new form

Form Name	Forms Completed	Number of Questions	Edit / View / Delete
New Form	0	0	  

4

Add A Question | Preview Form | Preview Form without Abstract | Clone Some Questions

Form Settings:

Name:  5

Short Name:

6 Save Form Settings

Bulk Actions:

Choose an action to perform on checked questions

#	Question	Type	Bulk	Key
---	----------	------	------	-----

# 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

Question Editor

Rich text editor toolbar: Bold, Italic, Underline, ABC, Styles, Paragraph, Font family, Font size

New Question

Question Options:

Type: Text

Export Header:

Hide Numbering

One Line Question

Mandatory

Key Question

Initially Hidden

No Validation

Rows: 1 Cols: 30

Cancel Save

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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**

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## Add/edit an answer in a form

Answer	Type	Has Text	Order	Export Header	Actions
<input type="text"/>	Neutral	<input type="checkbox"/> No Validation			
<input type="text"/>	Neutral	<input type="checkbox"/> No Validation			
<input type="text"/>	Neutral	<input type="checkbox"/> No Validation			
<input type="text"/>	Neutral	<input type="checkbox"/> No Validation			

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## 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**

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Review ▾ | Datarama | Reports ▾ | References ▾ | Forms ▾ | Manage Levels ▾ | Users ▾ | Project ▾ | Logout

### Settings

6 Level Settings

Level Name: Relevance Screening 1

Type:  Screening  Data Extraction

Agreement Level [?]:  Form  Question  Answer

Disagreement Result [?]:  Include  Conflict

Users Needed To Exclude [?]: 2

Users Needed To Process [?]: 2

Users Assigned and Refid Partitioning [?]:

<input type="checkbox"/>	andrijana.rajic	
<input type="checkbox"/>	barbara.wilhelm	
<input checked="" type="checkbox"/>	ian.young	
<input checked="" type="checkbox"/>	judy_greig	
<input type="checkbox"/>	Lisa.Waddell	
<input checked="" type="checkbox"/>	Mai.Pham	
<input type="checkbox"/>	Mariola.Mascarenhas	
<input type="checkbox"/>	Mia.Cikovic	
<input type="checkbox"/>	Robin.Bates	
<input type="checkbox"/>	Zee.Leung	
<input type="checkbox"/>	Unassigned	

### Article Flow

1 Relevance Screening 1

2 Relevance Screening Tool 1

3 Data Characterization and Utility

Level 2

Level 3

Level 4

Level 5

Level 6

Level 7

Level 8

4 Save Flow

### Reusable Forms (drag these onto levels)

5 Relevance Screening Tool 1

6 Data Characterization and Utility

7 Save

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## 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**

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The screenshot shows the 'Settings' page for 'Article Flow'. The 'Level Specific Form Settings' section on the left includes options for 'Repeatable' (Single/Multiple Submissions), 'Optional Form' (No/Yes), 'Display' (Show/Hide Abstract), 'Bibliographic Format' (Text), 'Enable Title Screening' (Yes/No), and 'Randomize Refid Order'. The 'Article Flow' section on the right shows a vertical stack of levels (Level 1 to Level 8). Level 1 is currently set to 'Relevance Screening 1' and is highlighted with a dashed red box and a circled '1'. Level 2 is set to 'Data Characterization and Utility'. A 'Save Flow' button is at the bottom. On the right, a 'Reusable Forms' panel shows 'Relevance Screening Tool 1' and 'Data Characterization and Utility' forms. A 'Save' button at the bottom left is highlighted with a dashed green box and a circled '3'.

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## 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

