INSTITUTE OF EDUCATION

EPPI-Reviewer Web Demonstration

Online Introductory Workshop
4 September 2020

Dr Melissa Bond

EPPI-Reviewer Support Officer

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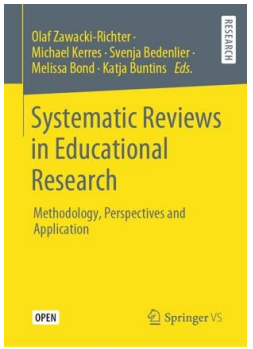
@misc_nerd @EPPIReviewer

Presenter Background

Dr Melissa Bond

- Former high school teacher in SA (10 years)
- Research Associate (3 years, Uni Oldenburg)
- Defended PhD in July
- EPPI-Reviewer Support Officer (since Feb 2020)
- Systematic reviews
  - Artificial Intelligence in Higher Education
  - Student engagement and educational technology in higher education
  - Student engagement and the flipped learning approach (K-12)
  - Community of Inquiry framework
  - Scoping review – EPPI-Reviewer
  - COVID-19 studies in higher education
  - Editor of the open access book Systematic Reviews in Educational Research



EPPI-Reviewer: What is it *for*?

EPPI-Reviewer was created to support the methodological work conducted at the EPPI-Centre.

- Web-based - accessed from any device with an internet connection.
- Developed for all types of systematic review.
- Designed for flexibility.

EPPI-Reviewer helps by:

- keeping your review process explicit and replicable
- enabling you to work with many others in one review
- keeping your data in one place
- allowing updates to your review
- allowing the easy creation of interactive evidence gap maps

Webinar Topics

- ER admin and accessing help.
- Logging in and basic navigation of ER Web.
- Importing references.
- Managing duplicates.
- Adding and editing coding tools/codes.
- Creating coding assignments.
- Line-by-line PDF coding.
- Generating reports.
- Interactive Evidence Gap Maps
- Any other questions?

Webinar Topics

- [x] ER admin and accessing help.
- [ ] Logging in and basic navigation of ER Web.
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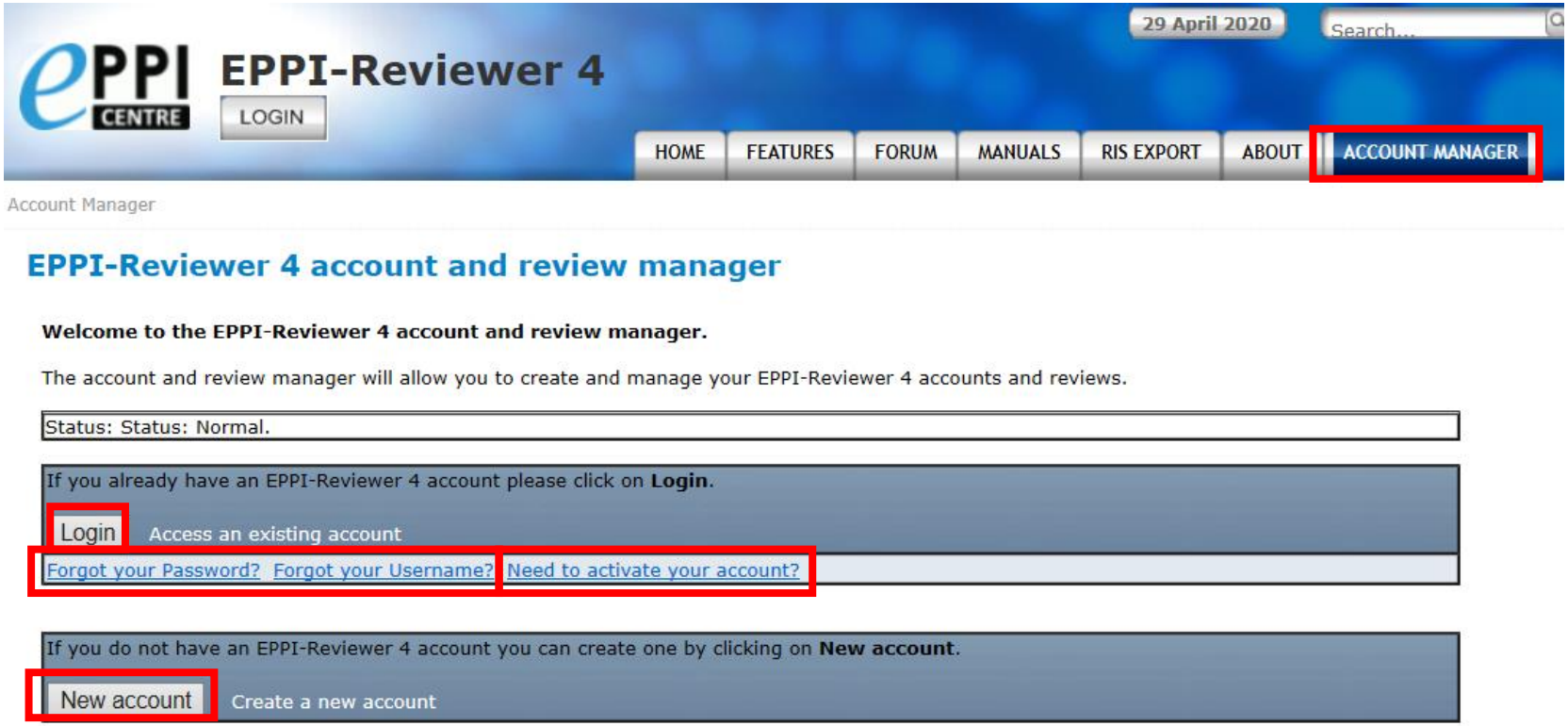
- [ ] Interactive Evidence Gap Maps
- [ ] Any other questions?

EPPI-Reviewer Gateway

https://eppi.ioe.ac.uk/cms/er4

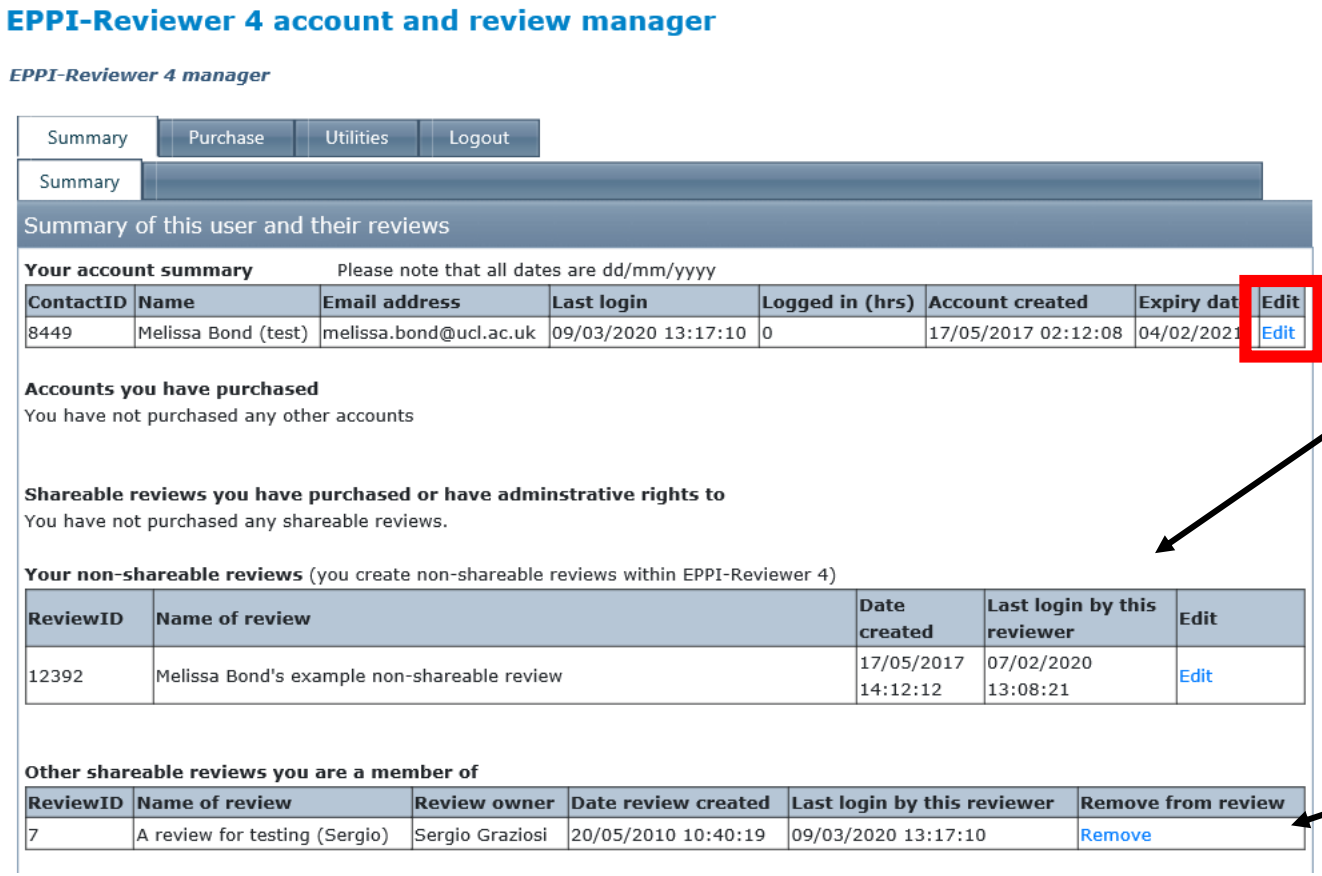
- Access latest information about ER and features
- Support forums
- User manual, FAQ
- Instructional videos
- Export to RIS facility
- Access to the ER review and account manager

ER Account and Review Manager



- Login using your EPPI-Reviewer username and password.
- Forgotten password and username facility.
- Create a new account.
- Activate your account.

ER Account and Review Manager



EPPI-Reviewer 4 account and review manager

EPPI-Reviewer 4 manager

Summary | Purchase | Utilities | Logout

Summary

Summary of this user and their reviews

Your account summary Please note that all dates are dd/mm/yyyy

ContactID	Name	Email address	Last login	Logged in (hrs)	Account created	Expiry dat	Edit
8449	Melissa Bond (test)	melissa.bond@ucl.ac.uk	09/03/2020 13:17:10	0	17/05/2017 02:12:08	04/02/2021	Edit

Accounts you have purchased

You have not purchased any other accounts

Shareable reviews you have purchased or have adminstrative rights to

You have not purchased any shareable reviews.

Your non-shareable reviews (you create non-shareable reviews within EPPI-Reviewer 4)

ReviewID	Name of review	Date created	Last login by this reviewer	Edit
12392	Melissa Bond's example non-shareable review	17/05/2017 14:12:12	07/02/2020 13:08:21	Edit

Other shareable reviews you are a member of

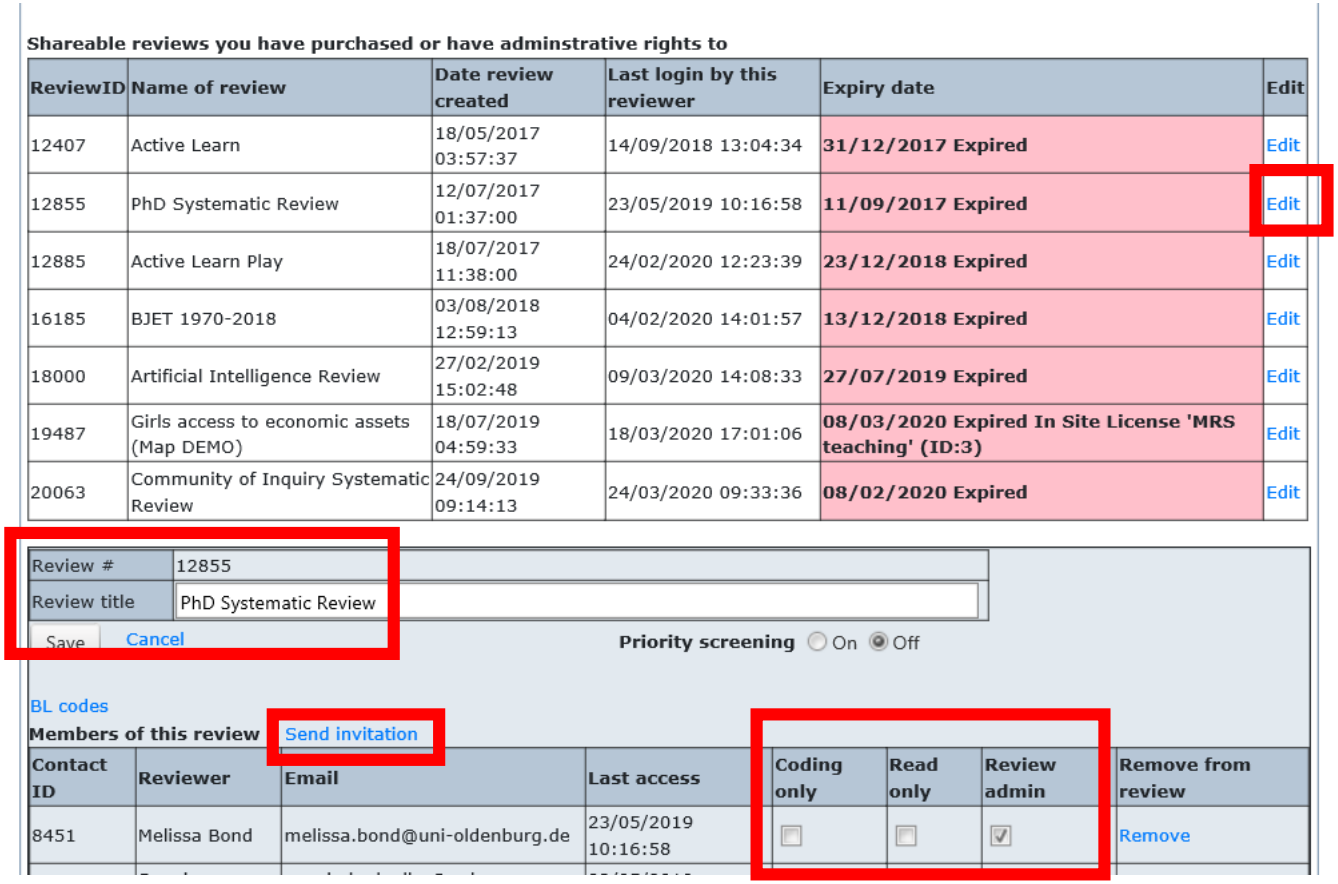
ReviewID	Name of review	Review owner	Date review created	Last login by this reviewer	Remove from review
7	A review for testing (Sergio)	Sergio Graziosi	20/05/2010 10:40:19	09/03/2020 13:17:10	Remove

Once logged in, you can:

- See and edit your account details.
- See and edit your private (non-shareable reviews).
- See which other reviews you are a member of.

YouTube video: https://youtu.be/1UaZoHrqKZ8

ER Account and Review Manager



Shareable reviews you have purchased or have adminstrative rights to

ReviewID	Name of review	Date review created	Last login by this reviewer	Expiry date	Edit
12407	Active Learn	18/05/2017 03:57:37	14/09/2018 13:04:34	**31/12/2017 Expired**	Edit
12855	PhD Systematic Review	12/07/2017 01:37:00	23/05/2019 10:16:58	**11/09/2017 Expired**	Edit
12885	Active Learn Play	18/07/2017 11:38:00	24/02/2020 12:23:39	**23/12/2018 Expired**	Edit
16185	BJET 1970-2018	03/08/2018 12:59:13	04/02/2020 14:01:57	**13/12/2018 Expired**	Edit
18000	Artificial Intelligence Review	27/02/2019 15:02:48	09/03/2020 14:08:33	**27/07/2019 Expired**	Edit
19487	Girls access to economic assets (Map DEMO)	18/07/2019 04:59:33	18/03/2020 17:01:06	**08/03/2020 Expired In Site License 'MRS teaching' (ID:3)**	Edit
20063	Community of Inquiry Systematic Review	24/09/2019 09:14:13	24/03/2020 09:33:36	**08/02/2020 Expired**	Edit

Review # 12855

Review title PhD Systematic Review

Save Cancel

Priority screening On Off

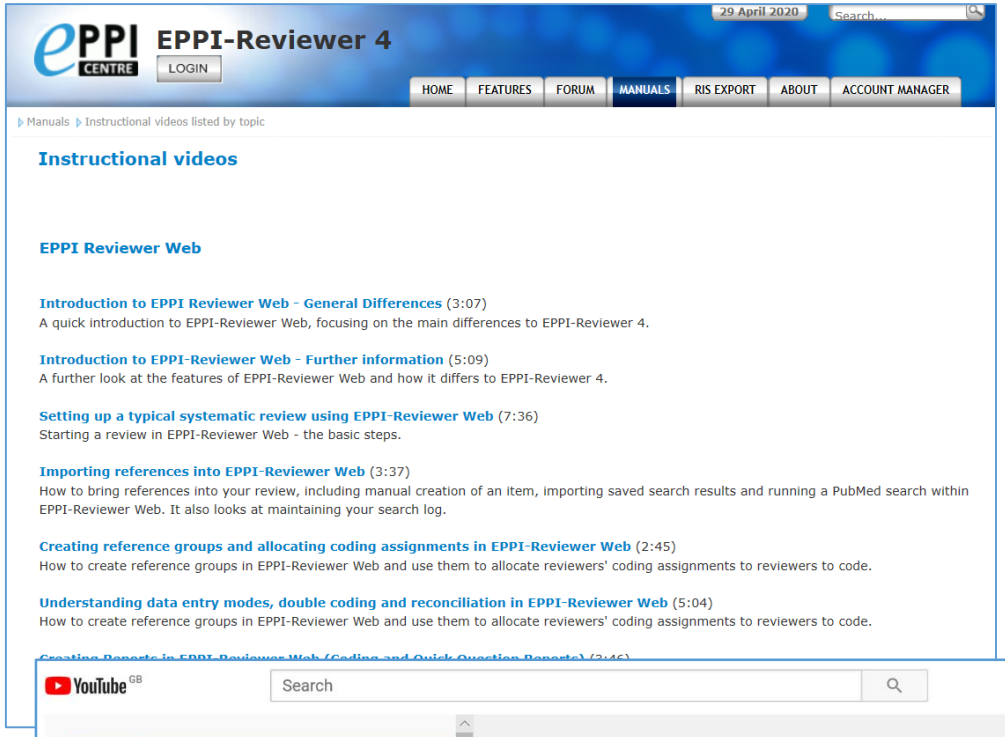
BL codes

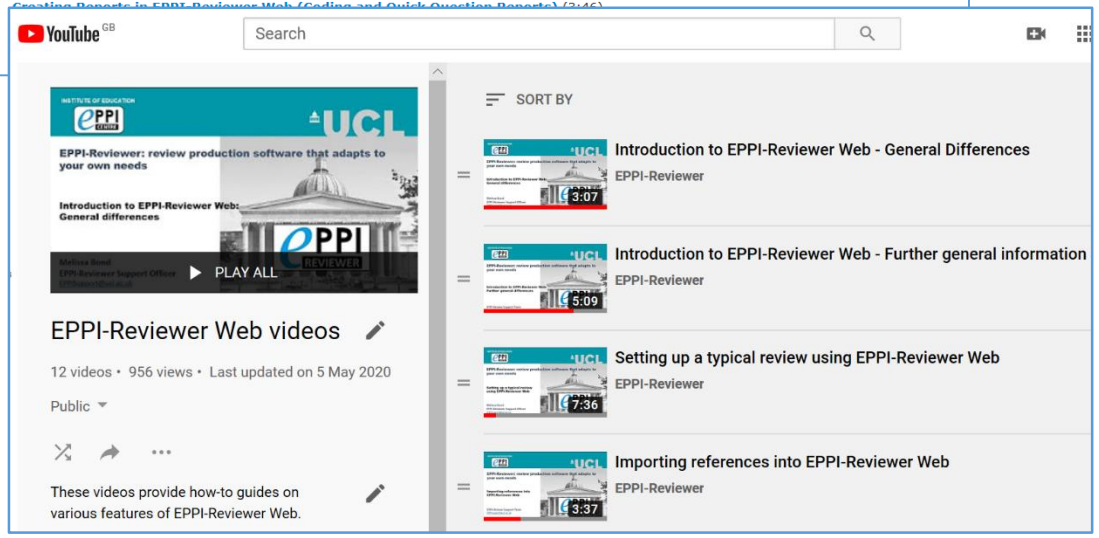
Members of this review Send invitation

Contact ID	Reviewer	Email	Last access	Coding only	Read only	Review admin	Remove from review
8451	Melissa Bond	melissa.bond@uni-oldenburg.de	23/05/2019 10:16:58	☐	☐	☑	Remove

- Edit your review's name.
- Invite others into your shareable review.
- Set roles for other users (if permissions allow)

EPPI-Reviewer Instructional Videos

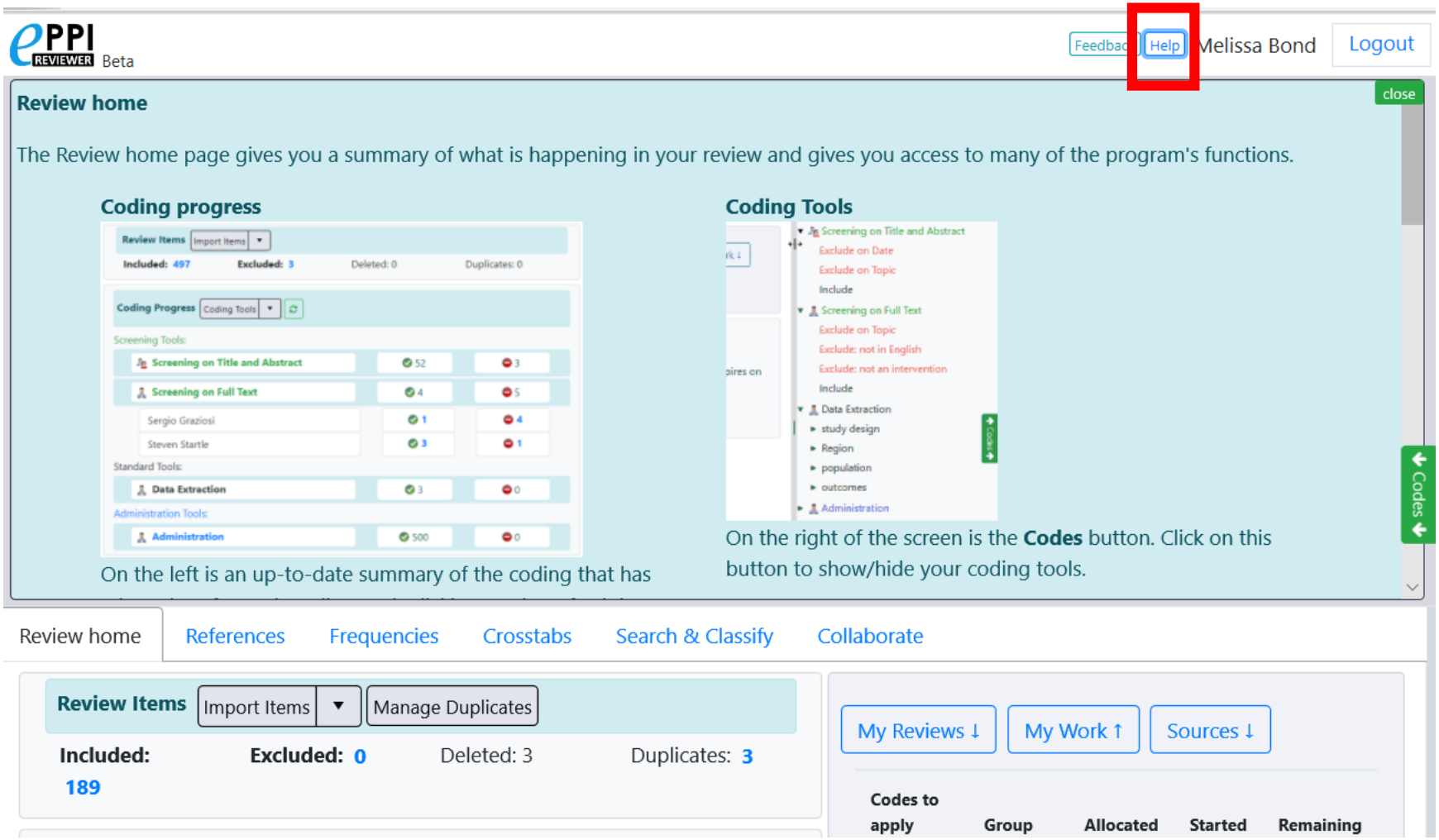




- Accessed through EPPI-Reviewer gateway or our YouTube channel.
- Video playlists available for General, ER4 and ER Web.
- Variety of ER Web topics, including:
  - Importing references
  - Editing coding tools
  - Screening/coding
  - Running reports
  - Interactive EGM

EPPI-Reviewer Web – Home Screen

- Click on the blue Help button to view contextual help.



Feedback button is not for support requests – please email EPPISupport@ucl.ac.uk

Webinar Topics

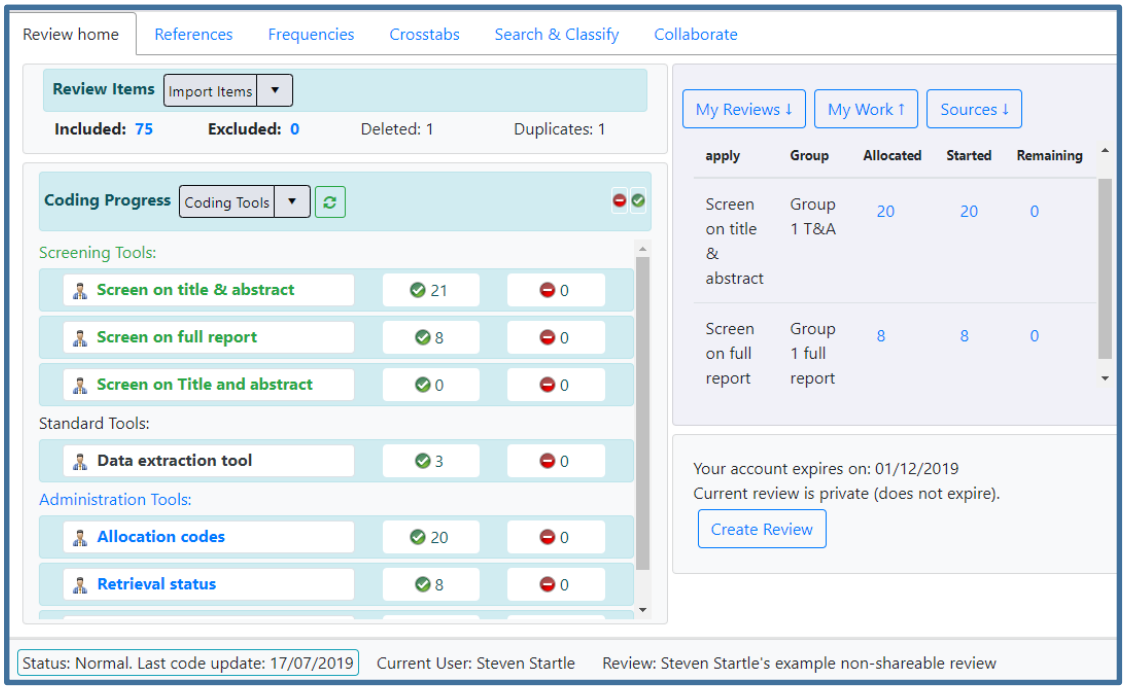
- ER admin and accessing help.
- Logging in and basic navigation of ER Web.
- Importing references.
- Managing duplicates.
- Adding and editing coding tools/codes.
- Creating coding assignments.
- Line-by-line PDF coding.
- Generating reports.
- Interactive Evidence Gap Maps
- Any other questions?