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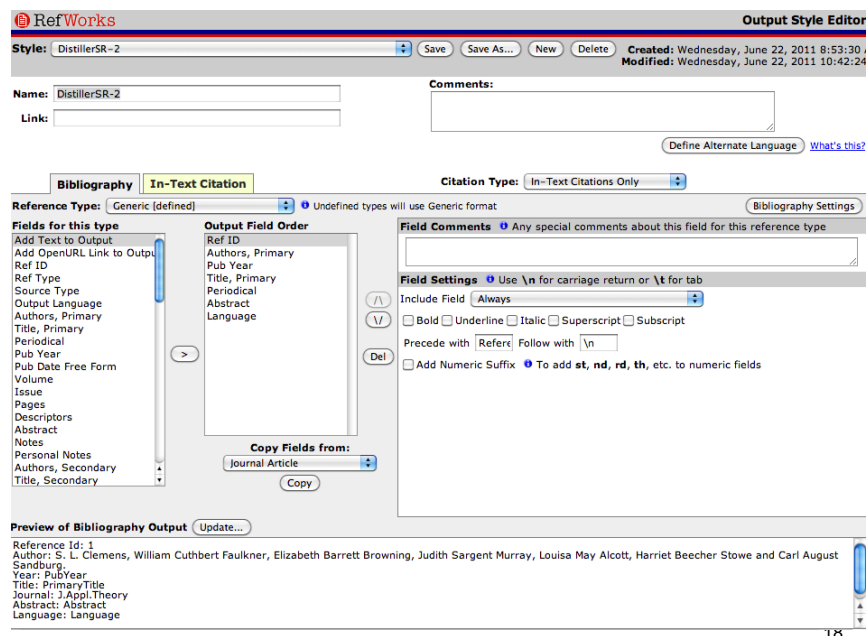
The screenshot shows the 'References' page in DistillerSR. The 'Project' dropdown is set to 'Scoping\_ScS (Switch)' and the 'User' is 'Mai.Pham (My Settings)'. The 'References' section is active. The 'Step 1' section has a 'Choose File' button. The 'Step 2' section has a text input field. The 'Step 3' section has radio buttons for 'Skip existing and notify' (selected) and 'Overwrite existing'. The 'Step 4' section has a 'Begin Upload' button. The 'Output Filters' section shows 'Filters (Right-click -> save as...)' with options for 'EndNote', 'ProCite', and 'Reference Manager'. The 'Reference Id' field is highlighted with a dashed red box.

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## 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**

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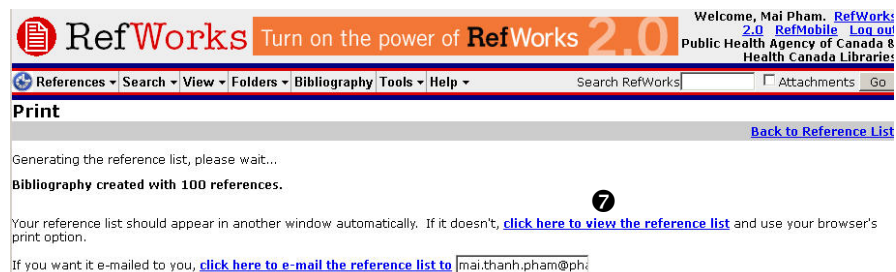
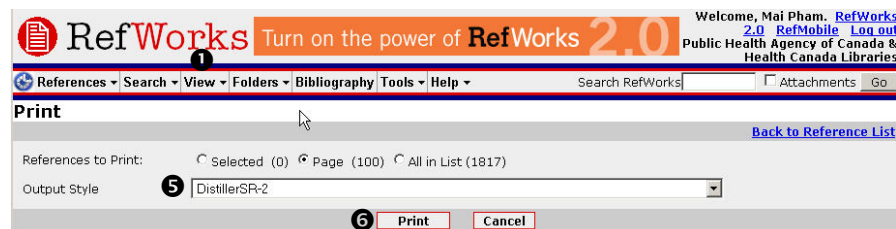
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## Sidebar: Exporting references from RefWorks

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)

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## Sidebar: Exporting references from RefWorks

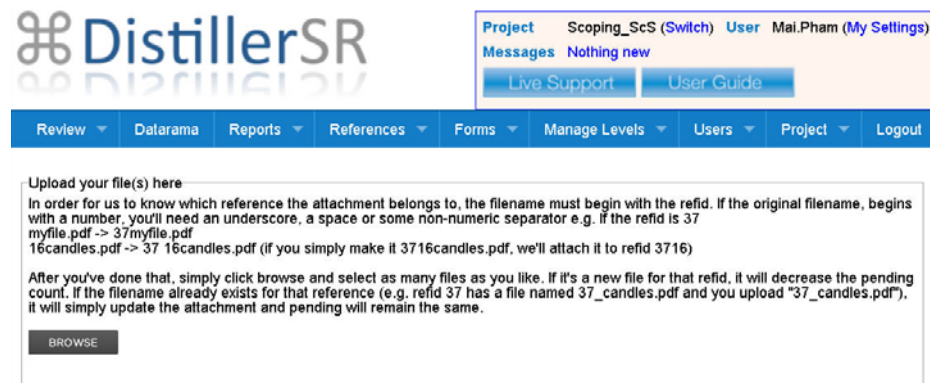


# Uploading PDF attachments

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

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# Uploading PDF attachments



The screenshot shows the DistillerSR web interface. At the top, there's a navigation bar with 'Project Scoping\_ScS (Switch) User Mai.Pham (My Settings) Messages Nothing new Live Support User Guide'. Below that is a menu bar with 'Review', 'Datarama', 'Reports', 'References', 'Forms', 'Manage Levels', 'Users', 'Project', and 'Logout'. The main content area is titled 'Upload your file(s) here' and contains instructions: 'In order for us to know which reference the attachment belongs to, the filename must begin with the refid. If the original filename, begins with a number, you'll need an underscore, a space or some non-numeric separator e.g. if the refid is 37 myfile.pdf -> 37myfile.pdf 16candles.pdf -> 37 16candles.pdf (if you simply make it 3716candles.pdf, we'll attach it to refid 3716)'. It also says: 'After you've done that, simply click browse and select as many files as you like. If it's a new file for that refid, it will decrease the pending count. If the filename already exists for that reference (e.g. refid 37 has a file named 37\_candles.pdf and you upload "37\_candles.pdf"), it will simply update the attachment and pending will remain the same.' There is a 'BROWSE' button at the bottom.

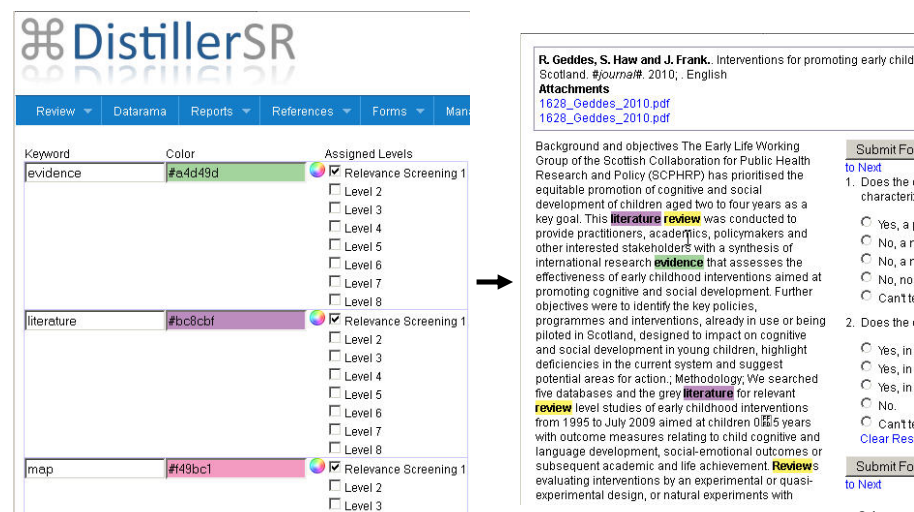
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# Highlighting keywords

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

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# Highlighting keywords



The screenshot shows the DistillerSR interface with a document viewer. The document text is: 'R. Geddes, S. Haw and J. Frank. Interventions for promoting early child Scotland. #journal#: 2010; English Attachments 1628\_Geddes\_2010.pdf 1628\_Geddes\_2010.pdf'. The text is highlighted in yellow. On the left, there's a 'Keyword' table with columns 'Keyword', 'Color', and 'Assigned Levels'. The table has three rows: 'evidence' with color '#a4d49d' and levels 'Relevance Screening 1', 'Level 2', 'Level 3', 'Level 4', 'Level 5', 'Level 6', 'Level 7', 'Level 8'; 'literature' with color '#bc8cbf' and levels 'Relevance Screening 1', 'Level 2', 'Level 3', 'Level 4', 'Level 5', 'Level 6', 'Level 7', 'Level 8'; and 'map' with color '#49bc1' and levels 'Relevance Screening 1', 'Level 2', 'Level 3'. An arrow points from the table to the document text. On the right, there's a 'Submit FO to Next' button and a 'Clear Res' button.

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## 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**

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## Editing references

The screenshot shows the DistillerSR web application interface. At the top, there is a navigation bar with the DistillerSR logo and a project dropdown menu set to 'Scoping\_ScS (Swi)'. Below the navigation bar is a search bar with fields for 'Search', 'Level' (set to 'Any Level'), 'Bibliofomat' (set to 'No Custom Format'), and 'Per Page' (set to '10'). A search button is located to the right of these fields. Below the search bar, a list of references is displayed. The first reference is selected, and an 'Editing Article' dialog box is open over it. The dialog box contains the following information: Refid: 1, Title: 'Proceedings of the 4th Workshop on Virtual Machines and Intermediate Languages, VMIL 2010, Held at the 1st ACM SIGPLAN Conference on Systems Applications: Software for Humanity', Author: 'Anonymous', Abstract: 'The proceedings contain 5 papers. The topics discussed include: Sal/Svm: an assembly language and virtual machine for computing with non-enumerated sets; optimizing the evaluation of patterns in pointcuts; towards performance measurements for the java virtual machine's invokedynamic; a systematic mapping study on...', Journal: 'Proc. Workshop Virtual Mach., Intermed. Lang., VMIL, Held at...', Language: 'English', and Year: '2011'. At the bottom of the dialog box are 'Save' and 'Cancel' buttons. An arrow points from the 'Edit Article' link in the reference list to the 'Editing Article' dialog box.