Setting up a typical review in ER Web video: https://youtu.be/UV3AIXQy1JI

EPPI-Reviewer Web

https://eppi.ioe.ac.uk/eppireviewer-web

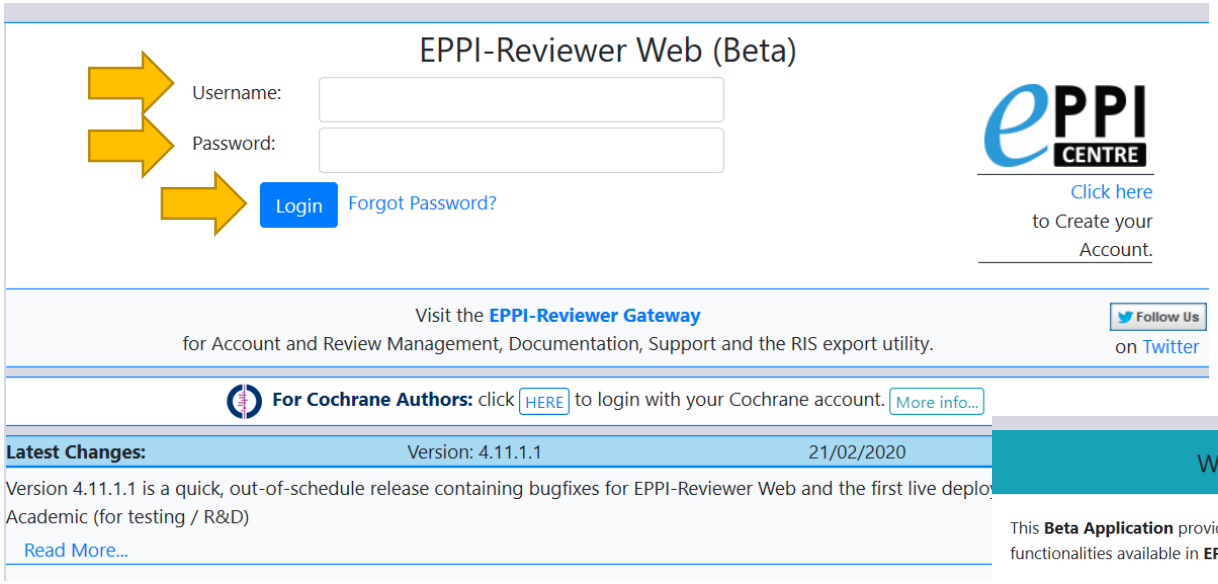
- Works with modern browsers (Firefox, Safari, Chrome).
- Works on web-enabled devices, e.g. smartphones and tablets.
- Uses the same data as EPPI-Reviewer 4.



- Based on same tech as Google Docs and Gmail.
- It is **still in development** – new functionalities appear regularly (roughly every 1-2 months).

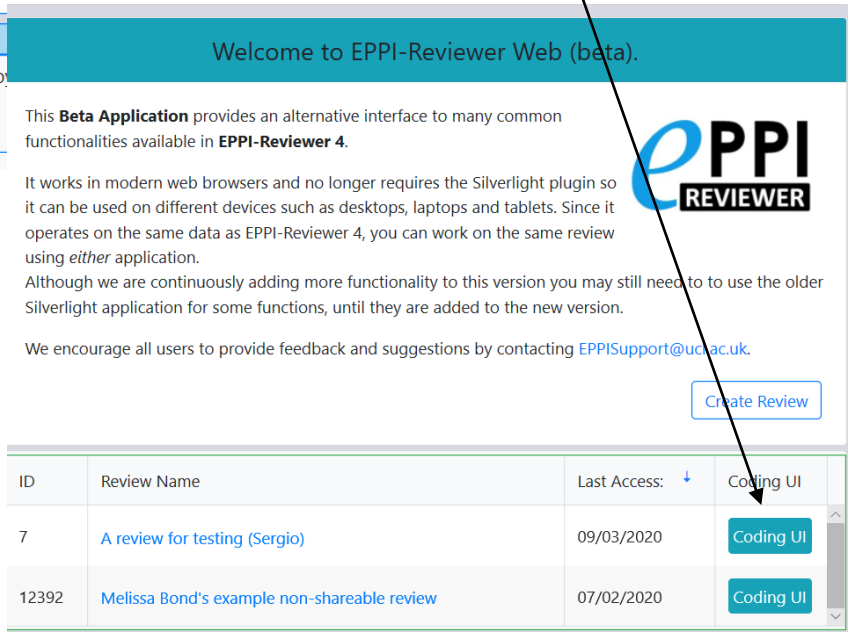
Logging into EPPI-Reviewer Web

https://eppi.ioe.ac.uk/eppireviewer-web



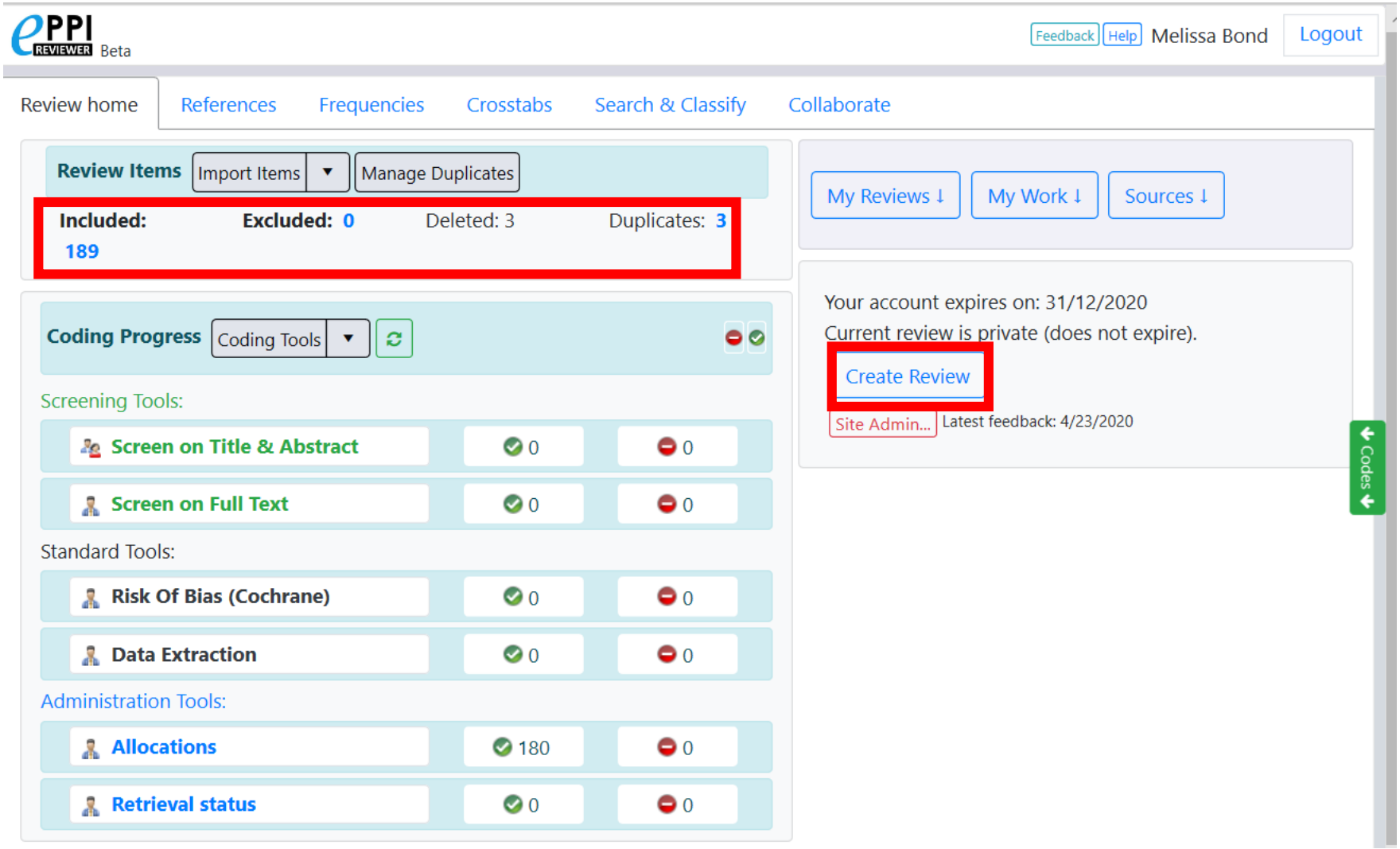
HELPFUL TIP:

If the review name you want to access is greyed out, you have Coding Only access and need to click the 'Coding UI' button.



1. Enter your username.
2. Enter your password.
3. Click on 'Login'.
4. Select review by clicking on review name or 'Coding UI'.

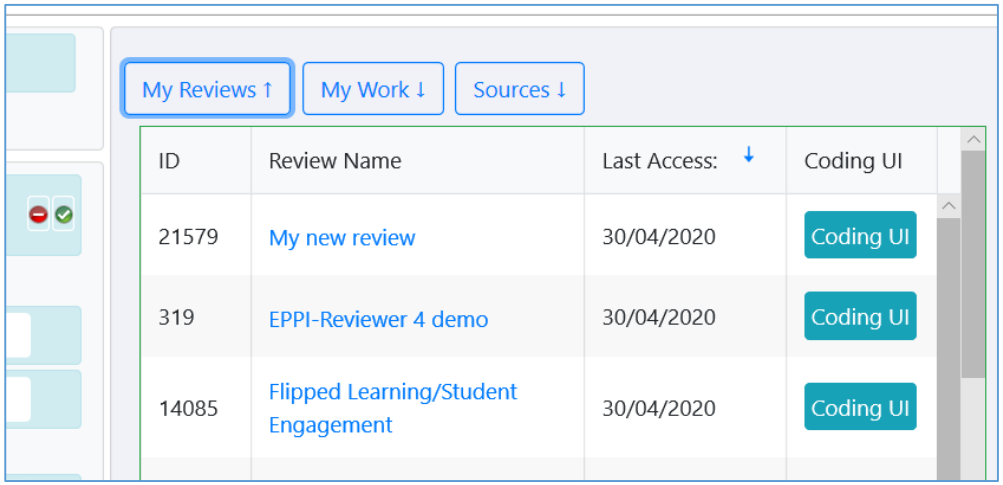
EPPI-Reviewer Web – Home Screen



- Quick overview of included, excluded, deleted and duplicate items.
- Can also create a new review from here.

EPPI-Reviewer Web – Home Screen

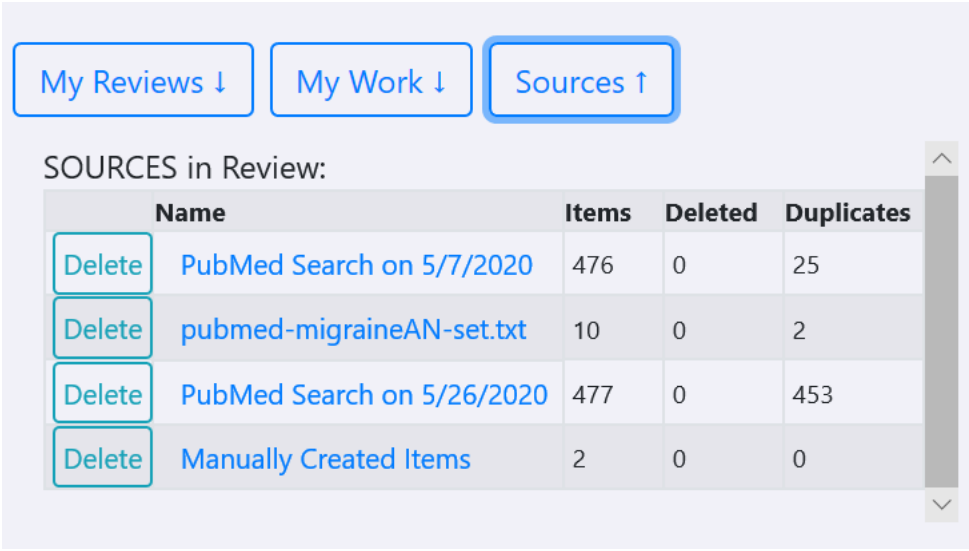
My Reviews panel



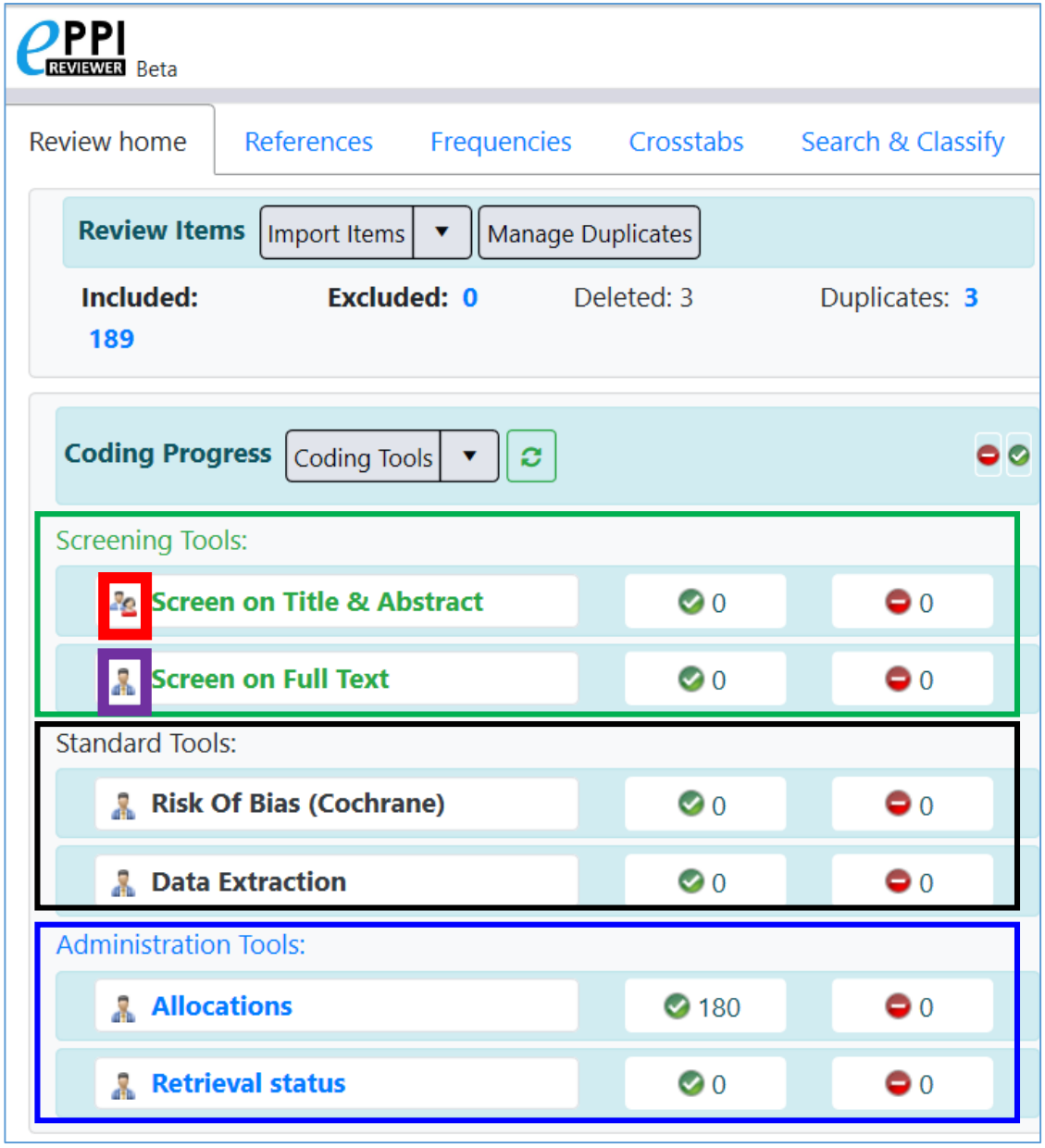
- Lists the reviews you have access to.
- ➢ Click on a review name to switch to that review.
- ➢ Click on 'Coding UI' to go to a coding only view.

Sources panel

- Lists all imports, including imported files, PubMed searches within ER and manually created items.
- Items imported in one file can be deleted here if necessary.



EPPI-Reviewer Web – Home Screen



- Coding Progress panel shows the coding tools within the review.

Screening tools

- Include/Exclude only
- One level of hierarchy
- Normal or comparison mode

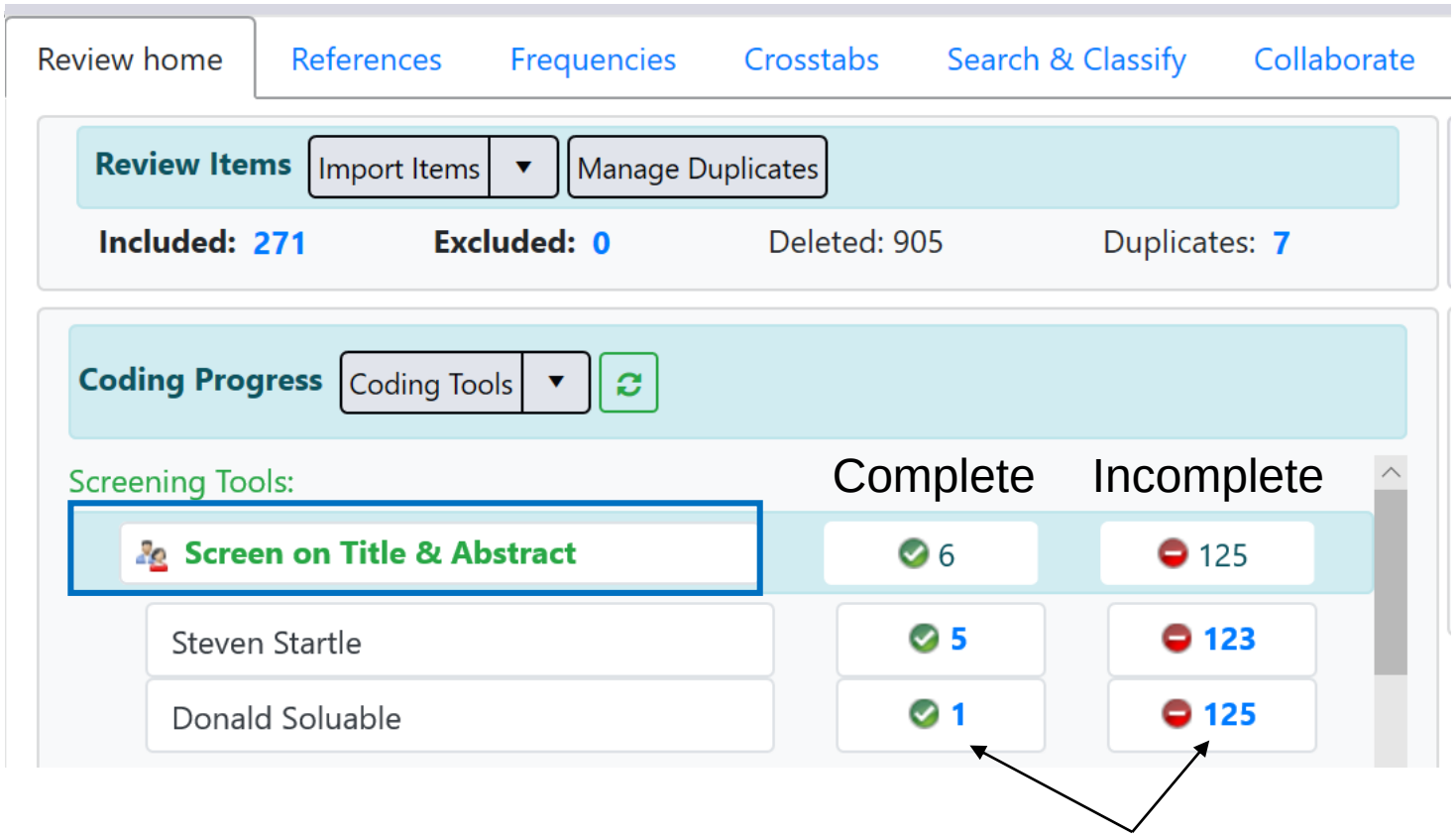
Standard tools

- Multiple code types
- Multiple levels
- Normal or comparison mode

Administration tools

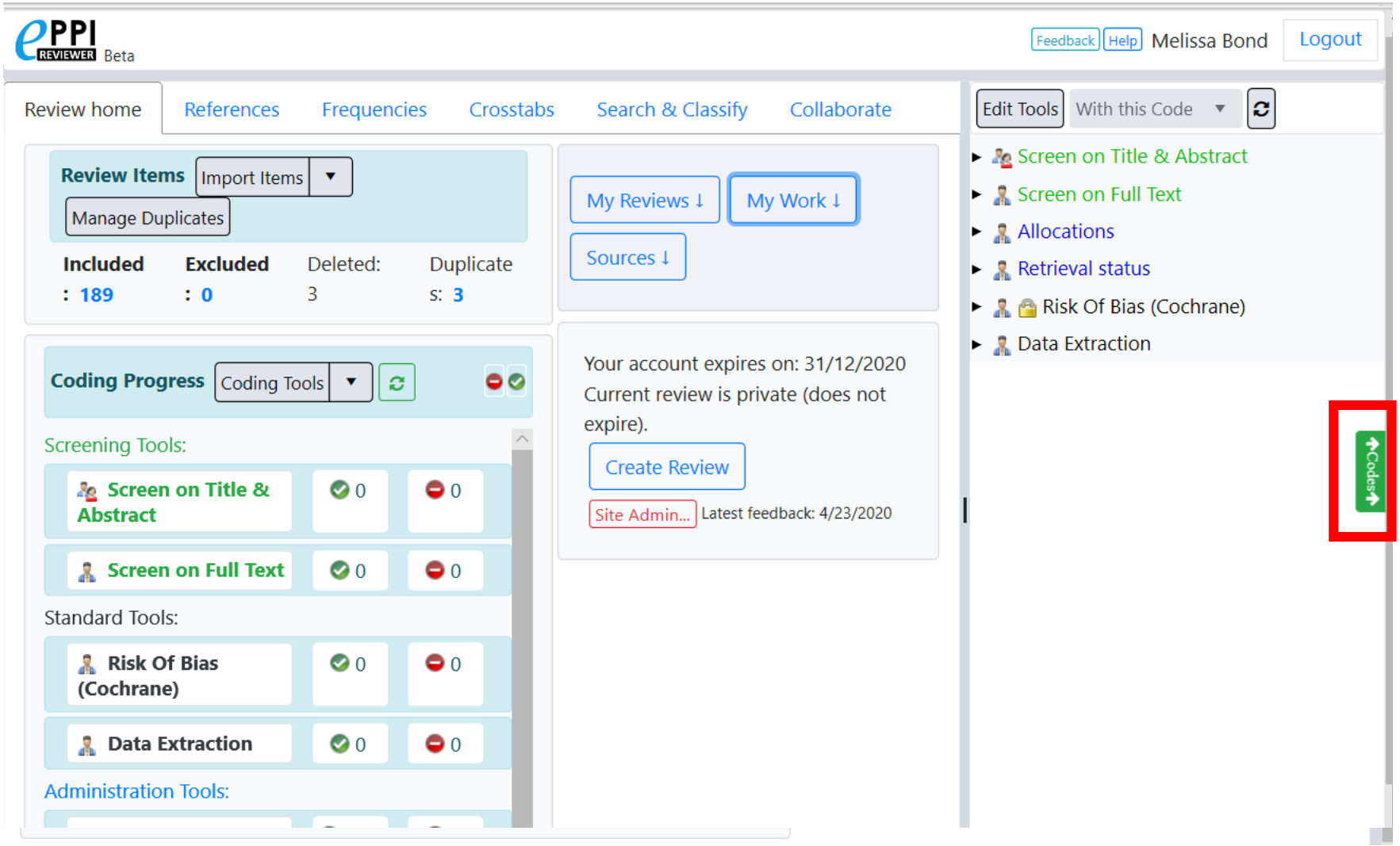
- Selectable/non-selectable
- Multiple levels
- Normal data entry mode only

EPPI-Reviewer Web – Home Screen



- Clicking on the name of a coding tool will show the coding progress.
- By clicking on a blue number, you will be taken to a list of those items in the References tab.

EPPI-Reviewer Web – Home Screen



- Click on the green ‘Codes‘ button to open and close the coding tools

Webinar Topics

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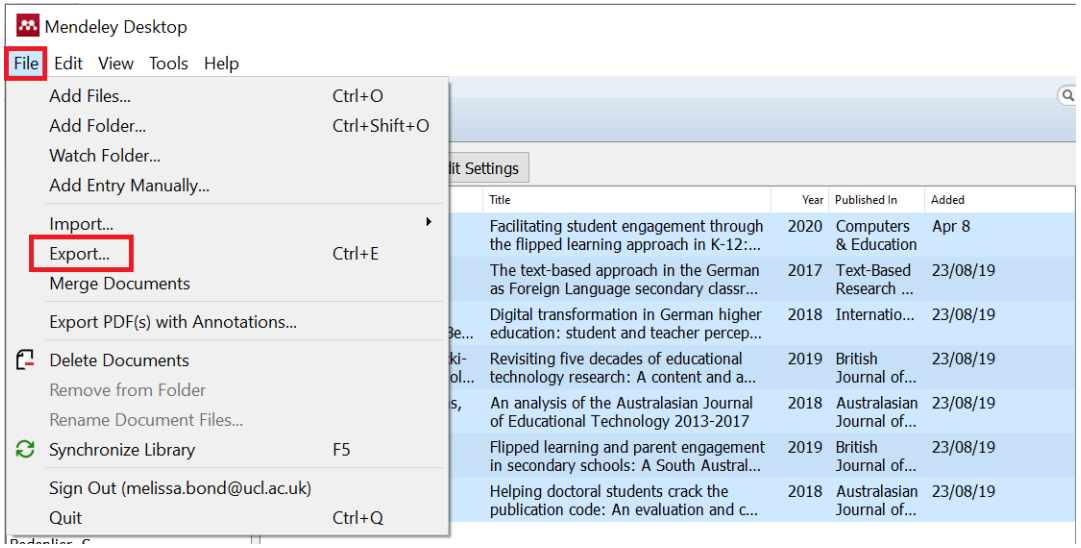
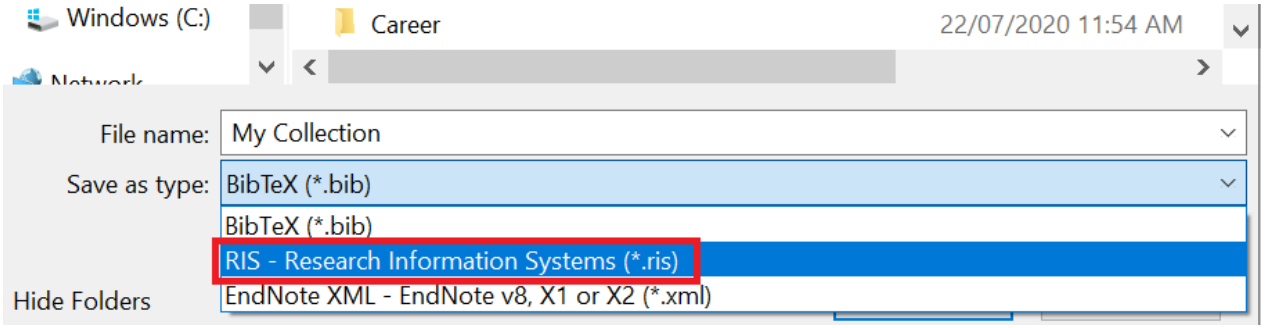
YouTube: https://youtu.be/Emkuq5H_FB0

Exporting references from Mendeley

1. Select the documents that you want to export from Mendeley.
2. Click on **File** and then **Export.**



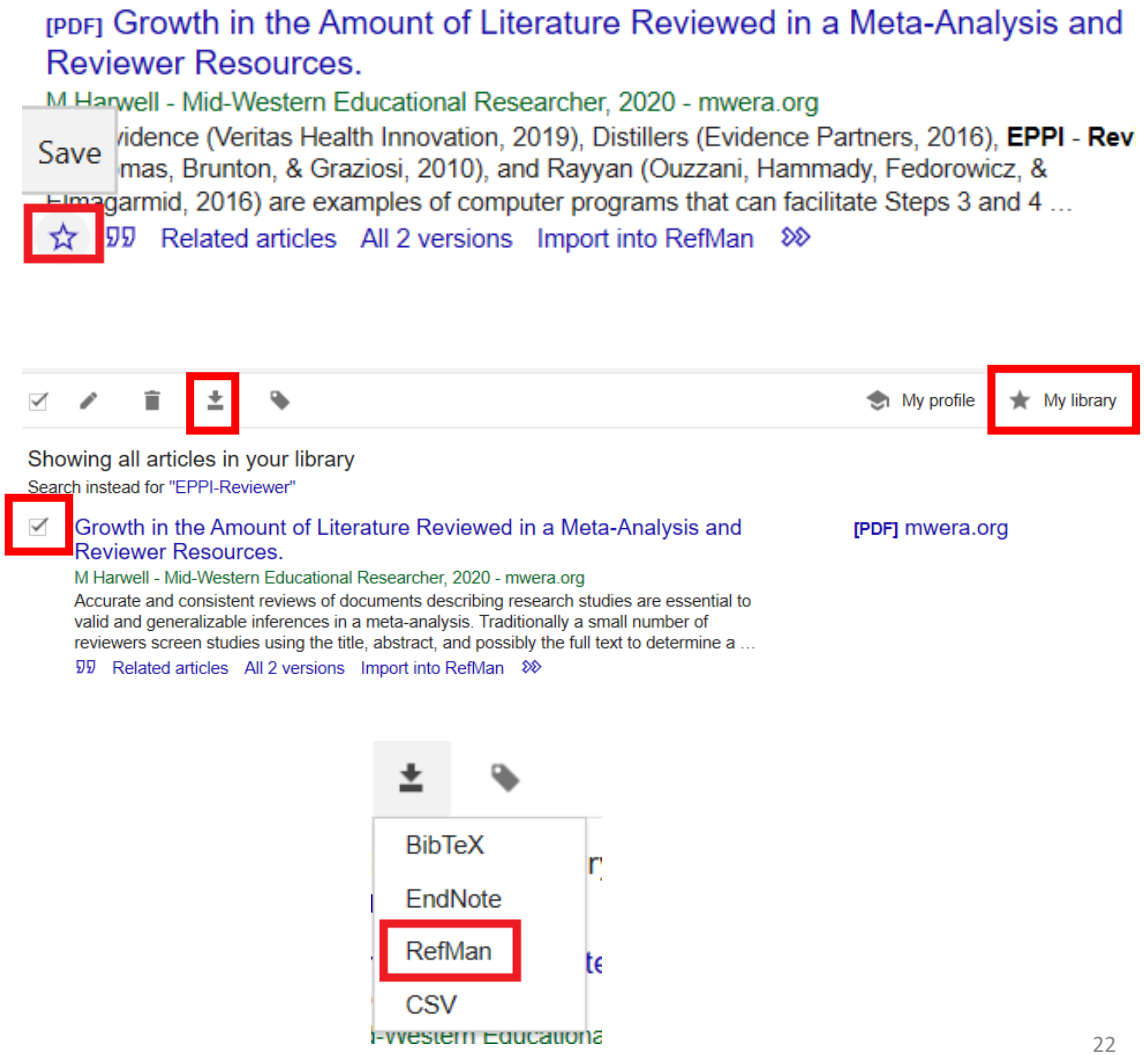


3. Type in a file name and **change the file type to RIS**.

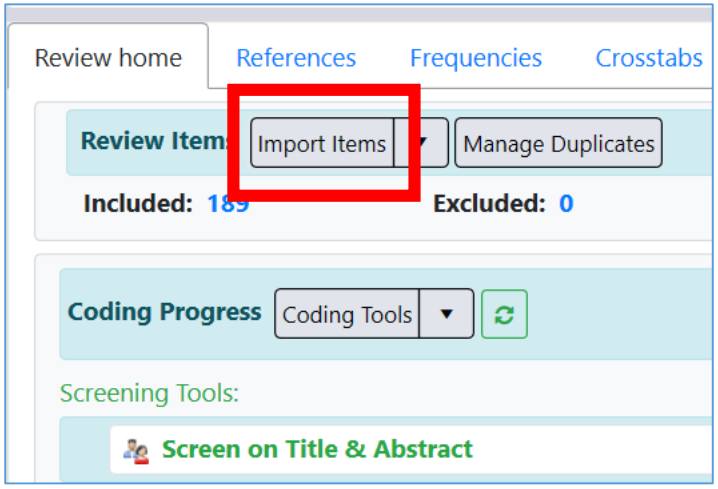
4. Save to your device.

Exporting references from Google Scholar

1. Ensure that you are logged into Google Scholar.
2. Conduct your search.
3. Click on the star at the bottom of an item to save it into your ‘My Library’.
4. Once you have saved the items to export, click on My Library at the top right.
5. Select the items you want to export from the list.
6. Click on the export button.
7. Choose RefMan.
8. Save to your device.

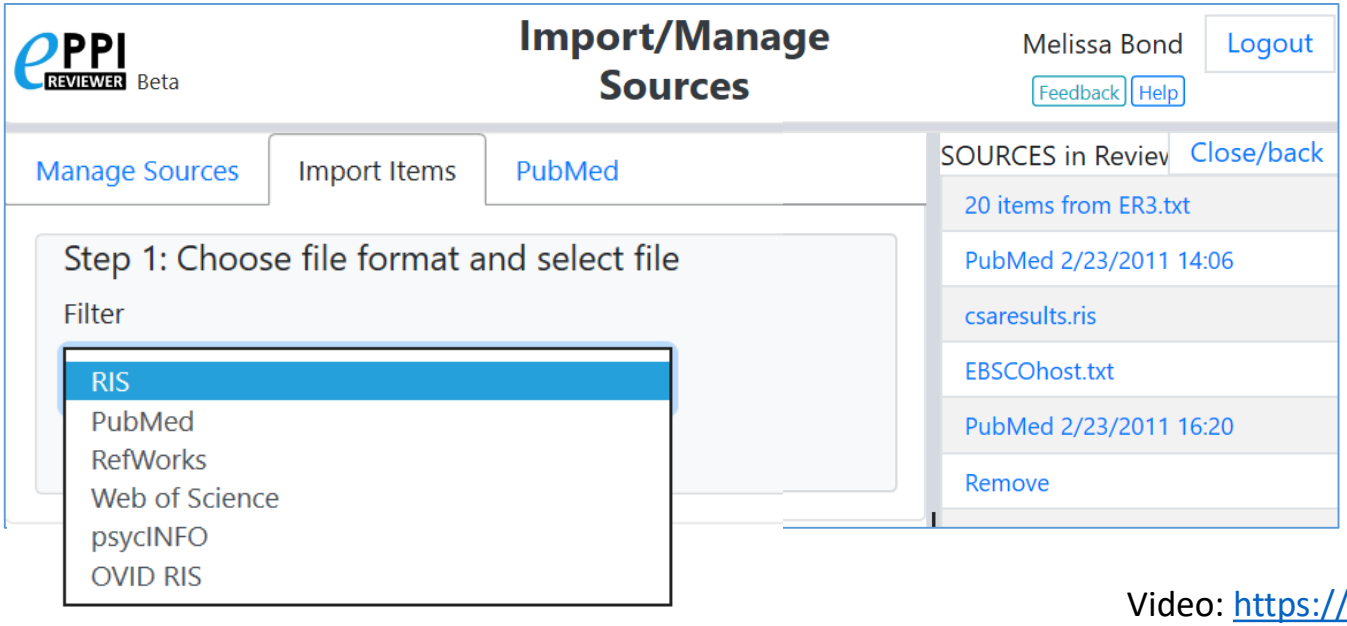


Importing references



Review home tab

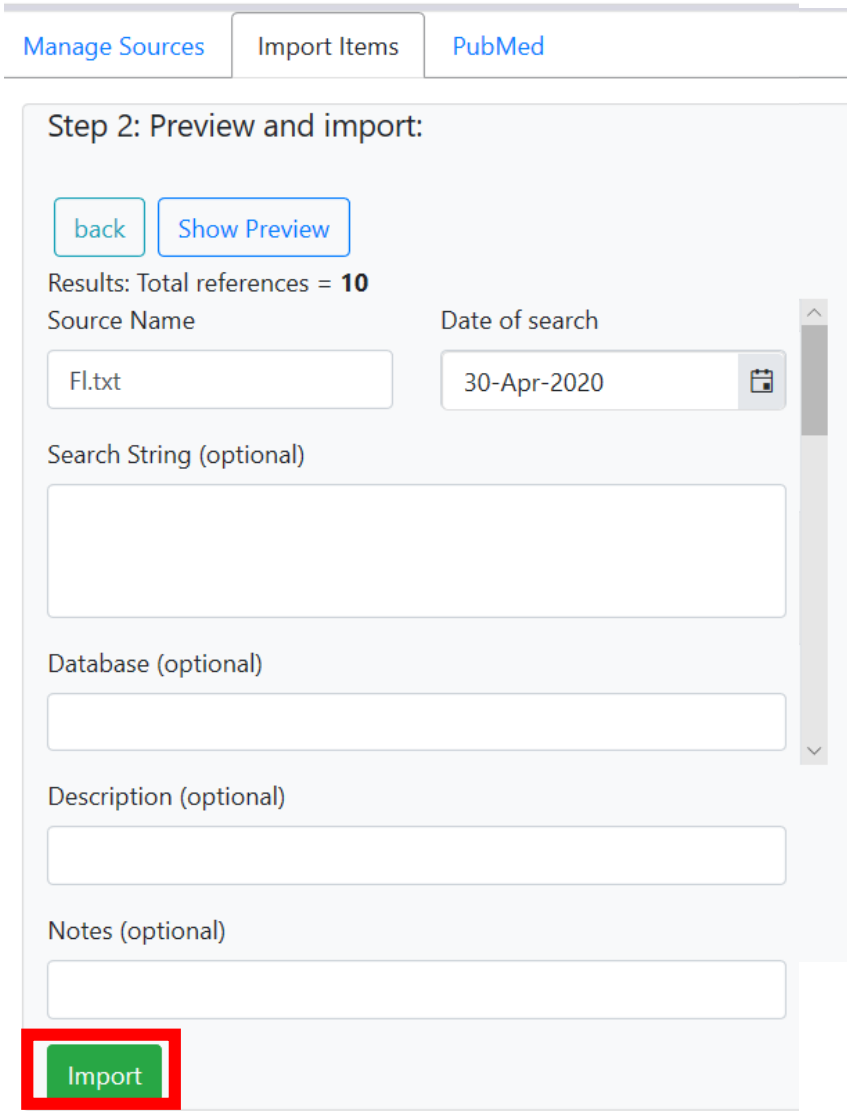
- Click on the **Import items** button
- The Import/Manage Sources page will be displayed.



- Select an import filter.
  - RIS for Mendeley & Google Scholar
- Find your file and click open.

Video: https://youtu.be/Emkuq5H_FB0

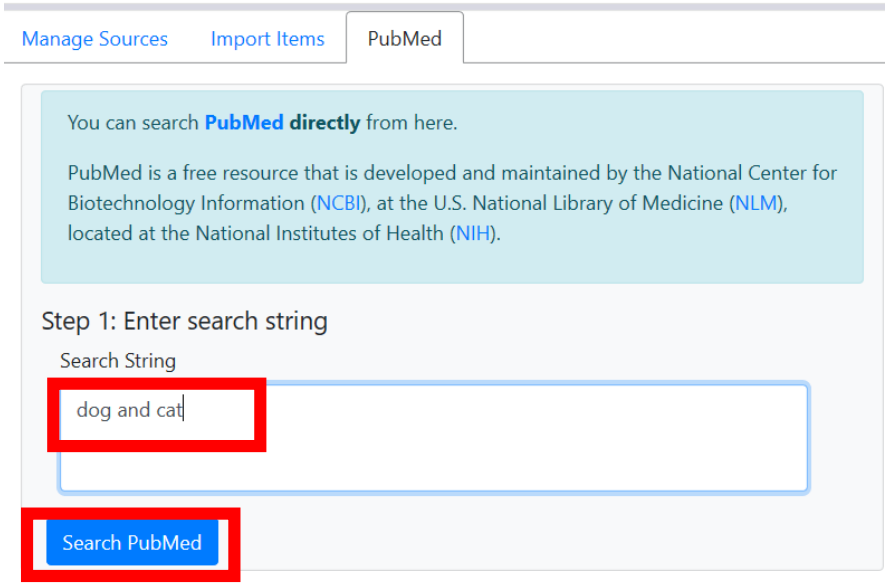
Importing references

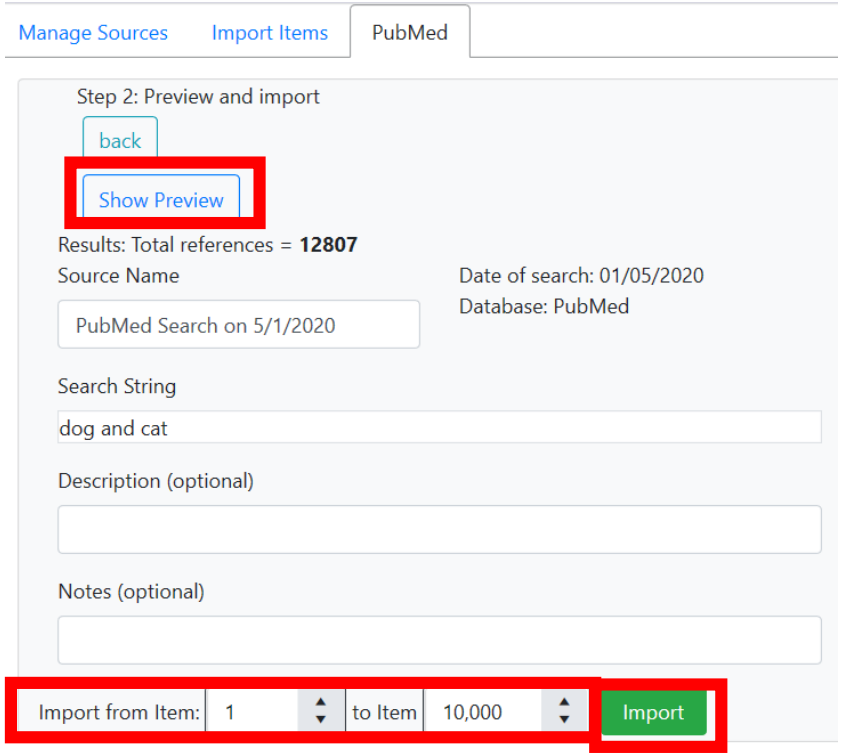


- Number of items to import will be displayed.
- Enter search details if desired, including string, database and date of the search.
- Click on the **Show Preview** button to see items for importing.
- Check to see if they appear as you would expect.
- Click **Hide Preview** to collapse.
- Click on **Import** to bring the items into your review.

Video: https://youtu.be/Emkuq5H_FB0

Importing references from PubMed

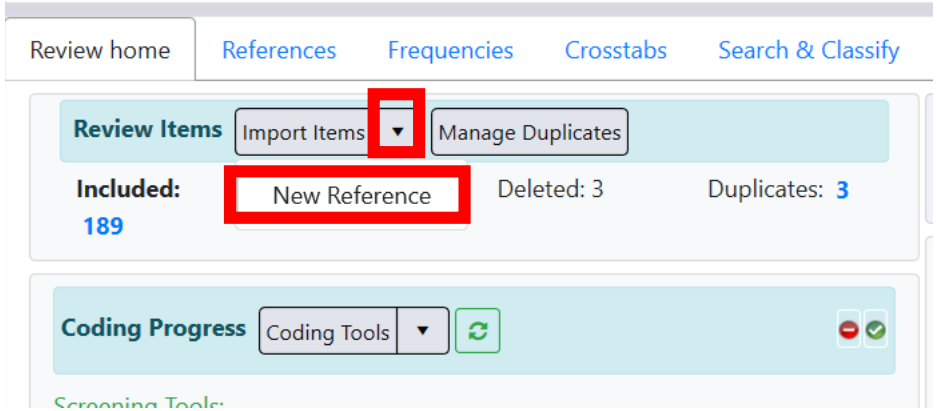




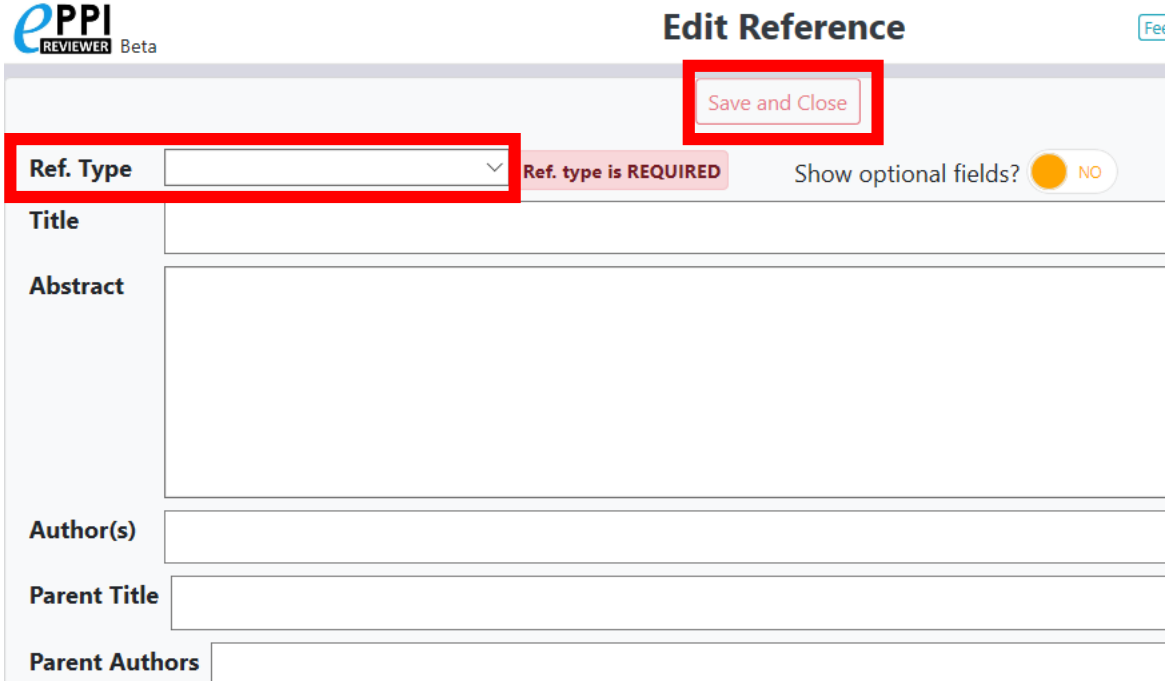
- Click on **PubMed** tab.
- Type in your search terms.
- Click **Search PubMed** and the items will be listed.
- Preview items and set the number to import (not too many!)
- Click **Import** to bring the items into your review.

Video: https://youtu.be/Emkuq5H_FB0

Manually creating an item

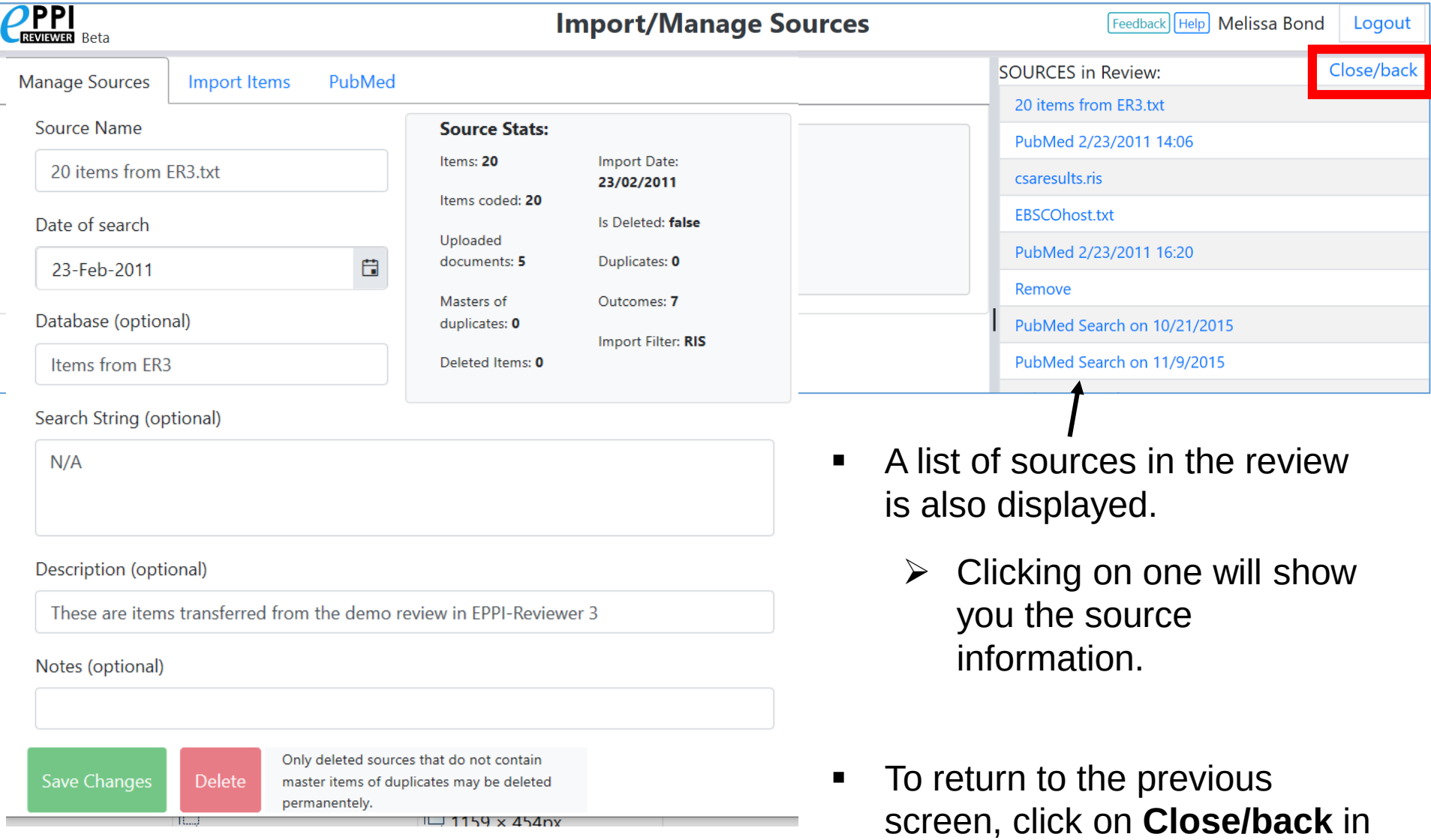


- Review home tab.
- Click on the **black arrow** next to Import Items.
- Click on **New Reference**.



- Enter the citation details in the Edit Reference window.
- Be sure to select the correct reference type (e.g. journal article).
- When finished, click **Save and Close**.

Importing references



- A list of sources in the review is also displayed.
  - ➢ Clicking on one will show you the source information.

- To return to the previous screen, click on **Close/back** in the top right-hand corner.