## 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**

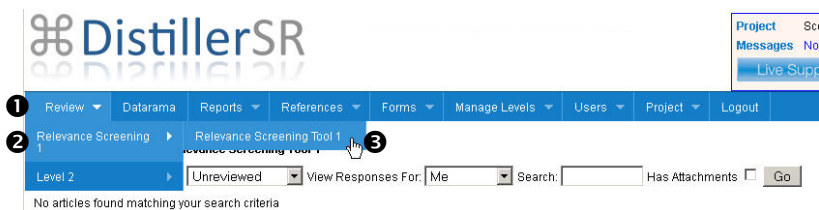
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The screenshot shows the DistillerSR web application interface, similar to the previous one. The search bar and reference list are visible. The first reference is selected, and a 'Quarantine Reference' dialog box is open over it. The dialog box contains the text: 'Please enter your reason for removing this article. Press cancel to abort the removal.' Below this text is a text input field. At the bottom of the dialog box are 'OK' and 'Cancel' buttons. An arrow points from the 'Quarantine Reference' link in the reference list to the dialog box. A circled '1' is placed above the 'References' menu item in the navigation bar, and a circled '5' is placed above the text input field in the dialog box.

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# 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)



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# View of a relevance screening form in DistillerSR

R. Geddes, S. Haw and J. Frank.. Interventions for promoting early child development for health: an environmental scan with special reference to Scotland. #journa# 2010, . English  
Attachments  
1628\_Geddes\_2010.pdf  
1628\_Geddes\_2010.pdf

Background and objectives The Early Life Working Group of the Scottish Collaboration for Public Health Research and Policy (SCPHRP) has prioritised the equitable promotion of cognitive and social development of children aged two to four years as a key goal. This **literature review** was conducted to provide practitioners, academics, policymakers and other interested stakeholders with a synthesis of international research **evidence** that assesses the effectiveness of early childhood interventions aimed at promoting cognitive and social development. Further objectives were to identify the key policies, programmes and interventions, already in use or being piloted in Scotland, designed to impact on cognitive and social development in young children, highlight deficiencies in the current system and suggest potential areas for action.;  
Methodology We searched five databases and the grey **literature** for relevant **review** level studies of early childhood interventions from 1995 to July 2009 aimed at children 0-5 years with outcome measures relating to child cognitive and language development, social-emotional outcomes or subsequent academic and life achievement. **Reviews** evaluating interventions by an experimental or quasi-experimental design, or natural experiments with control groups were included. We excluded studies of programmes specifically targeting minority groups in other countries, with little in common with minority groups in Scotland, and those targeting racial groups such as children with disabilities or

Submit Form and go to  
This Form - Next Reference or Skip to Next

1. Does the citation report the use of a scoping study methodology to identify and characterize the existing literature or evidence base on a broad topic?

Yes, a primary scoping study.  
 No, a methodological review of scoping studies.  
 No, a narrative review of scoping studies.  
 No, none of the above.  
 Can't tell

2. Does the citation describe research in English, French or Spanish?

Yes, in English.  
 Yes, in French.  
 Yes, in Spanish.  
 No.  
 Can't tell.  
[Clear Response](#)

Submit Form and go to  
This Form - Next Reference or Skip to Next

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# How to change your responses after submission

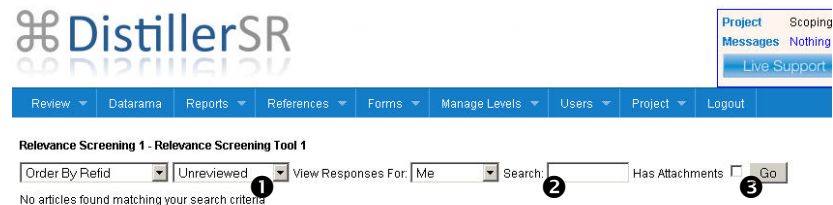
One way is to essentially repeat the steps you would take to submit a response for the first time:

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.

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# 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).