Video: https://youtu.be/Emkuq5H_FB0

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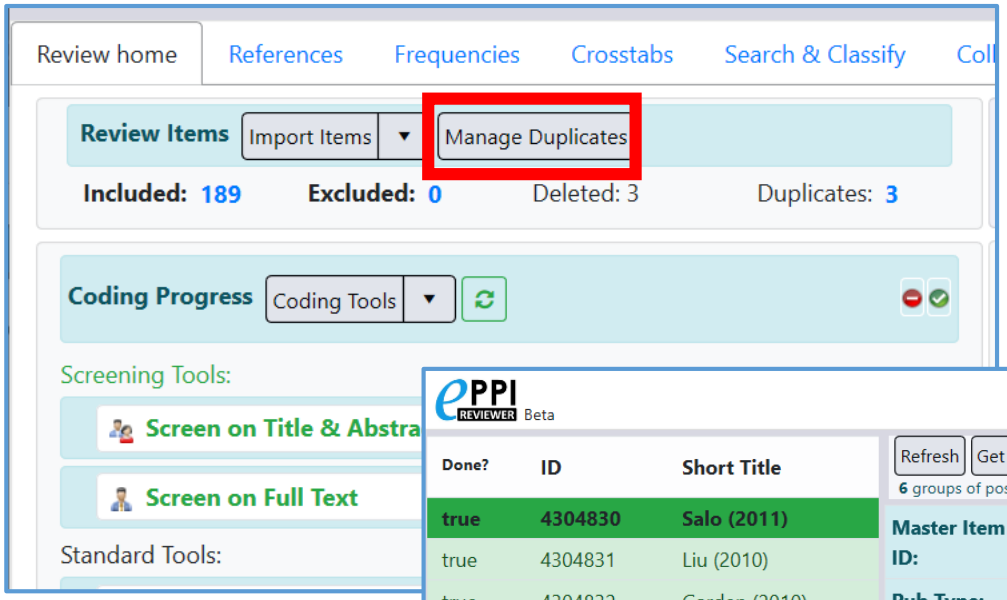
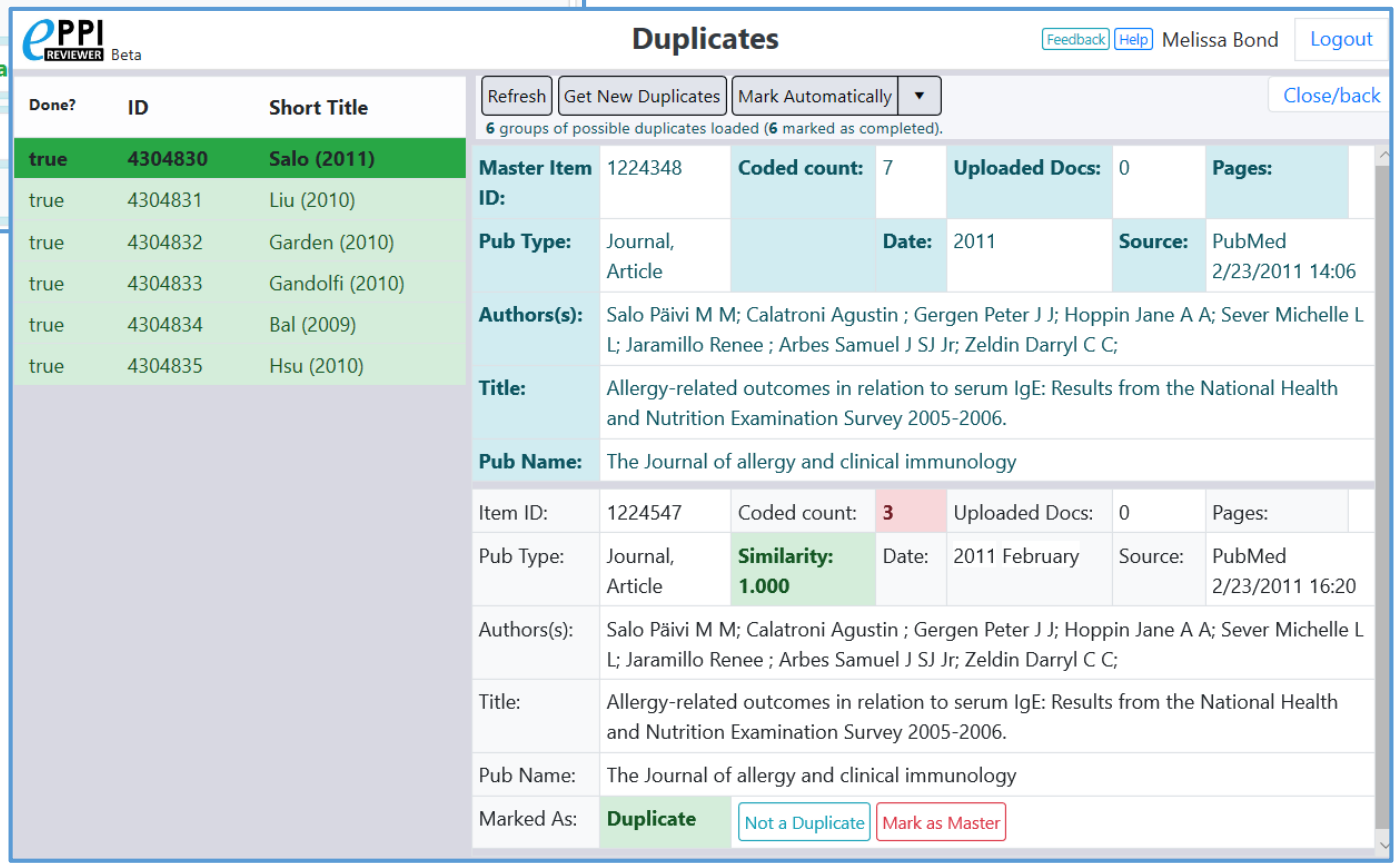
YouTube ER4: https://youtu.be/tdLI3RQXBKU

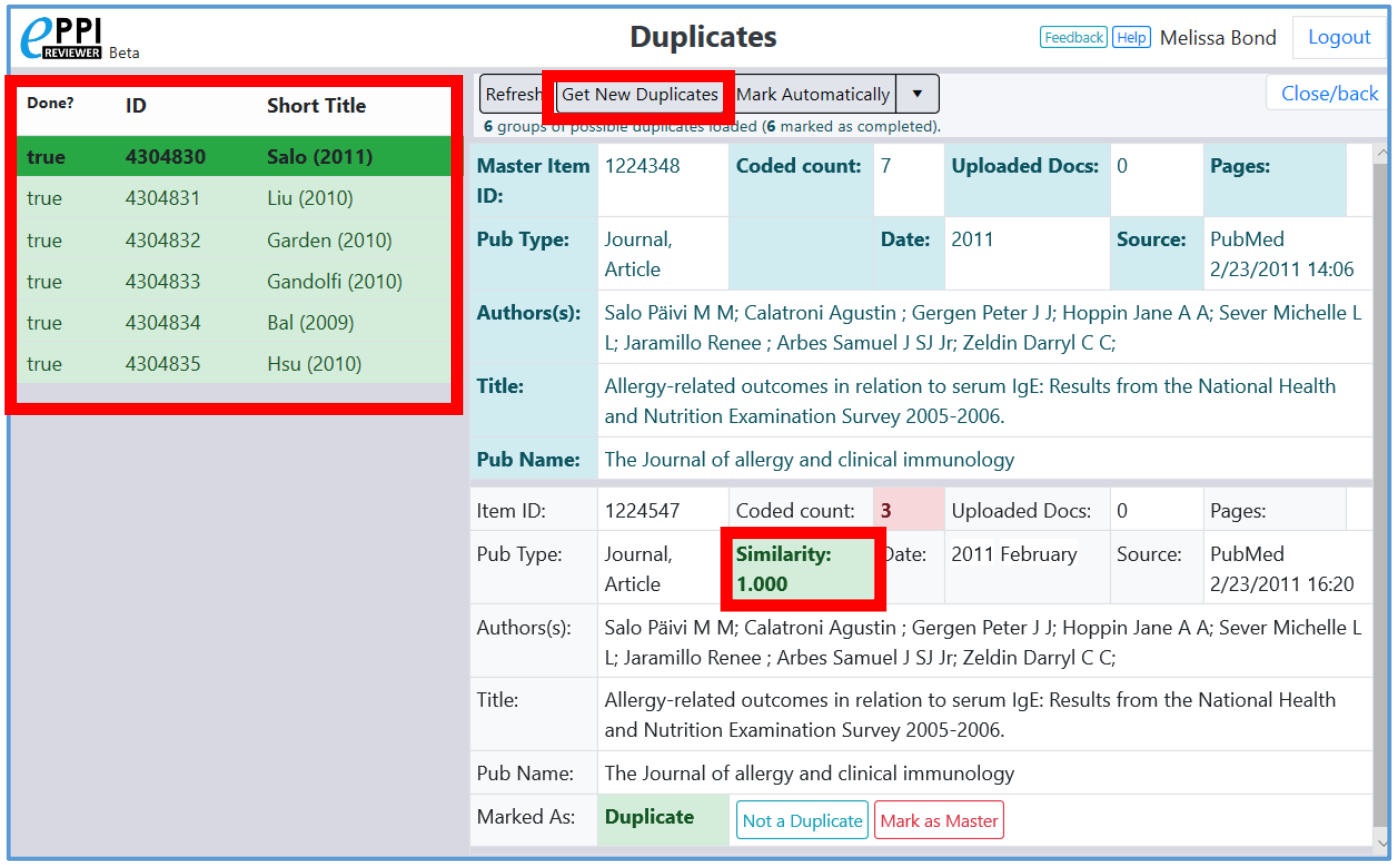
Managing duplicates – ER Web



Clicking the **Manage Duplicates** button opens the **Duplicates** window.



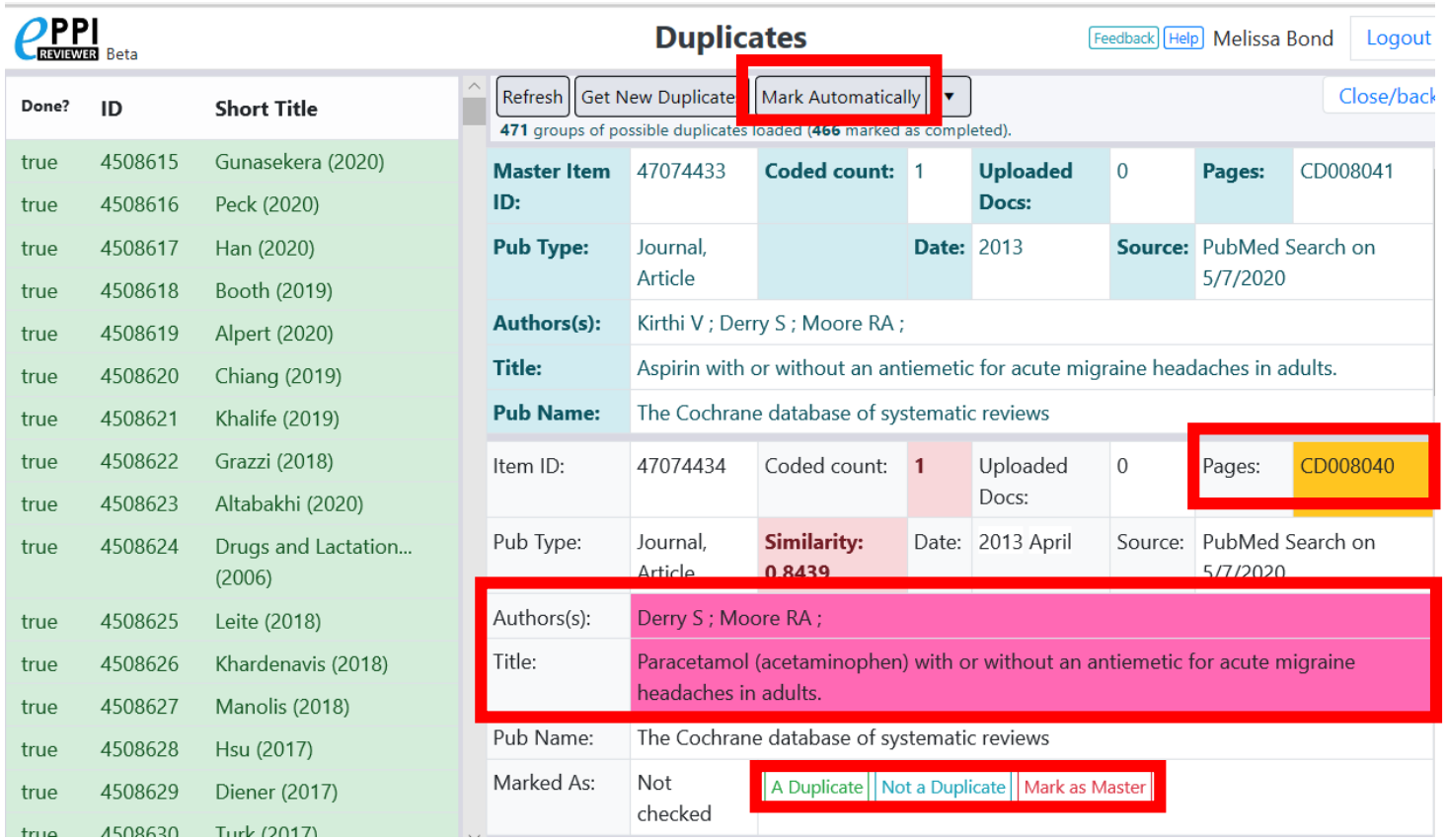
Managing duplicates – ER Web



To list duplicates <u>after</u> you have imported all items, click on **Get new duplicates**.

- Items will be grouped with similar references, with groups displayed on the left (completed groups are marked in green).
- Each item in the group is assigned a similarity score, compared to a Master item.

Managing duplicates – ER Web



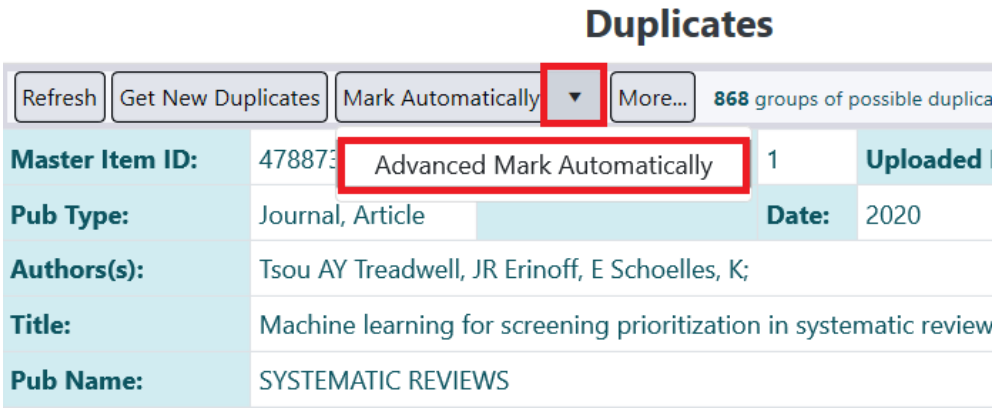
Mark Automatically will mark all items that have a similarity score of 1.00 as a duplicate. Complete groups are checked off.

- Incomplete groups will highlight any differences.
- User must mark items as **A duplicate**, **Not a duplicate** or **Mark as Master**.

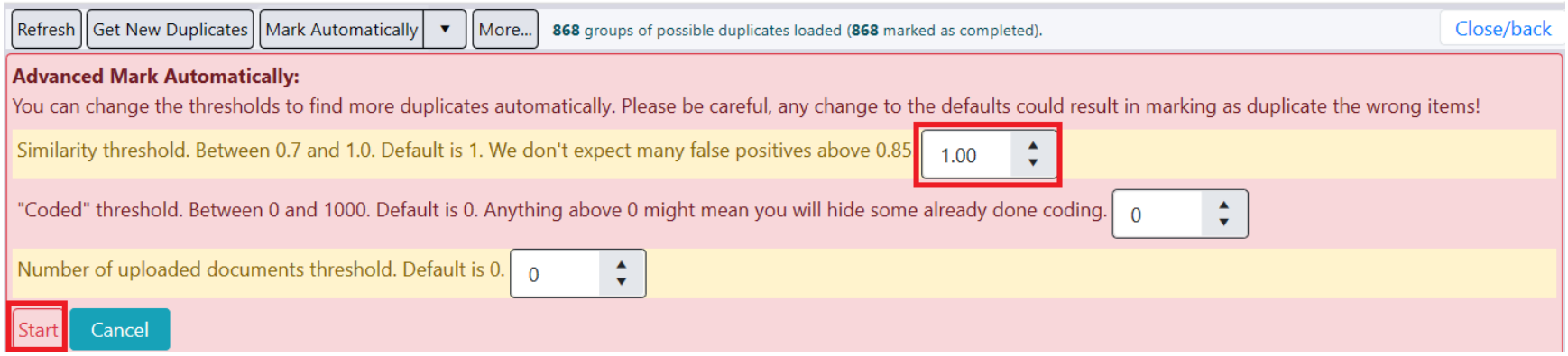
Managing duplicates – ER Web

In order to adjust the similarity score:

1. Click on the arrow next to ‘Mark Automatically‘.
2. Click on **Advanced Mark Automatically**.



3. Adjust the similarity threshold from 1.00 to your desired amount.
4. Click on **Start.**

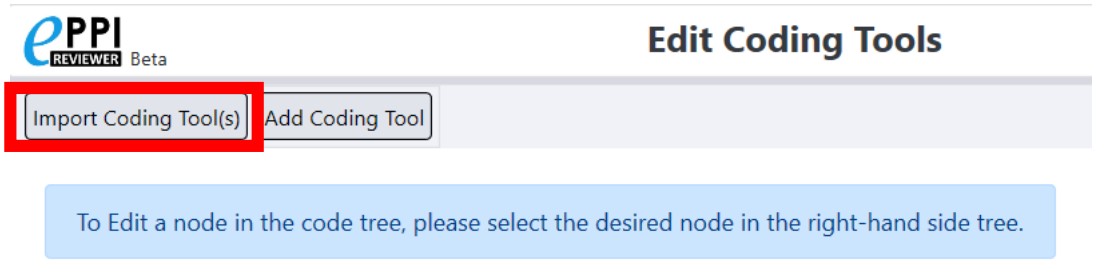


Webinar Topics

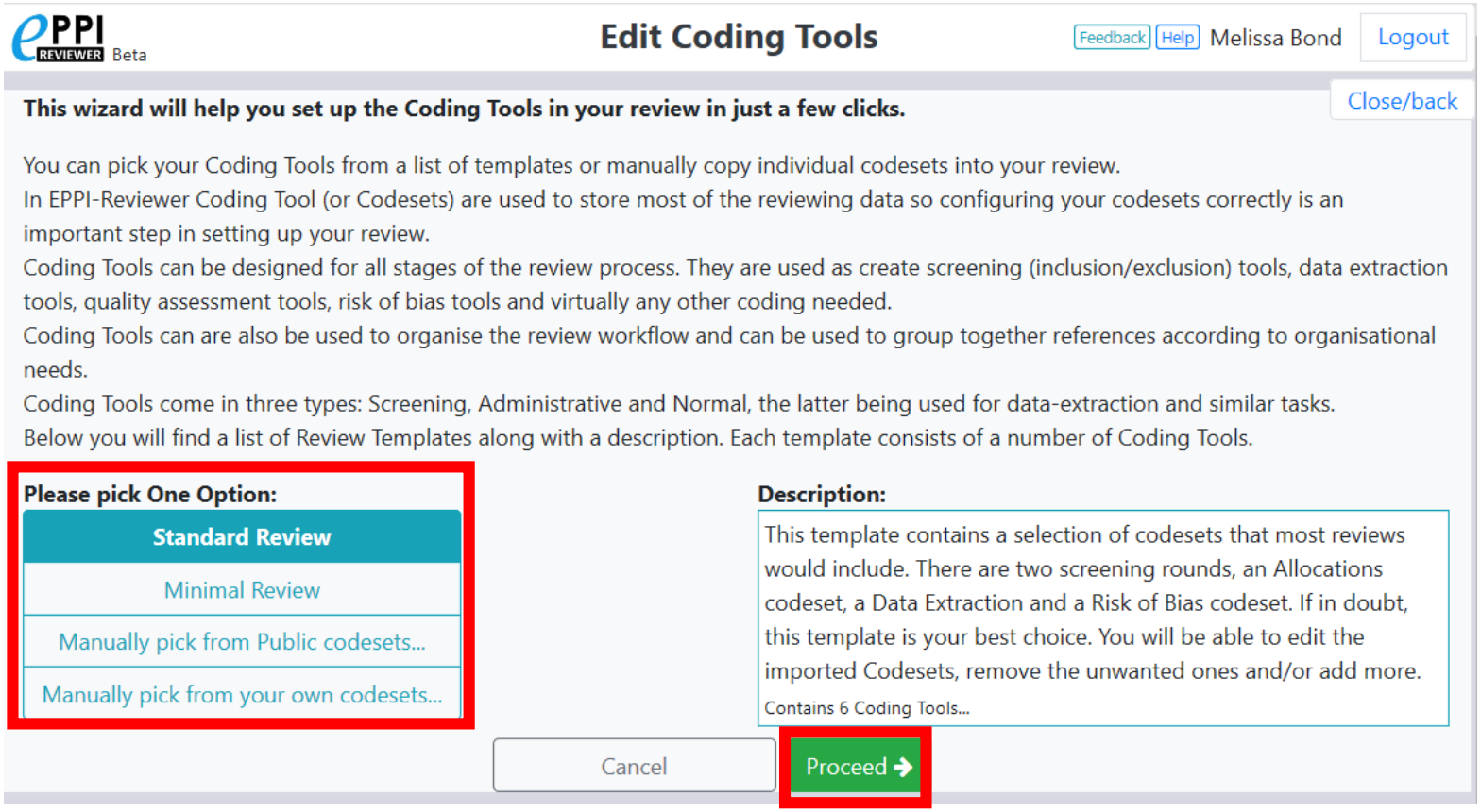
- ☐ ER admin and accessing help.
- ☐ Logging in and basic navigation of ER Web.
- ☐ Importing references.
- ☐ Managing duplicates.
- ☐ Adding and editing coding tools/codes.
- ☐ Creating coding assignments.
- ☐ Line-by-line PDF coding.
- ☐ Generating reports.
- ☐ How to create Interactive Evidence Gap Maps.
- ☐ Any other questions?

YouTube: https://youtu.be/bGTyqe_ySyA

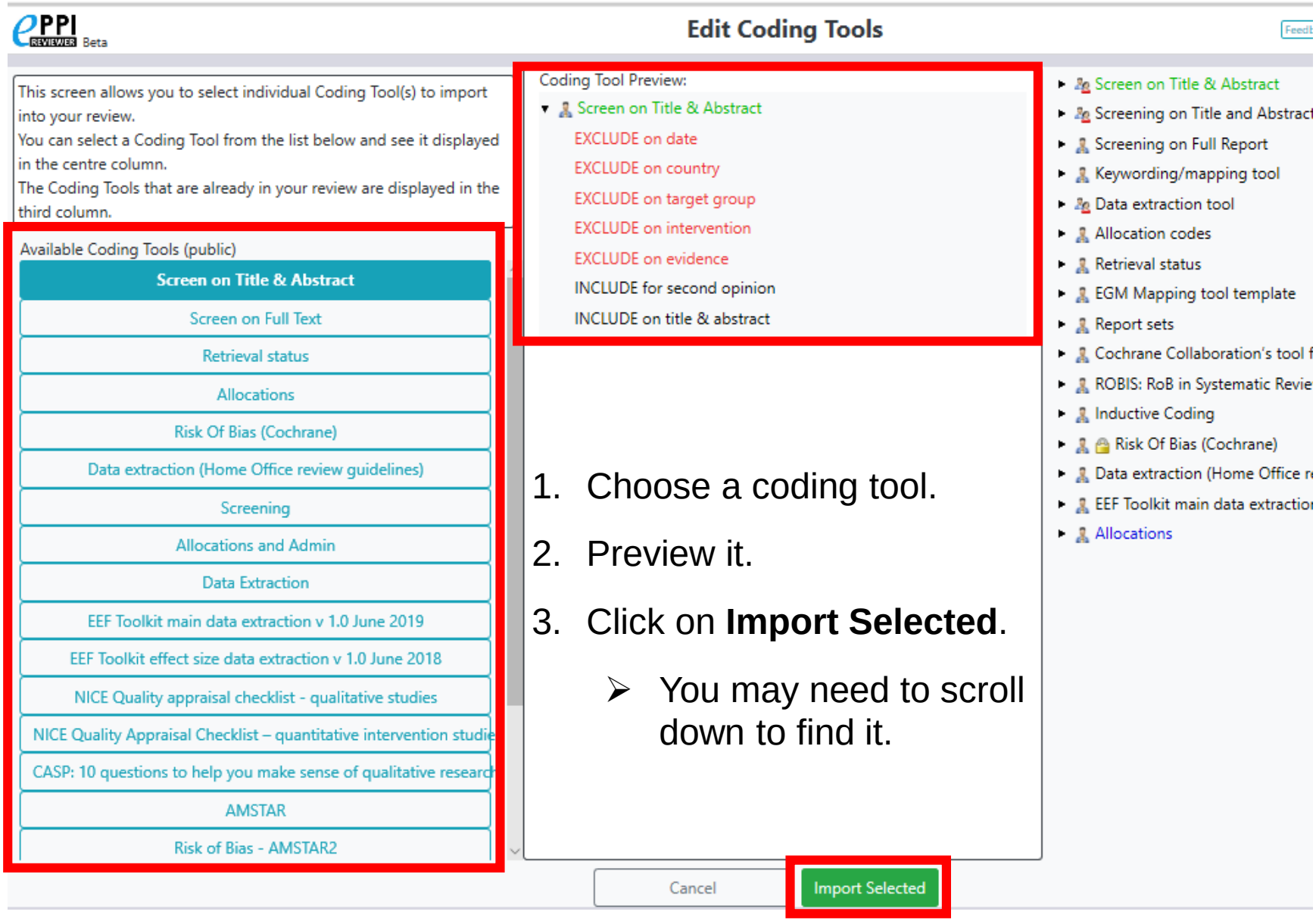
Importing coding tools



1. Click on **Import Coding Tool(s).**
2. Choose the type of coding tool from the list.
3. Click on **Proceed**.



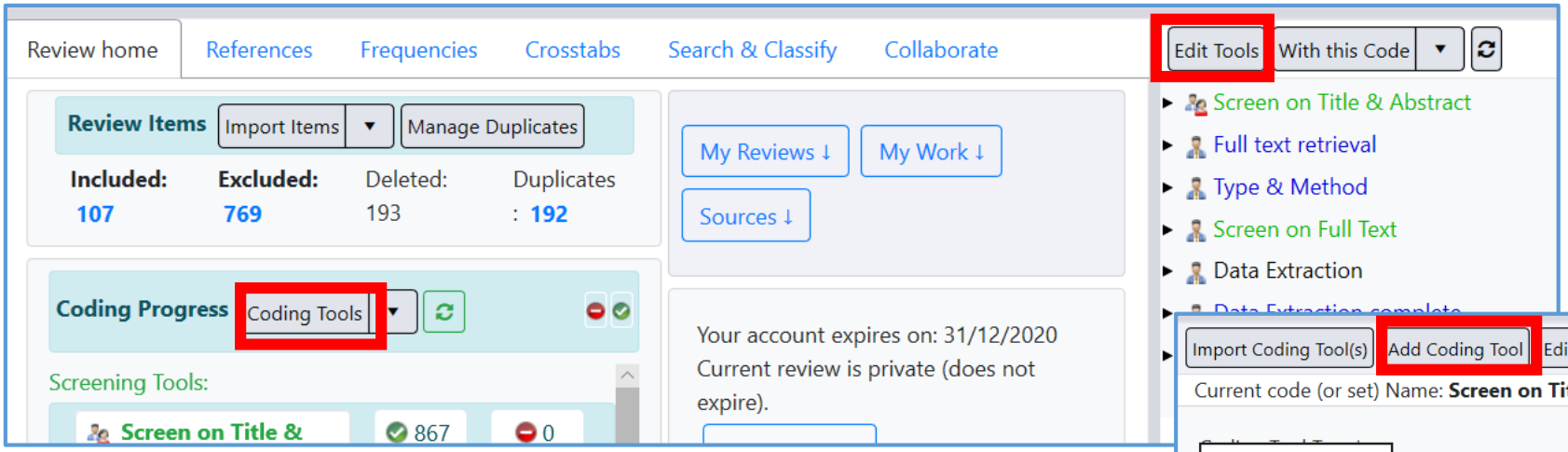
Importing public coding tools

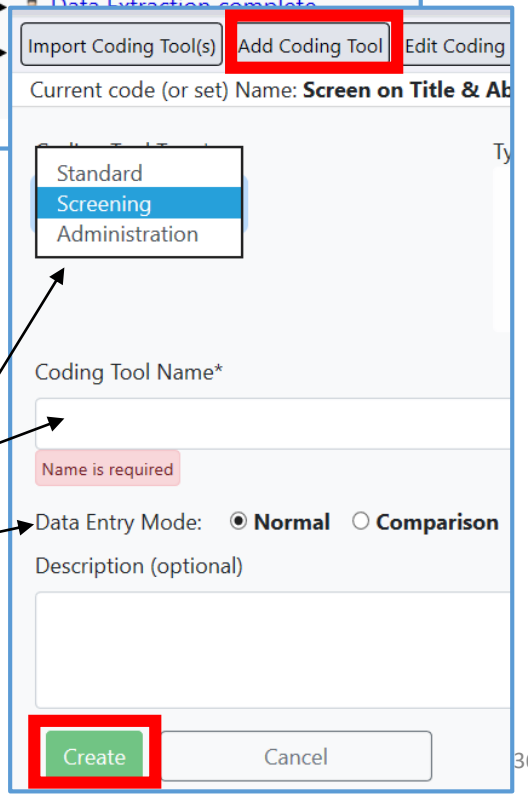


1. Choose a coding tool.
2. Preview it.
3. Click on **Import Selected**.
   - ➢ You may need to scroll down to find it.

Creating coding tools

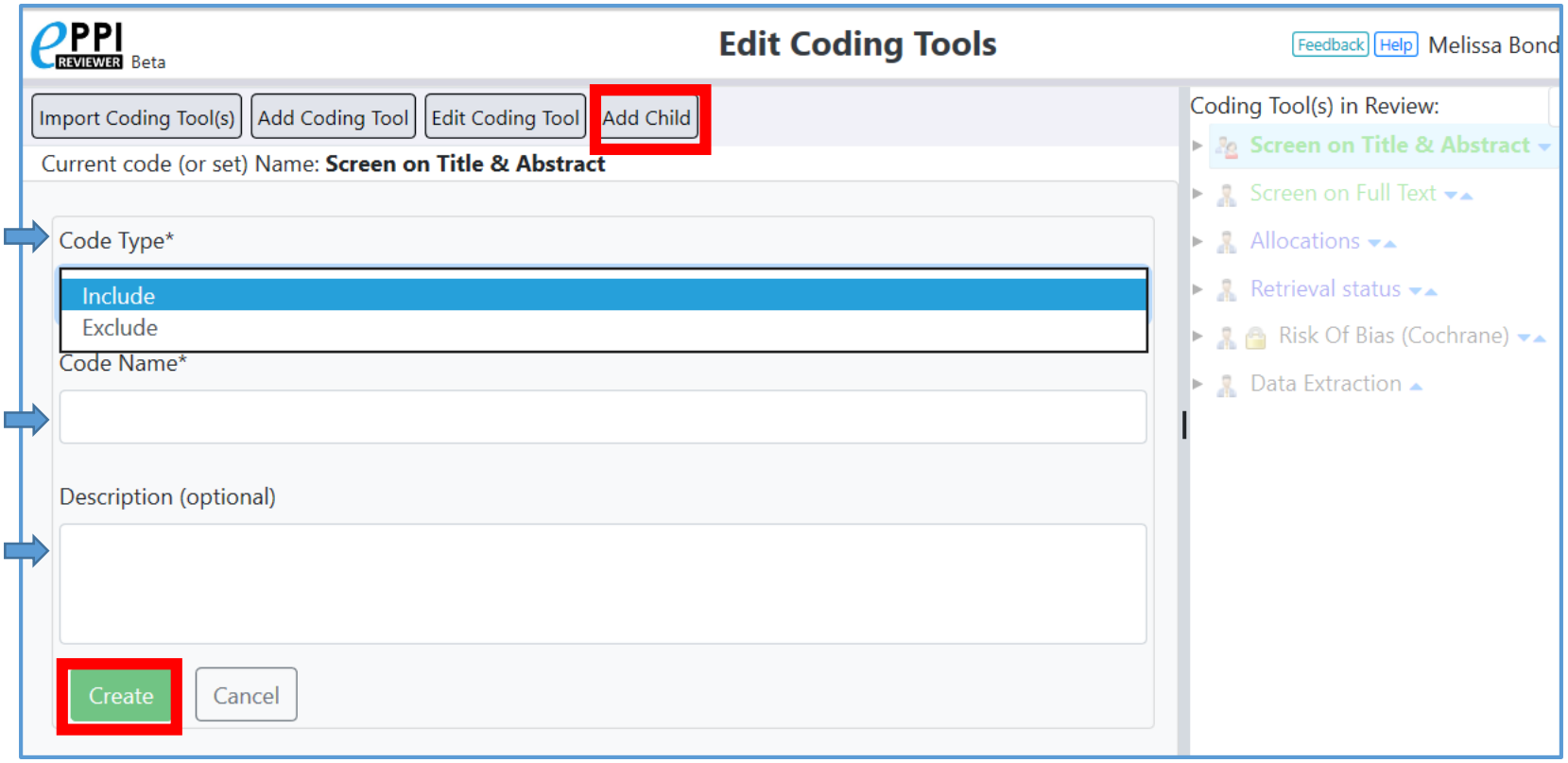
Video: https://youtu.be/bGTyqe_ySyA





1. Either click on **Coding Tools** or **Edit Tools**.
2. Click on **Add Coding Tool**.
3. Select the tool type and give the coding tool a name.
4. Select Normal or Comparison (double) coding.
5. Click **Create**.

Creating child codes



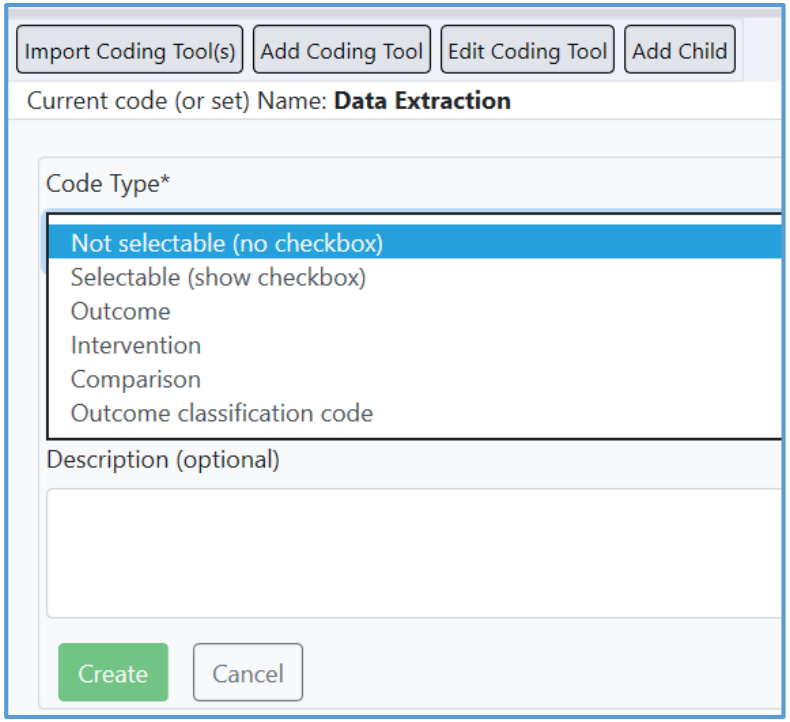
1. Select a coding tool or code in the panel on the right.
2. Click on **Add Child**.
3. Select Code Type, type in a code name and a description.
4. Click **Create.**

Video: https://youtu.be/bGTyqe_ySyA

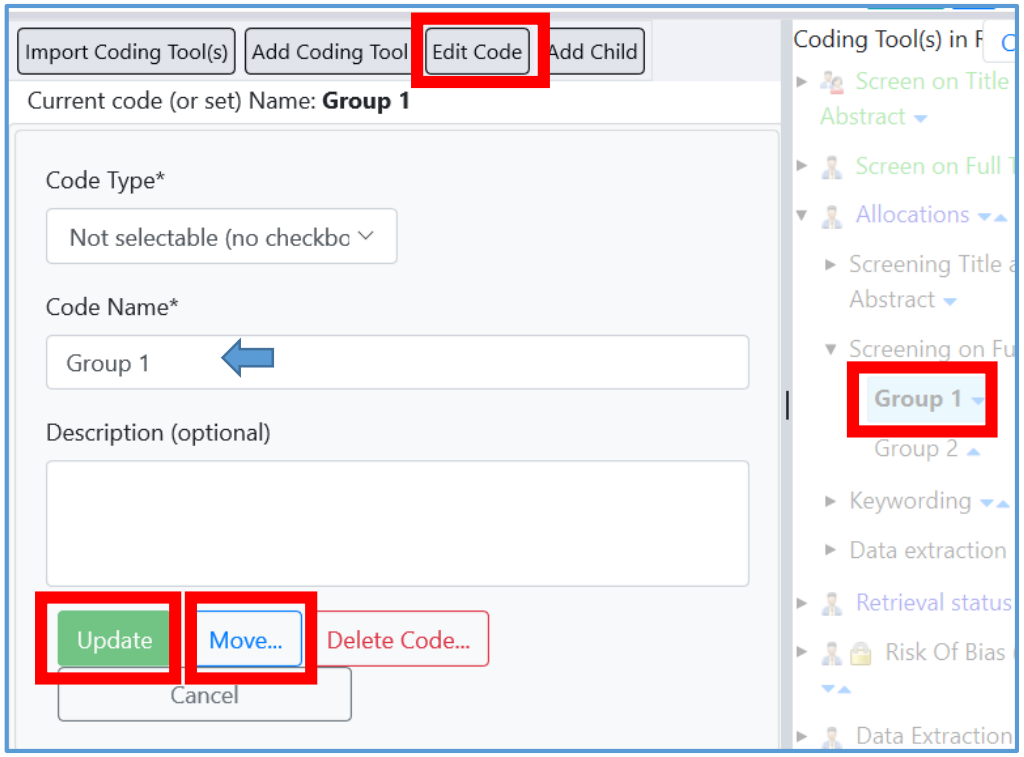
Code types

Standard coding tool

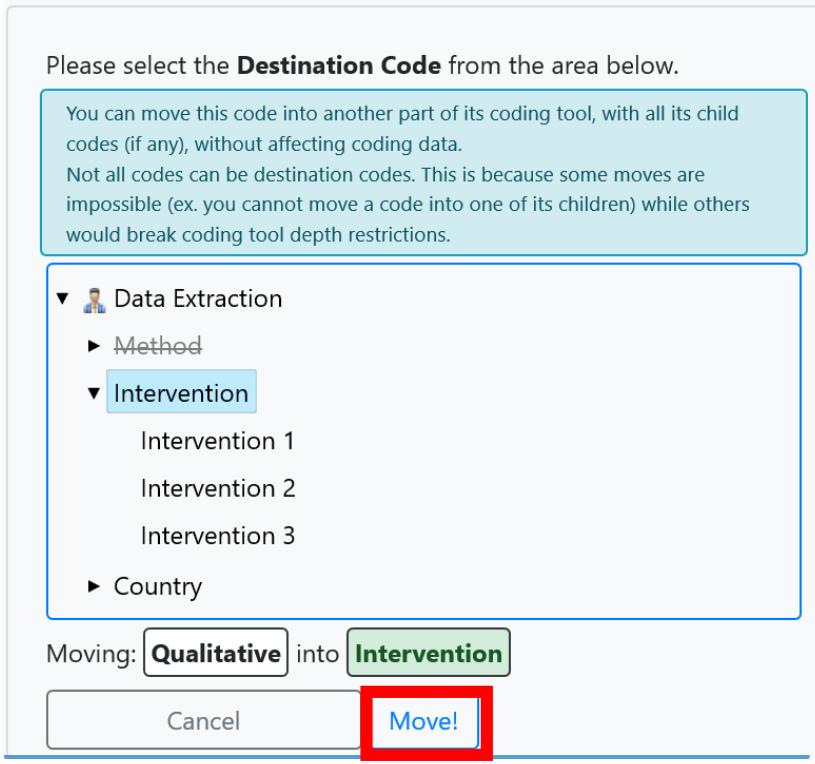
- Selectable (checkbox) or not selectable (no checkbox)
- Outcome, Intervention and Comparison code types for numeric outcome data.
- Outcome classification codes for classifying your different outcomes.



Editing child codes



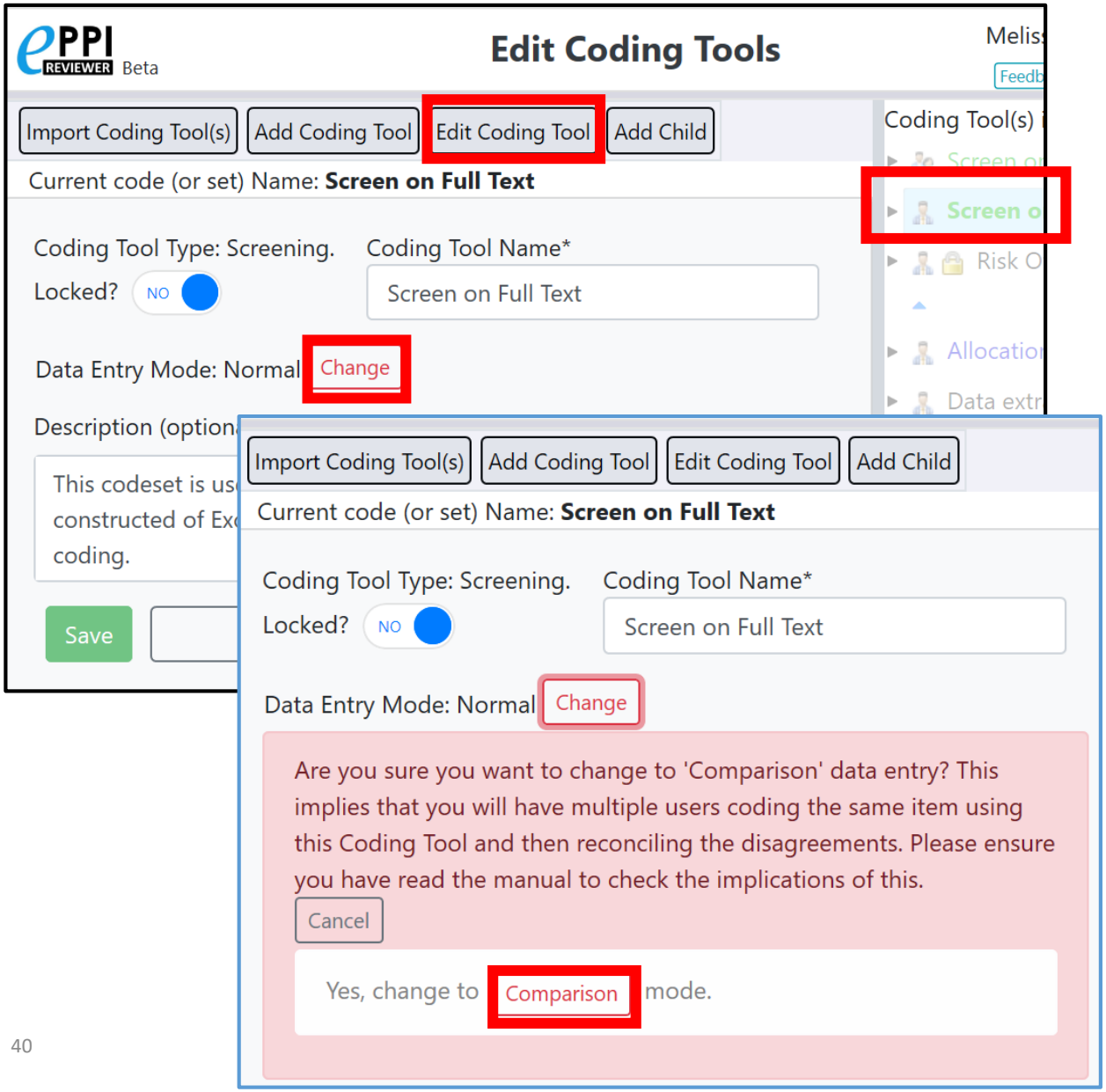
1. Select the code on the right hand side.
2. Click on **Edit Code**.
3. Type in the new code name.
4. Click on **Update**.



5. To move a code, either use the blue up and down arrows, or click on **Move…**
6. Choose where to move the code to.
7. Click on **Move!**

Video: https://youtu.be/bGTyqe_ySyA

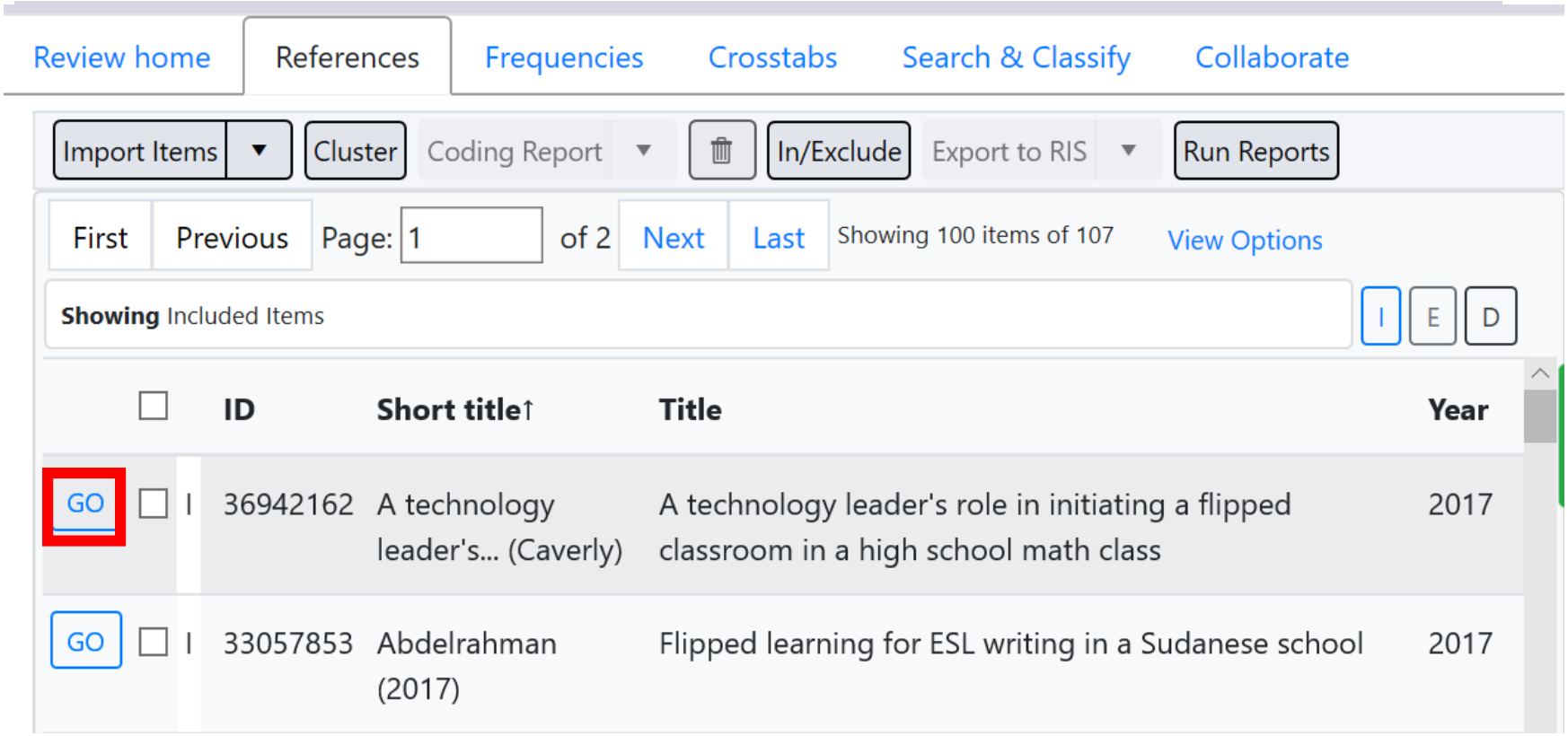
Changing coding tool data entry mode



Video: https://youtu.be/6-T9oClAsJI

1. Select the coding tool on the right hand side.
2. Click on **Edit Coding Tool**.
3. Click on the red **Change** button.
4. Confirm that you would like to change to comparison mode, by clicking on the red **Comparison** button.

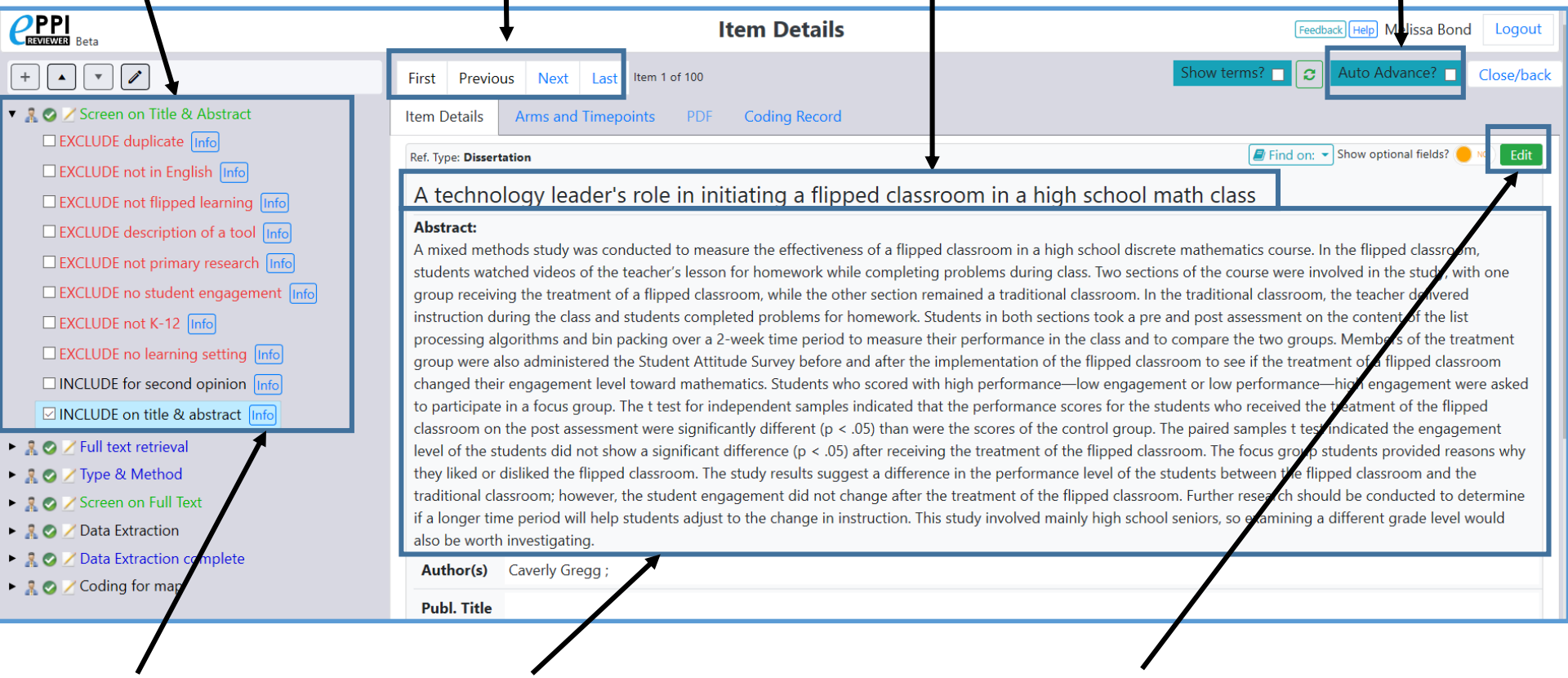
References Tab



1. Click on View Options to customise your item view.
2. Change the Page size number, to change the number of items displayed on the page.
3. Click on **GO** next to an item to view that record.

Viewing items – ER Web

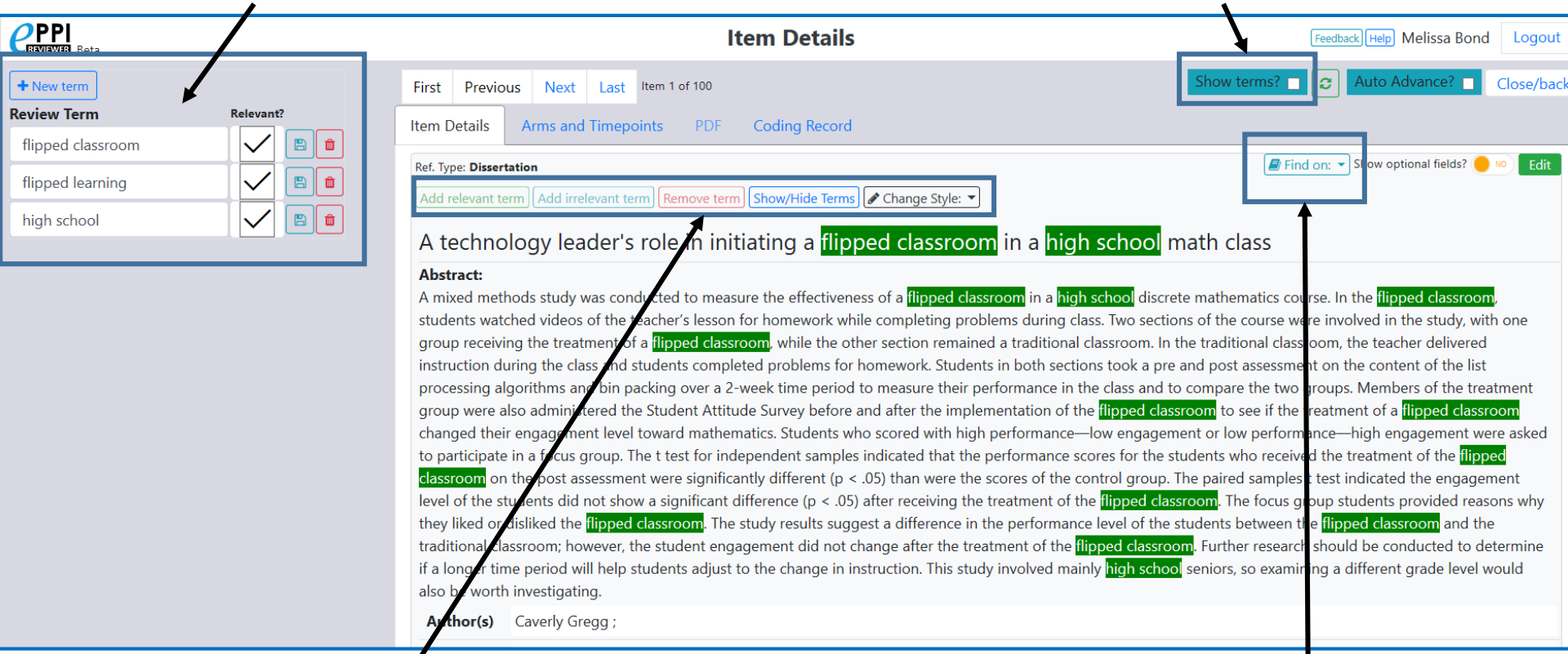
The EPPI-Reviewer Web Item Details interface.



Viewing items – ER Web

Customise phrases

Show relevant and irrelevant terms



Add terms or change the style

Find PDF

Webinar Topics

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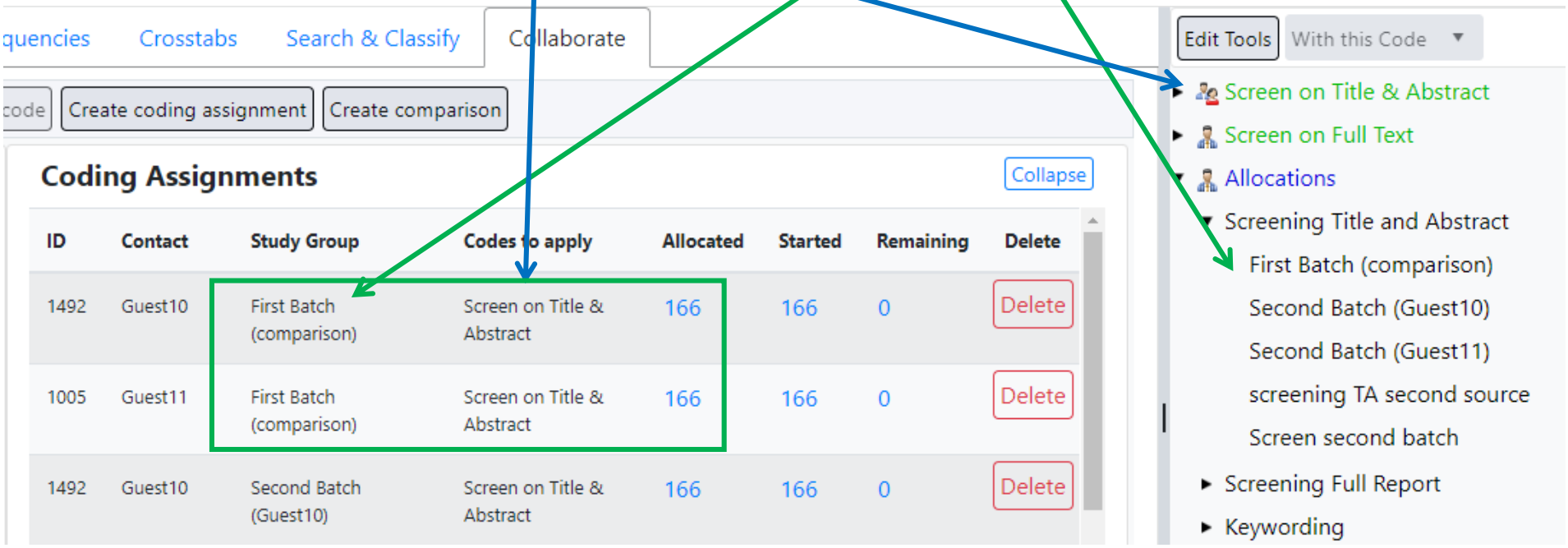
YouTube: https://youtu.be/p8xkMk9KKWQ

Coding Assignments

Coding Assignments allow you to assign work and track progress.