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## To view article status

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



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## To view article status

	Unreviewed	Some Reviews	Included	Excluded	Conflict	Fully Reviewed
Relevance Screening 1 - Relevance Screening Tool 1	0	0	205	1363	0	1568
Level 2 - Data Characterization and Utility	108	15	73	9	0	82

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.

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## To view user workload/progress

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



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## Why run a query?

Run a query to:

- View conflicts
- View user responses
- Filter articles by responses
- And more...

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## Running a query to view conflicts between reviewers

The screenshot shows the DistillerSR web application interface. At the top, there is a navigation bar with the following items: Review, Datarama, Reports, References, Forms, Manage Levels, Users, Project, and Logout. Below the navigation bar, there are several tabs: Report Settings, Advanced Options, Reference Criteria, Data Criteria, Reference Display Options, Saved Queries, and Query History. The 'Report Settings' tab is selected, and it contains several sections. The 'Basic Options' section includes: Report Format (View Online), Disagreements (Show all data), Bibliographic Format (No Custom Format), and Filter Articles by Responses (Add to query). The 'Data to Display' section shows a list of levels from 1 to 8, with 'Relevance Screening 1' selected. At the bottom, there is a 'Run Report' button and a text box for 'and save as'.

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## 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)

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## 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**

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## Running a query to view conflicts between reviewers

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## 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**

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## View conflicts between reviewers

Found 29 articles with 59 sets of data in 0.556 seconds.

First Previous 1 2 3 4 5 Next Last

Refid	Bibliograph	User	Level	Does the citation report th...	Does the citation describe ...
220	S. Bruno, C. de Waure, M. L. Specchia, L. Manzoli, G. Liguori, R. Siliquini, W. Ricciardi and Network Italiano Hia. Health impact assessment methods and practice: state of the art and necessary developments. <i>Ig Sanita Pubbl.</i> 2010. ita	ian young	1		
220	S. Bruno, C. de Waure, M. L. Specchia, L. Manzoli, G. Liguori, R. Siliquini, W. Ricciardi and Network Italiano Hia. Health impact assessment methods and practice: state of the art and necessary developments. <i>Ig Sanita Pubbl.</i> 2010. ita	Mai Pham	1		No.
504	R. Franco, R. G. Amaral, E. B. L. Montemor, D. M. Montis, S. S. Morais and L. C. Zeferino. Factors associated with false-negative cervical cytopathological results. <i>Rev.Bras Ginecol Obstet.</i> 2006. Portuguese	Mai Pham	1		
504	R. Franco, R. G. Amaral, E. B. L. Montemor, D. M. Montis, S. S. Morais and L. C. Zeferino. Factors associated with false-negative cervical cytopathological results. <i>Rev.Bras Ginecol Obstet.</i> 2006. Portuguese	judy_Greig	1		No.
507	C. Frensdal. Singletons and neutrinos. <i>Lett.Math.Phys.</i> 2000. English	Mai Pham	1	No, none of the above.	
507	C. Frensdal. Singletons and neutrinos. <i>Lett.Math.Phys.</i> 2000. English	judy_Greig	1	No, a narrative review of scoping studies.	
516	J. C. P. Gabriel. 2d Random networks of carbon nanotubes. <i>C.R.Phys.</i> 2010. French	Mai Pham	1	No, none of the above.	
516	J. C. P. Gabriel. 2d Random networks of carbon nanotubes. <i>C.R.Phys.</i> 2010. French	judy_Greig	1	No, a narrative review of scoping studies.	
517	G. Gaddoni, F. Resta, M. Selvi, L. Baldassari and F. Pasi. Aids associated with acquired ichthiosis. <i>SPEC. OGGI DERMATOL.</i> 1993. Italian	Mai Pham	1	No, none of the above.	
517	G. Gaddoni, F. Resta, M. Selvi, L. Baldassari and F. Pasi. Aids associated with acquired ichthiosis. <i>SPEC. OGGI DERMATOL.</i> 1993. Italian	judy_Greig	1	No, a narrative review of scoping studies.	No.

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## Example: Changing a response after conflict resolution

507	C. Frensdal. Singletons and neutrinos. <i>Lett.Math.Phys.</i> 2000. English	Mai Pham	1	No, none of the above. 1
507	C. Frensdal. Singletons and neutrinos. <i>Lett.Math.Phys.</i> 2000. English	judy_Greig	1	No, a narrative review of scoping studies.

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**.

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## Final notes

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- 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

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## Links

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- Website URL: <http://systematic-review.net/>
- Login URL: <https://systematic-review.ca/Login/Login.php>

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