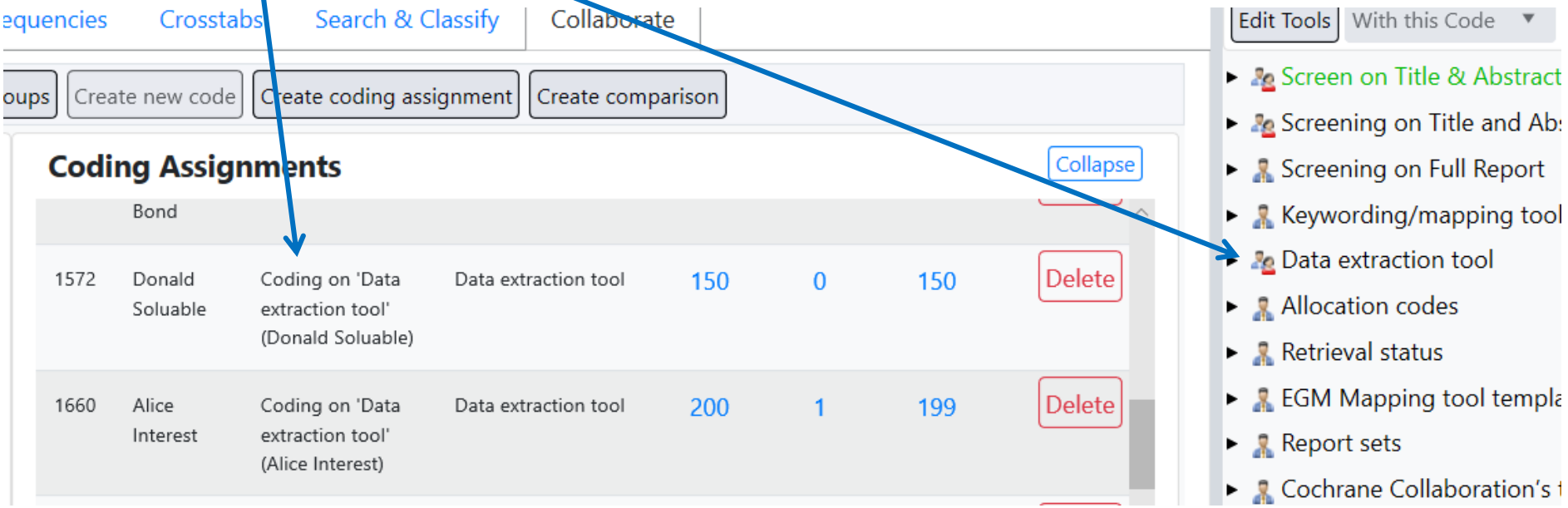
- Each assignment uses one code to identify groups of references and indicates one coding-tool to use.



YouTube: https://youtu.be/p8xkMk9KKWQ

Coding Assignments

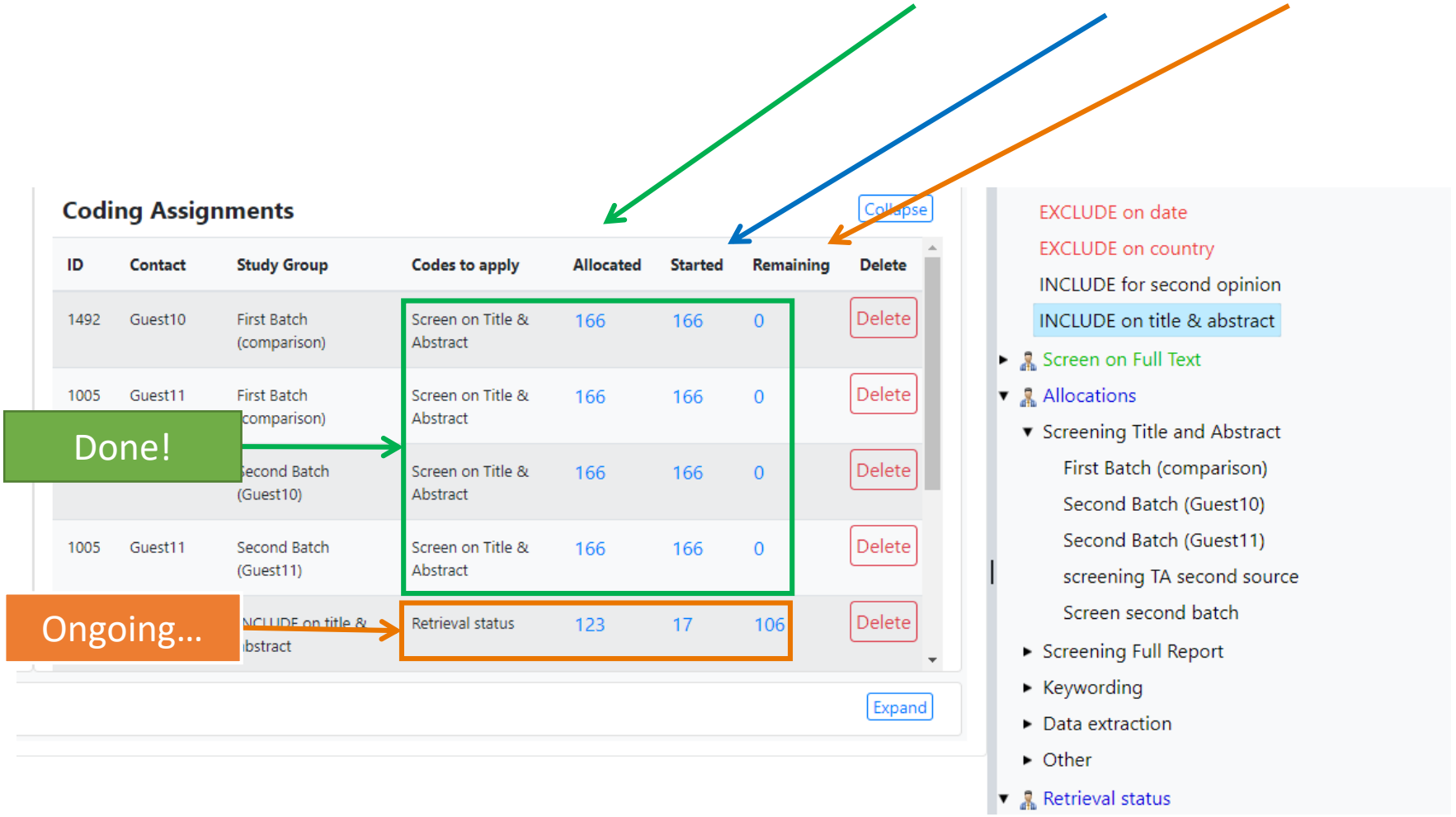
You can also assign screening or data extraction codes to a Coding Assignment.



YouTube: https://youtu.be/p8xkMk9KKWQ

Coding Assignments

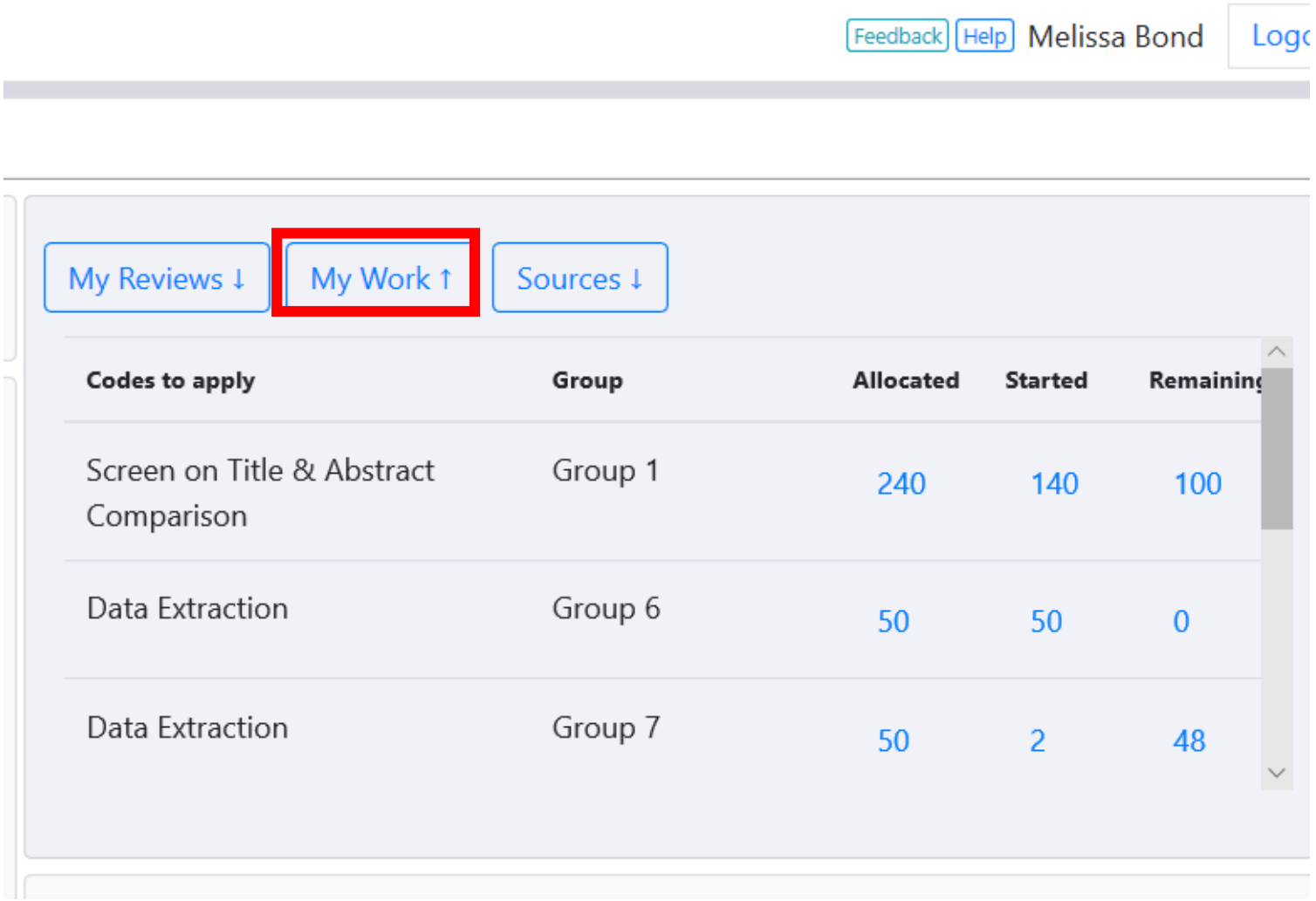
Each assignment reports updated numbers: Allocated, Started and Remaining



YouTube: https://youtu.be/p8xkMk9KKWQ

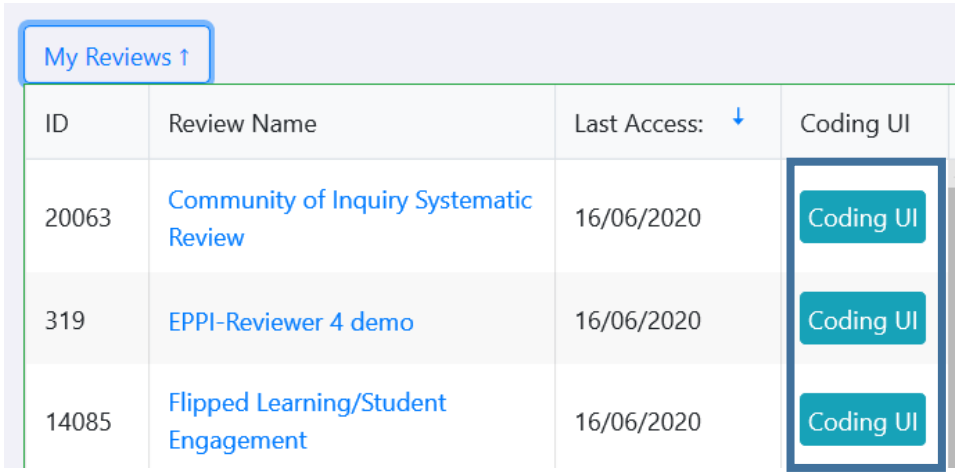
Coding Assignments

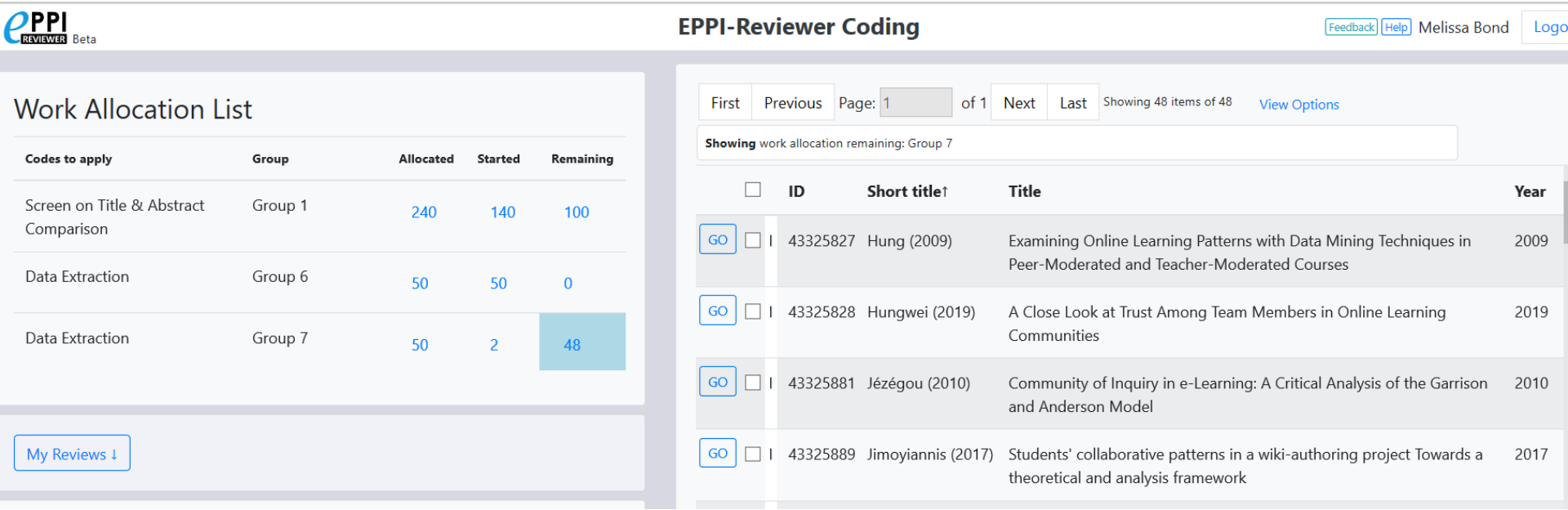
Assignments show up under the My Work tab (on the Review Home page):



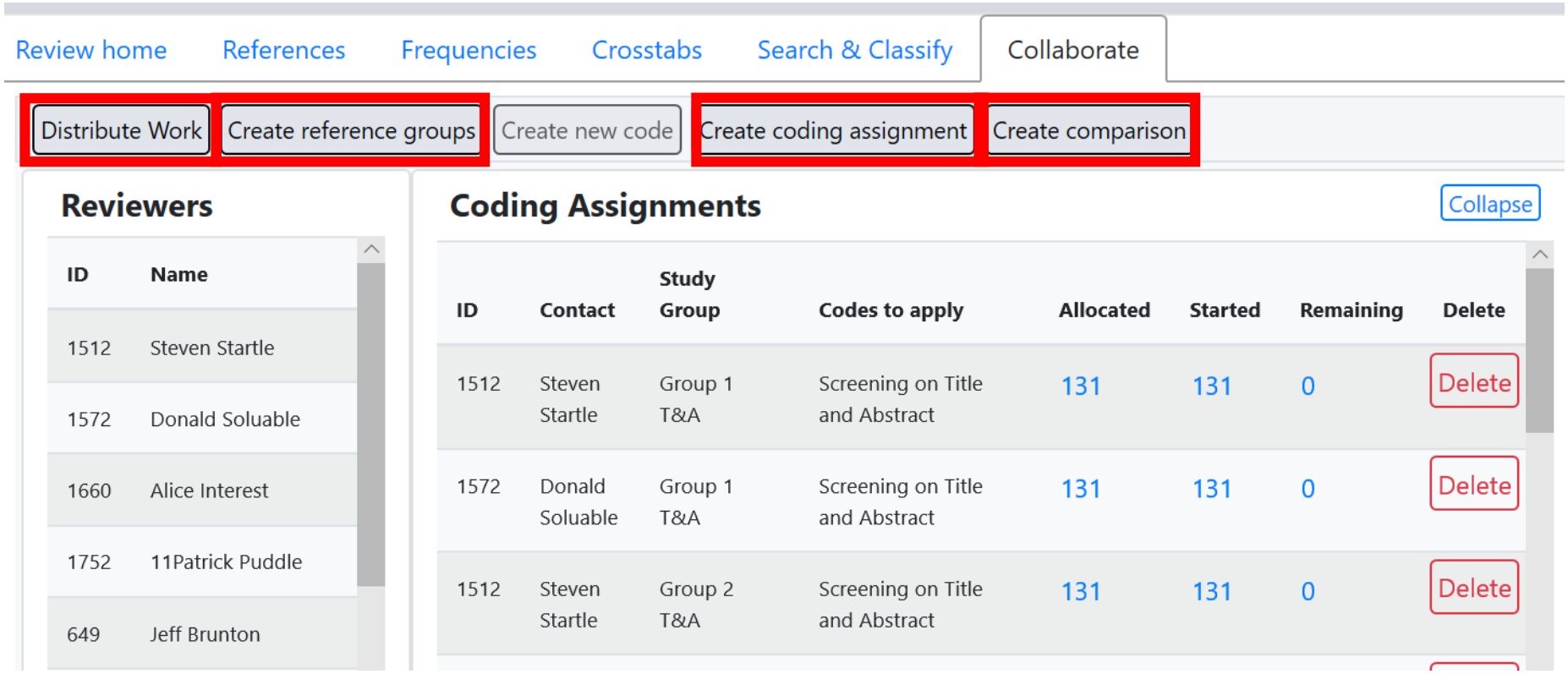
Coding Assignments

They also allow people to use the coding only interface (by clicking on a Coding UI button).





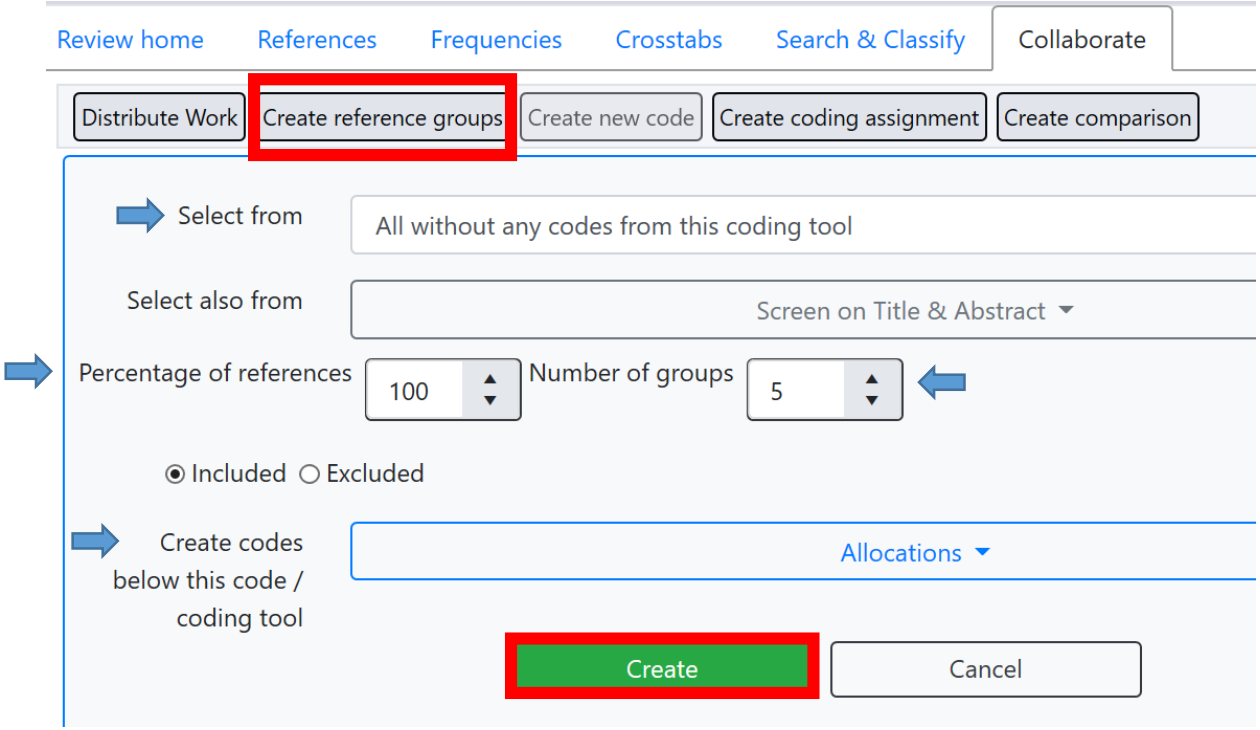
Collaborate tab



Brings together work distribution tools.

- Create reference groups and coding assignments manually.
- Allocate work using the new Distribute Work wizard.
- Create comparison reports if you have double coded items.

Creating reference groups



HELPFUL TIP:

Rename the group codes created to something unique immediately, e.g. Group 1 Screen on T&A

1. In the Collaborate tab, click on **Create reference groups**.
2. Choose which items to include.
3. Choose the percentage of items and number of groups to include.
4. Choose where to create the codes.
5. Click on **Create**.

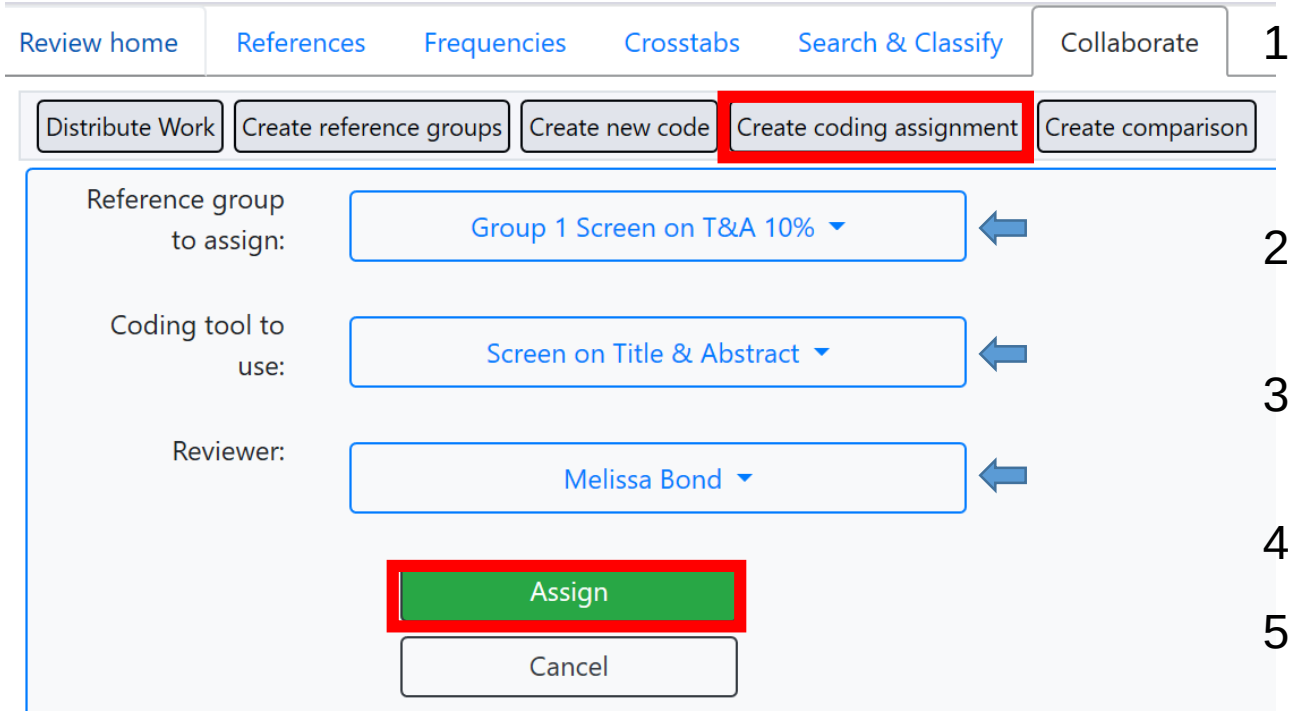
Video: https://youtu.be/p8xkMk9KKWQ

Creating coding assignments

Coding Assignments

Video: https://youtu.be/p8xkMk9KKWQ

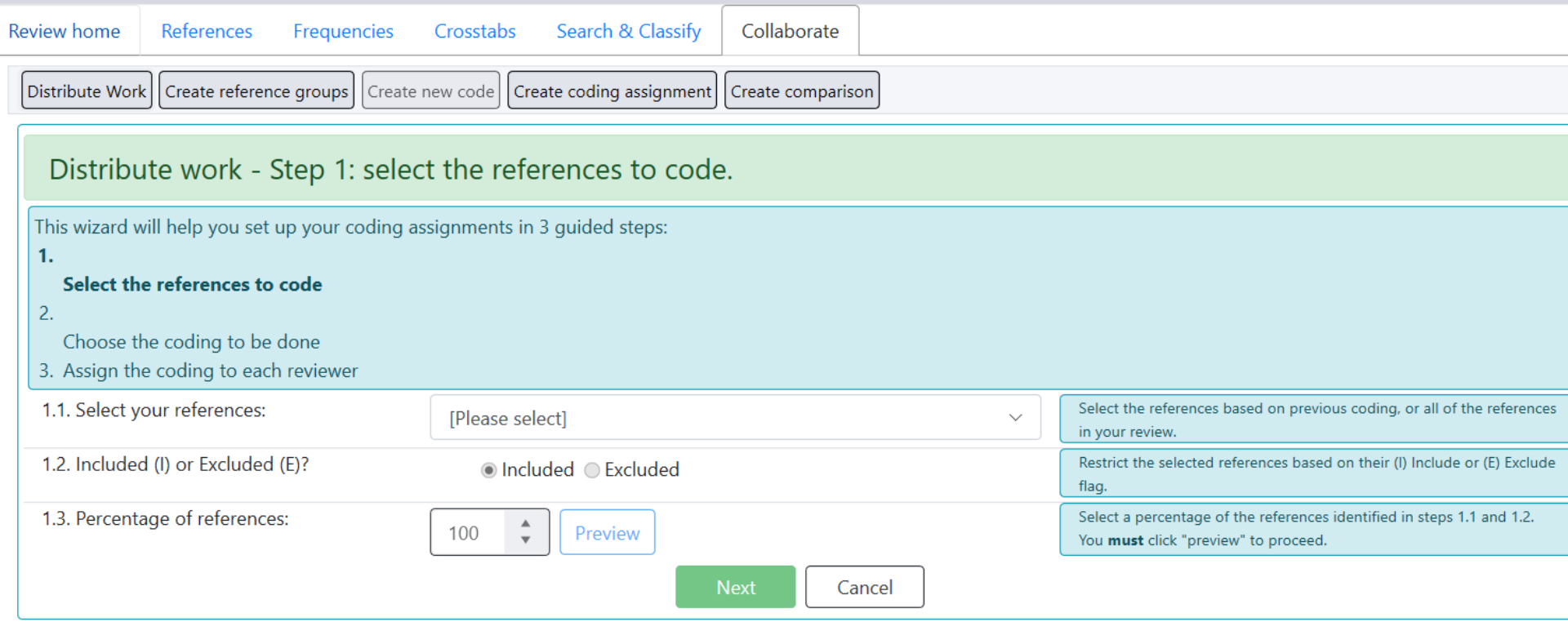
ID	Contact	Study Group	Codes to apply	Allocated	Started	Remaining
8451	Melissa Bond	Group 1 Screen on T&A 10%	Screen on Title & Abstract	18	0	18



1. In the Collaborate tab, click on **Create coding assignment**.
2. Choose the reference group to assign.
3. Choose the coding tool.
4. Choose the reviewer.
5. Click on **Assign**.

Work Distribution Wizard

This will now be demonstrated live.



YouTube: https://youtu.be/A6KWCWx0jwI

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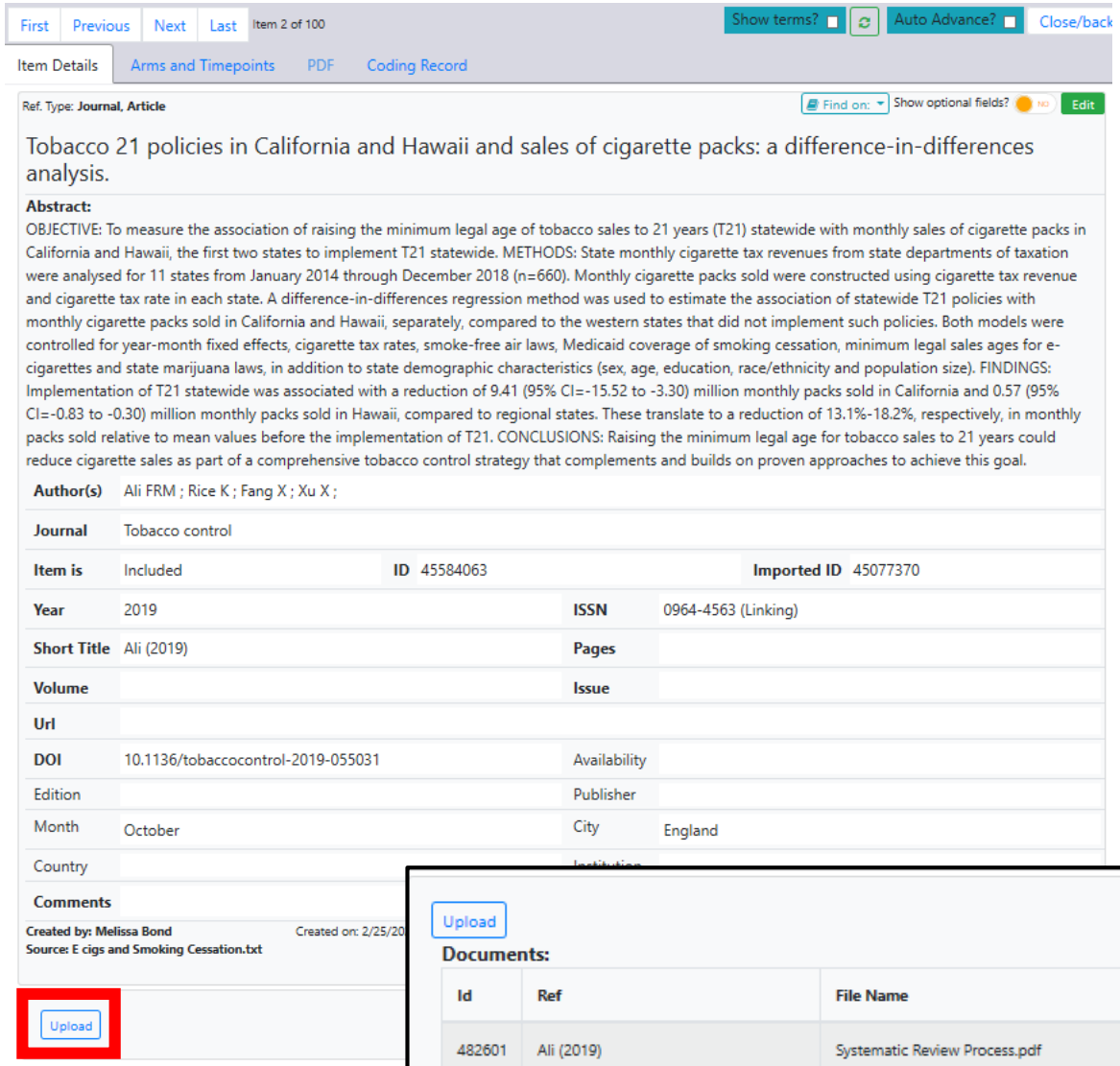
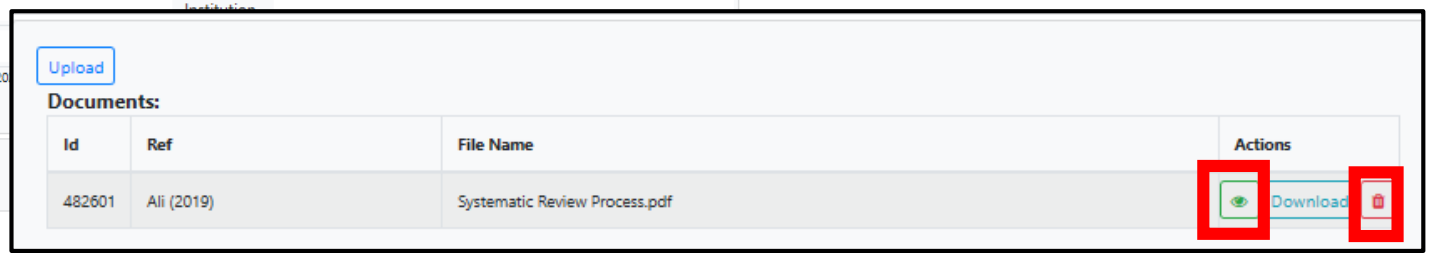
YouTube: https://youtu.be/9eP70M4a9iE

Uploading PDFs



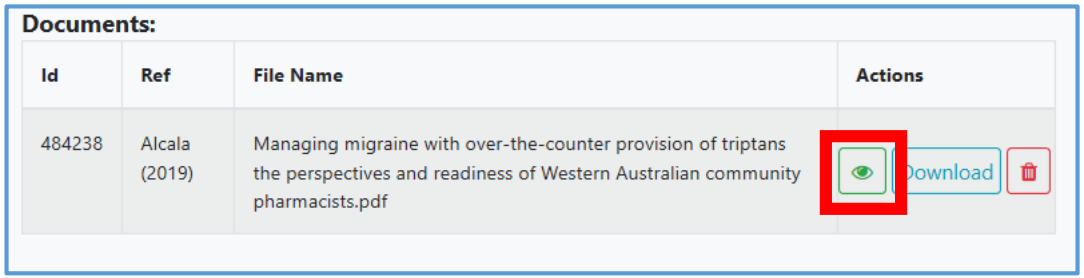


- Click on **Upload** at the bottom of the item record.
- Select the file you want to upload and click on Open.
- Your file will now appear at the bottom of the item record, in the Documents panel.
- To view the PDF, click on the green eye icon.
- To delete the PDF, click on the red trash icon.

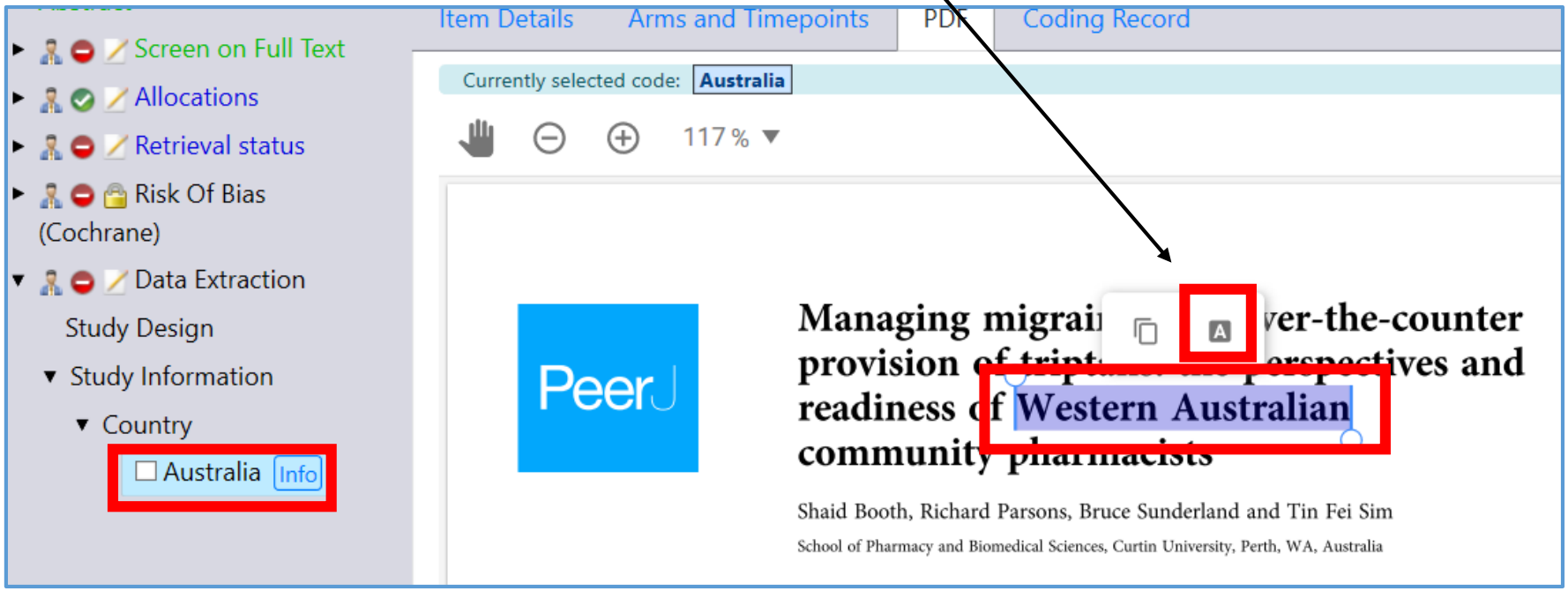
Line by Line PDF Coding – ER Web

Video: https://youtu.be/9eP70M4a9iE

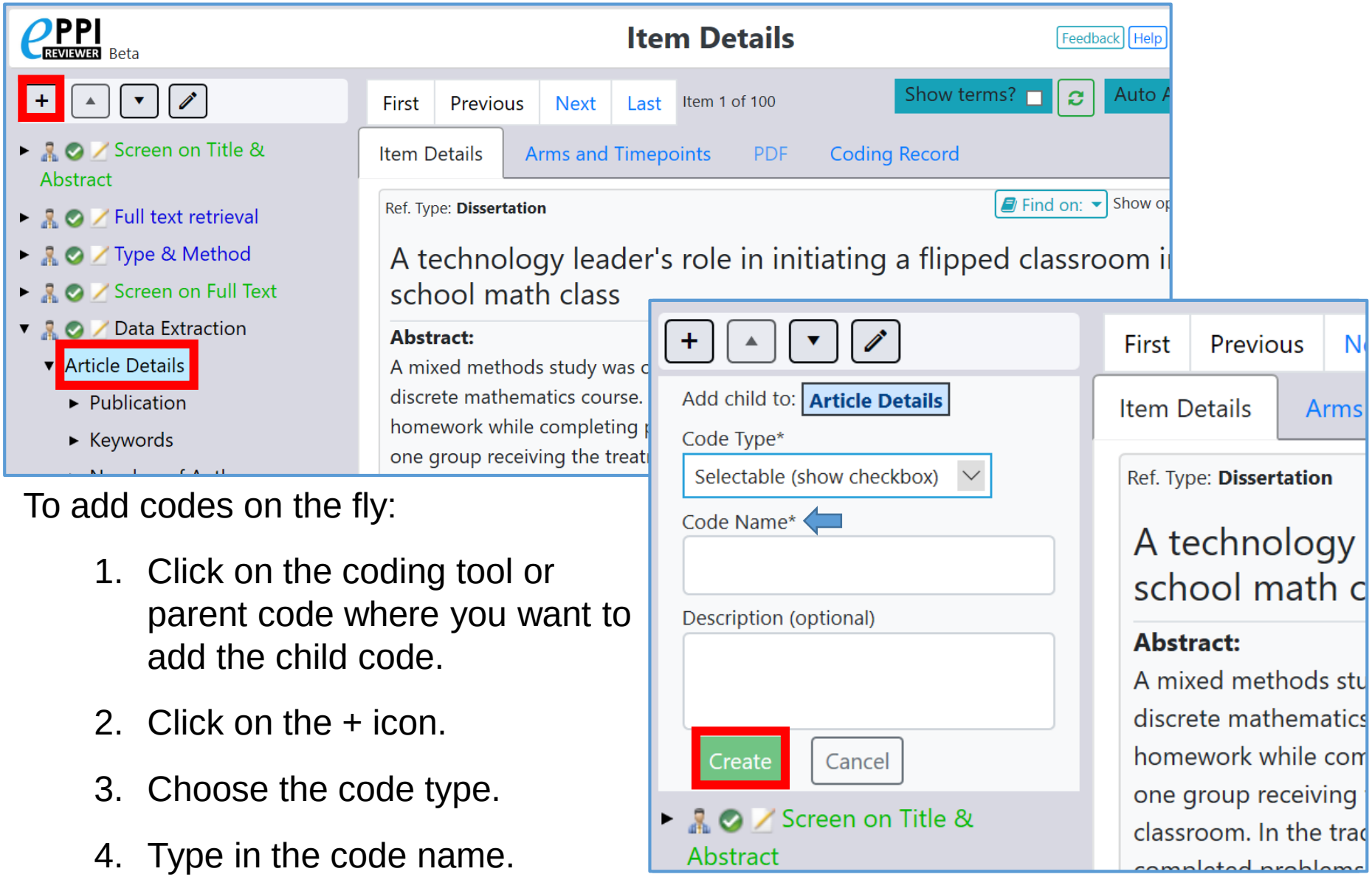
1. Click on the **green eye icon** to display the PDF.
2. Highlight the text in the PDF you want to code.



3. Click on the code it should be assigned to.
4. Click on the **Highlight** button (Black with an A symbol).



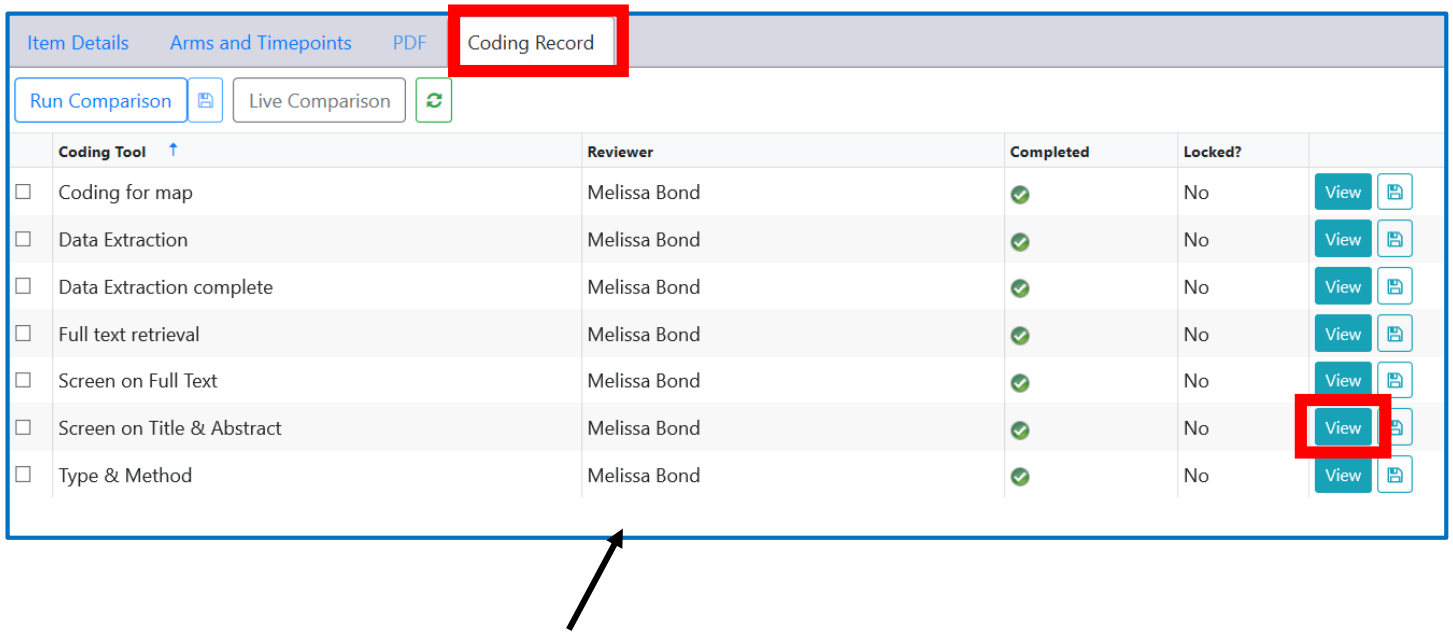
Inductive Coding



To add codes on the fly:

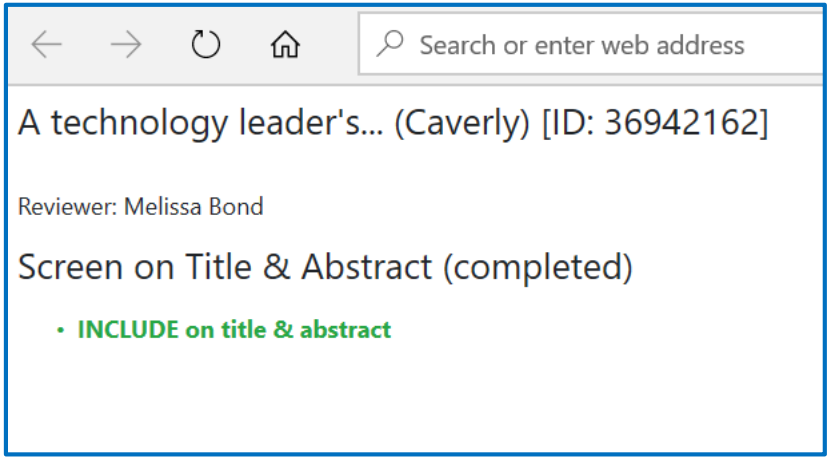
1. Click on the coding tool or parent code where you want to add the child code.
2. Click on the + icon.
3. Choose the code type.
4. Type in the code name.
5. Click on **Create**.

Viewing coding record – ER Web



To see what you have coded at any time, click on **Coding record** and then **View**.

- Keeps a thorough record of every coding decision made by all review members.



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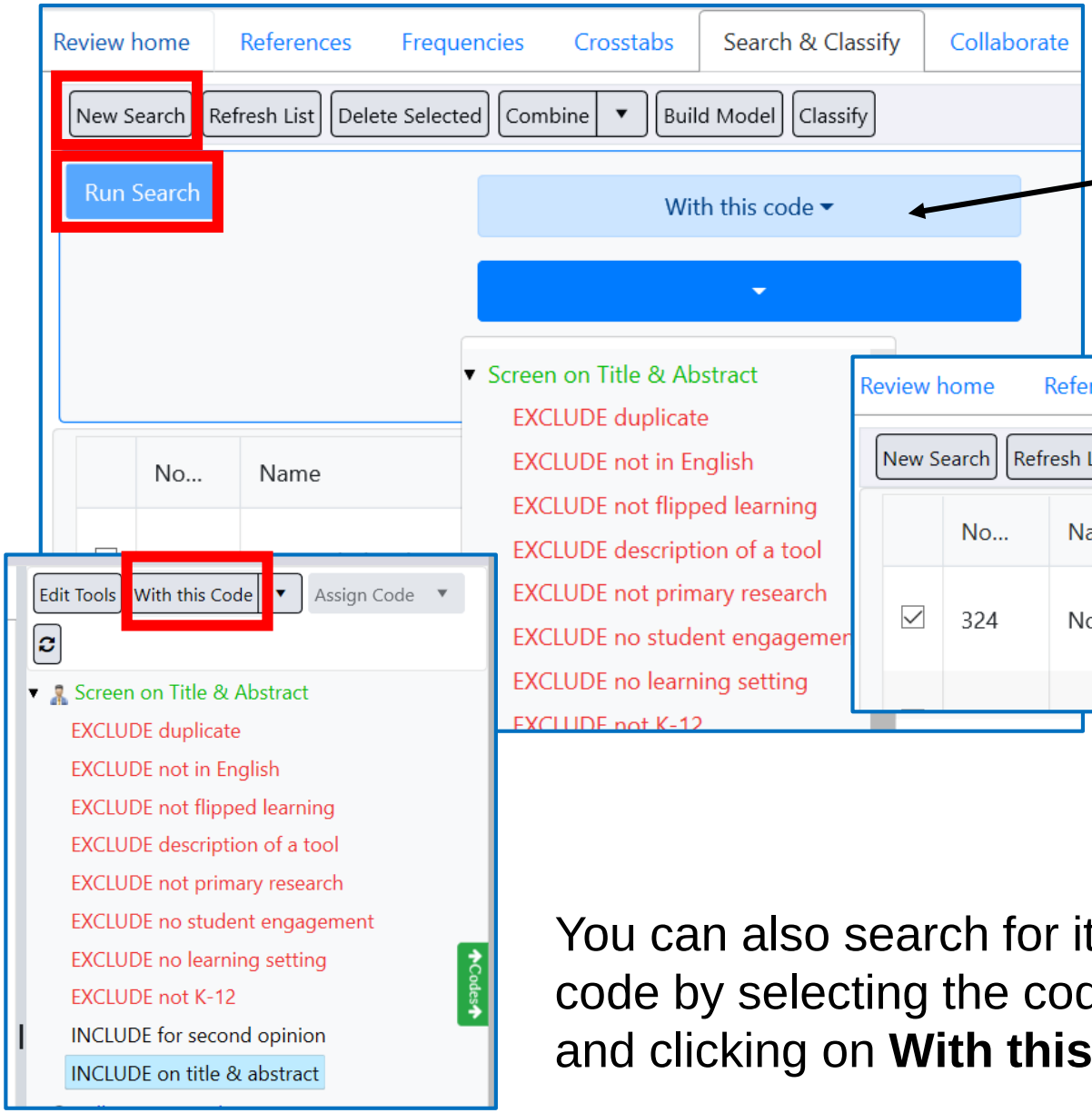
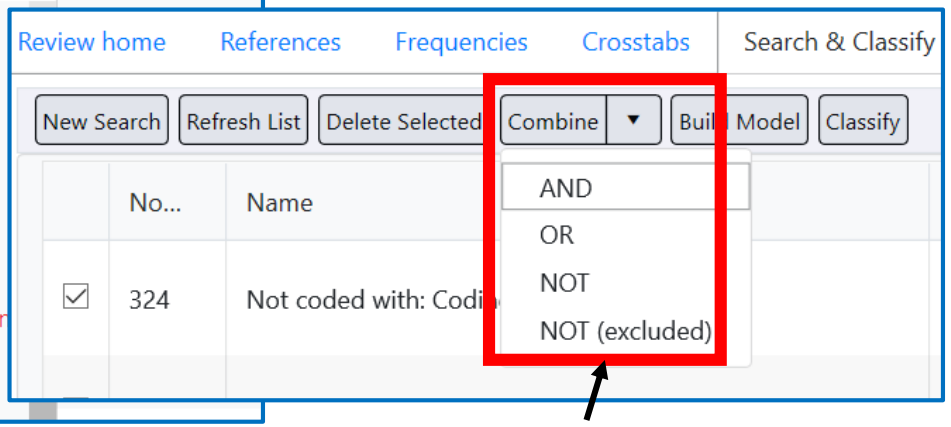
YouTube: https://youtu.be/iGXgpb4bwFg

Searching ER Web



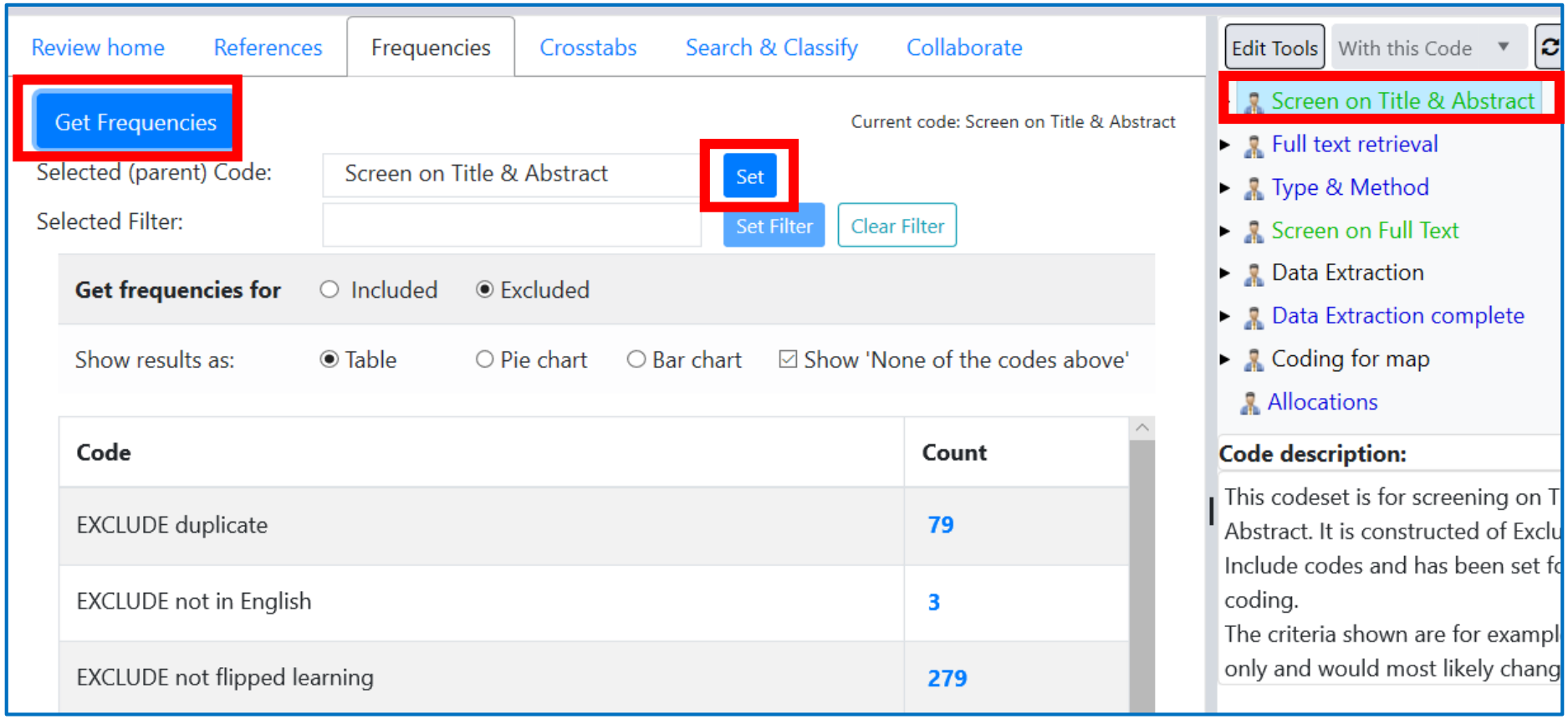


1. Click on **New Search**.
2. Choose how you want to search for your items.
3. Click on **Run Search**.

Combine searches with boolean operators.

You can also search for items with a specific code by selecting the code in the Codes panel, and clicking on **With this Code**.

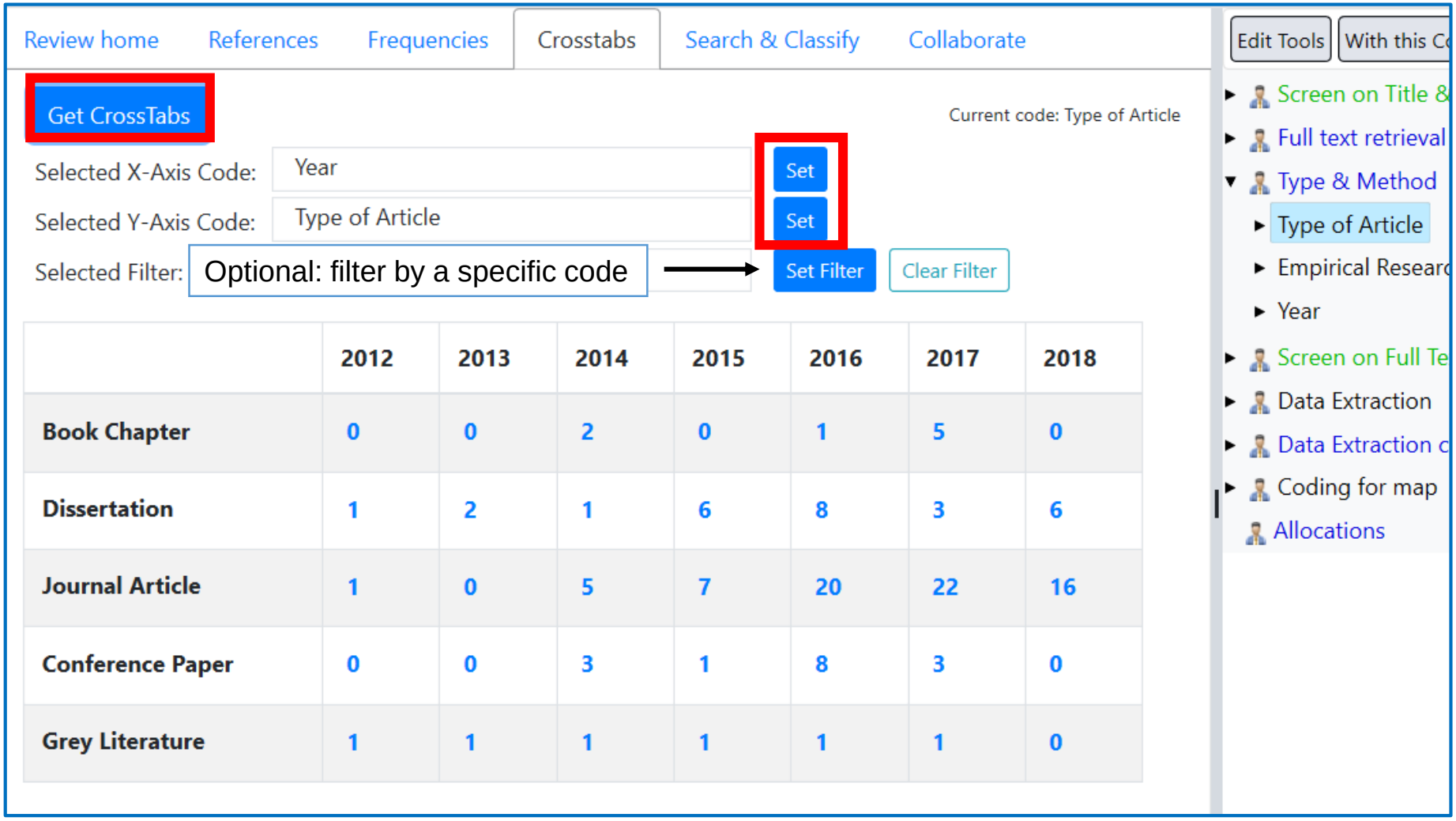
Frequency Report – ER Web



In the Frequencies tab, select the coding tool or parent code, click **Set** and then **Get frequencies.**

- Frequencies are only retrieved for one level of hierarchy.
- Clicking a blue number in the Count column will list those items.

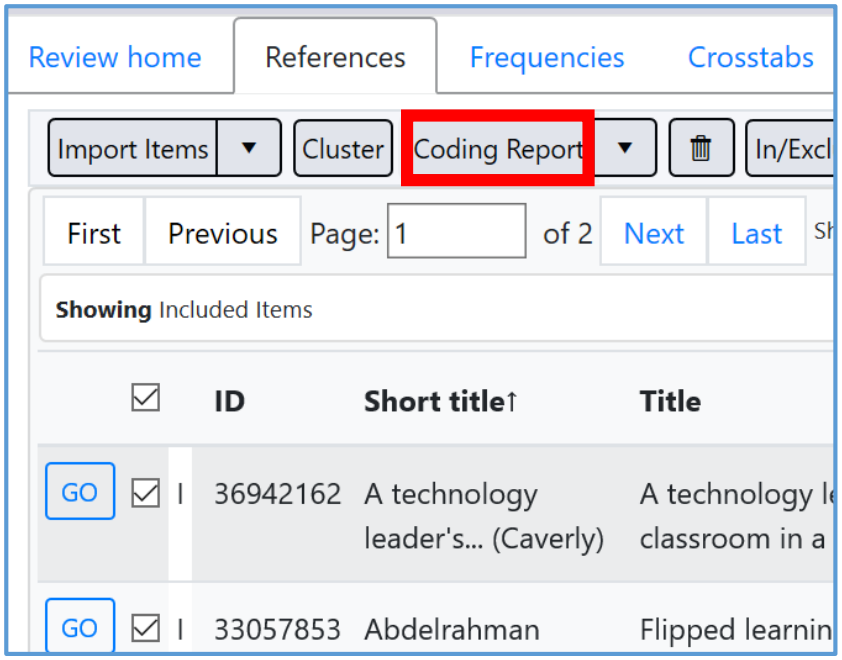
Crosstab Report – ER Web



	2012	2013	2014	2015	2016	2017	2018
Book Chapter	0	0	2	0	1	5	0
Dissertation	1	2	1	6	8	3	6
Journal Article	1	0	5	7	20	22	16
Conference Paper	0	0	3	1	8	3	0
Grey Literature	1	1	1	1	1	1	0

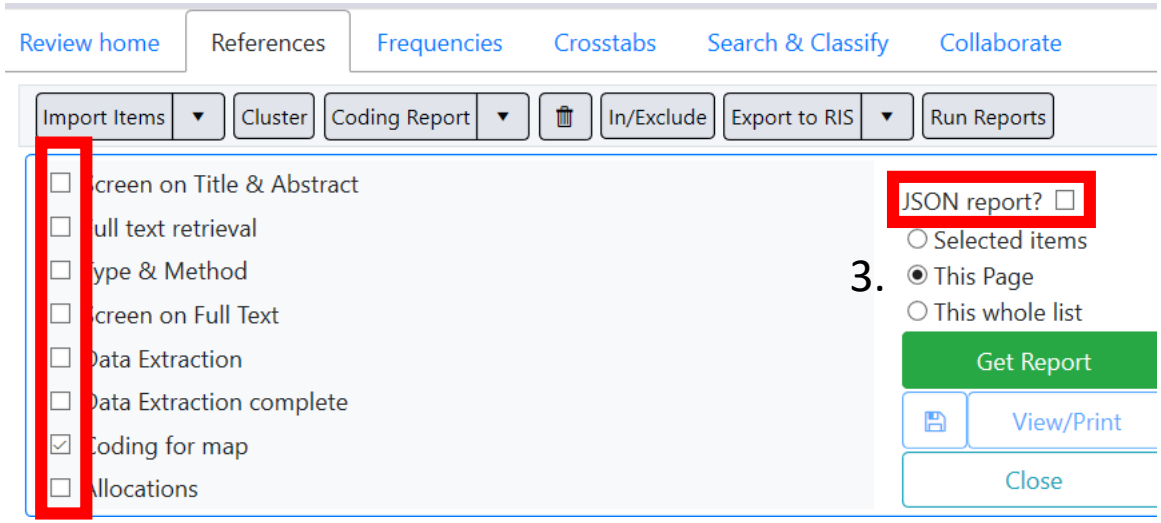
1. Choose a parent code for the X-axis and the Y-axis by selecting the code in the Codes panel and clicking **Set**.
2. Click on **Get Crosstabs**.

Coding Reports



Similar to a coding report in ER4.

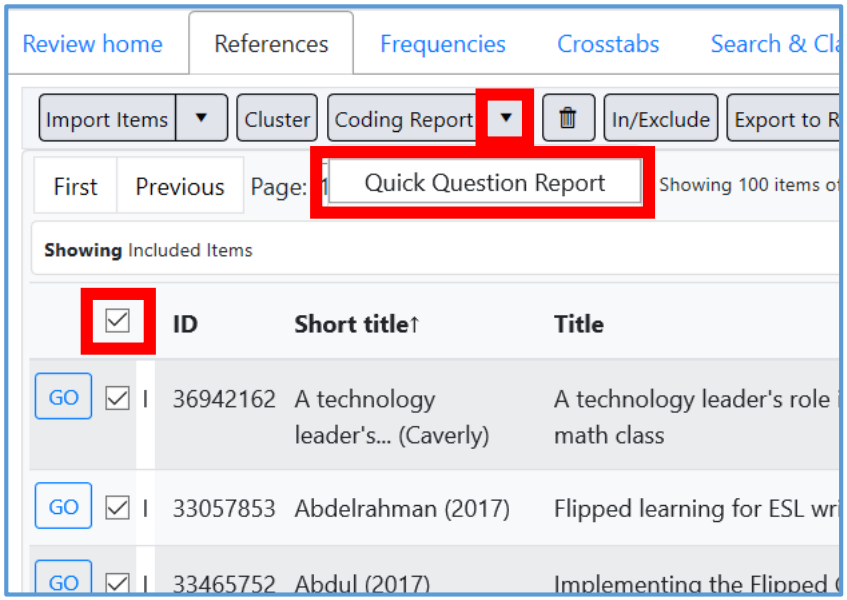
1. Click on **Coding Report**.
2. Choose which coding tools to include.
3. Choose which items to include.
4. Click the checkbox next to JSON report? to create a JSON report for an interactive evidence gap map.



5. Click **Get Report**.
6. **View/Print** opens report tab.
7. Click the blue save icon to save as a HTML file.

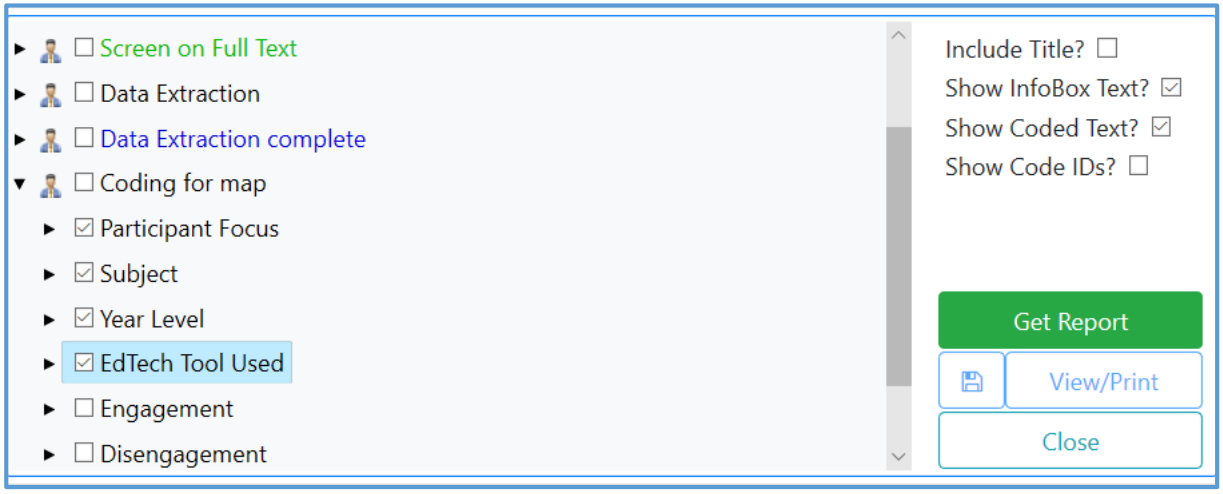
Video: https://youtu.be/iGXgpb4bwFg

Quick Question Reports – ER Web



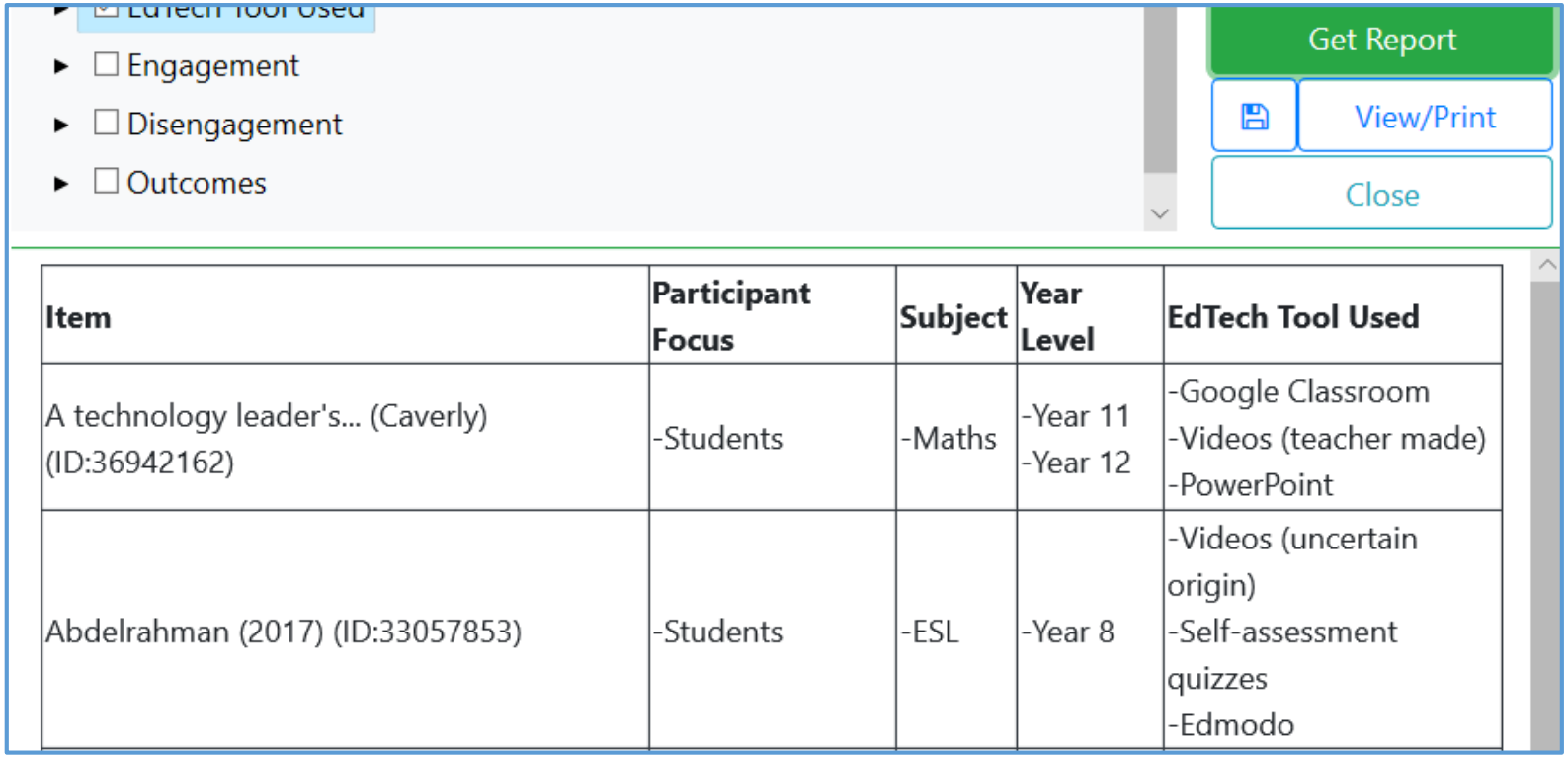
Similar to a configurable report in ER4.

1. Select the items to include.
2. Click the black arrow next to Coding Report.
3. Click on **Quick Question Report**.
4. Choose the parent/question code from any coding tool.



5. Choose whether to include InfoBox text and line-by-line PDF coding.
6. Click **Get Report**.
7. **View/Print** opens report tab.

Quick Question Reports – ER Web



Item	Participant Focus	Subject	Year Level	EdTech Tool Used
A technology leader's... (Caverly) (ID:36942162)	-Students	-Maths	-Year 11 -Year 12	-Google Classroom -Videos (teacher made) -PowerPoint
Abdelrahman (2017) (ID:33057853)	-Students	-ESL	-Year 8	-Videos (uncertain origin) -Self-assessment quizzes -Edmodo

Appears below after clicking on Get Report.

Clicking View/Print will open it in a new tab.

Save report as HTML and open in Excel or Word.

Item	Participant Focus	Subject	Year Level	EdTech Tool Used
A technology leader's... (Caverly) (ID:36942162)	-Students	-Maths	-Year 11 -Year 12	-Google Classroom -Videos (teacher made) -PowerPoint
Abdelrahman (2017) (ID:33057853)	-Students	-ESL	-Year 8	-Videos (uncertain origin) -Self-assessment quizzes -Edmodo
Abdul (2017) (ID:33465752)	-Students	-History	-Year 9	-Videos (uncertain origin) -Self-assessment quizzes
Al-Harbi (2016) (ID:33058203)	-Students	-ESL	-Unsure	-Edmodo -Videos (made by others)
Avery (2018) (ID:36942160)	-Students	-History -Biology	-Year 11	-Videos (uncertain origin) -Other LMS

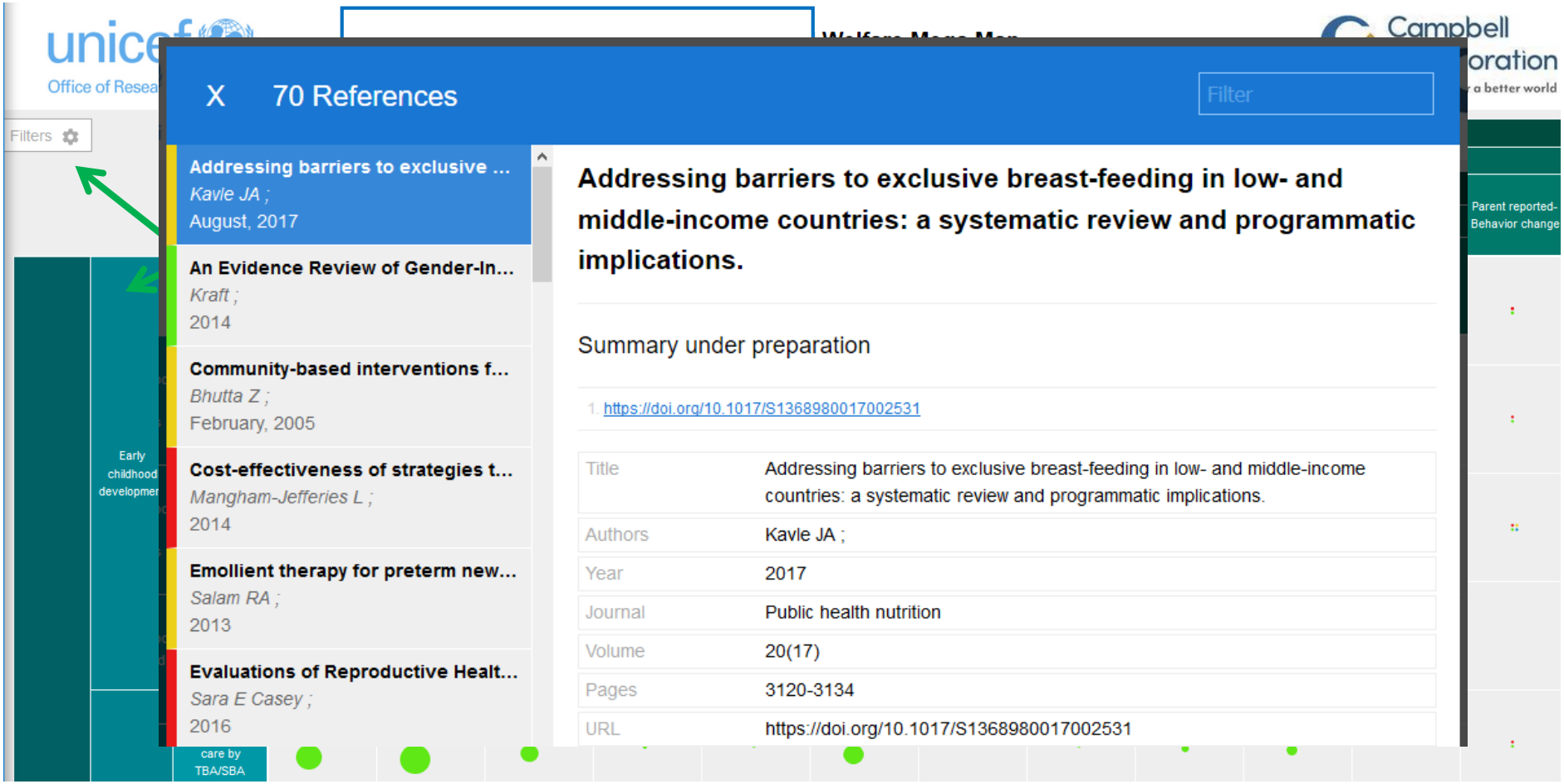
Webinar Topics

- ❑ ER admin and accessing help.
- ❑ Logging in and basic navigation of ER Web.
- ❑ Importing references.
- ❑ Managing duplicates.
- ❑ Adding and editing coding tools/codes.
- ❑ Creating coding assignments.
- ❑ Line-by-line PDF coding.
- ❑ Generating reports.
- ❑ Interactive Evidence Gap Maps.
- ❑ Any other questions?

YouTube: https://youtu.be/hAdXi0tiNa4

Interactive Evidence Gap Maps

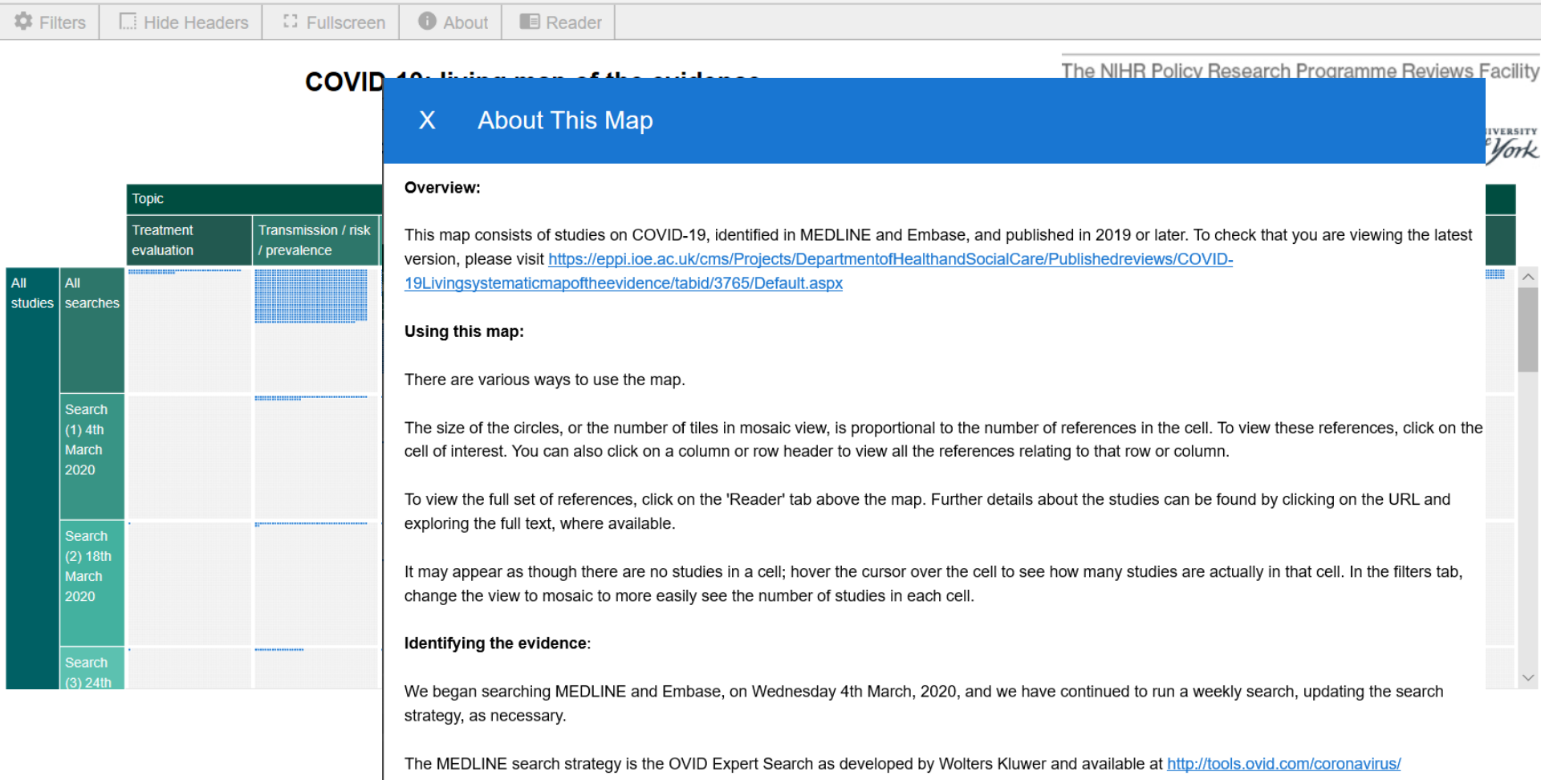
Enables the exploration of a body of evidence by "mapping" the collected literature against 3 or more dimensions.



Is an interactive tool that uses EPPI-Reviewer data.

COVID-19 Living Evidence Map

http://eppi.ioe.ac.uk/COVID19_MAP/covid_map_v15.html



How to create an interactive EGM: https://youtu.be/hAdXi0tiNa4

Further Support

If you need any help at all, *we are here for you*!

- EPPISupport@ucl.ac.uk
- Support forum: https://eppi.ioe.ac.uk/cms/Default.aspx?tabid=2932
- FAQ: https://eppi.ioe.ac.uk/cms/Default.aspx?tabid=3384
- YouTube: https://www.youtube.com/user/EPPIReviewer4

Questions / comments?