INSTITUTE OF EDUCATION

EPPI-Reviewer Web Demonstration

Online Introductory Webinar
2 July 2021

Dr Melissa Bond

EPPI-Reviewer Support Officer

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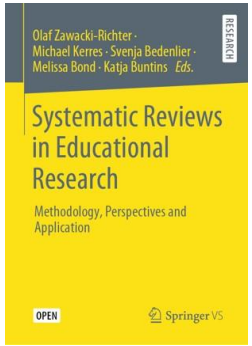
@misc_nerd @EPPIReviewer @EPPIReviewer4

Presenter Background

Dr Melissa Bond

- Former high school teacher in SA (10 years)
- Research Associate (3 years, Uni Oldenburg)
- PhD, 2020
- EPPI-Reviewer Support Officer (since Feb 2020)
- Systematic & mapping reviews
  - COVID-19 studies on teaching and learning in higher education
  - COVID-19 studies on teaching and learning in K-12
  - 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
  - Formative feedback in online higher education courses
  - 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.
- Applying the Exclusion flag / Officially excluding items
- Generating reports and creating PRISMA diagrams.
- EPPI-Visualiser and EPPI-Mapper
- Any other questions?

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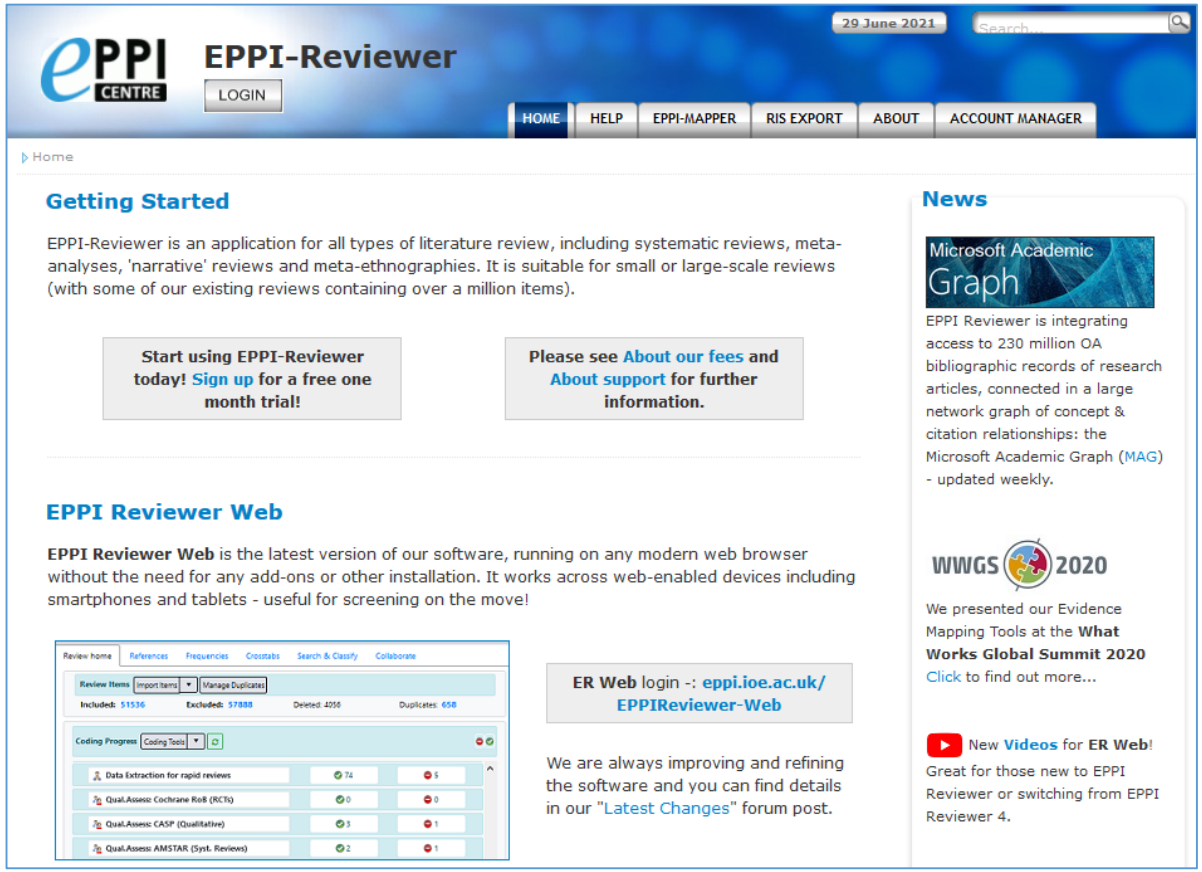
- ❑ Any other questions?

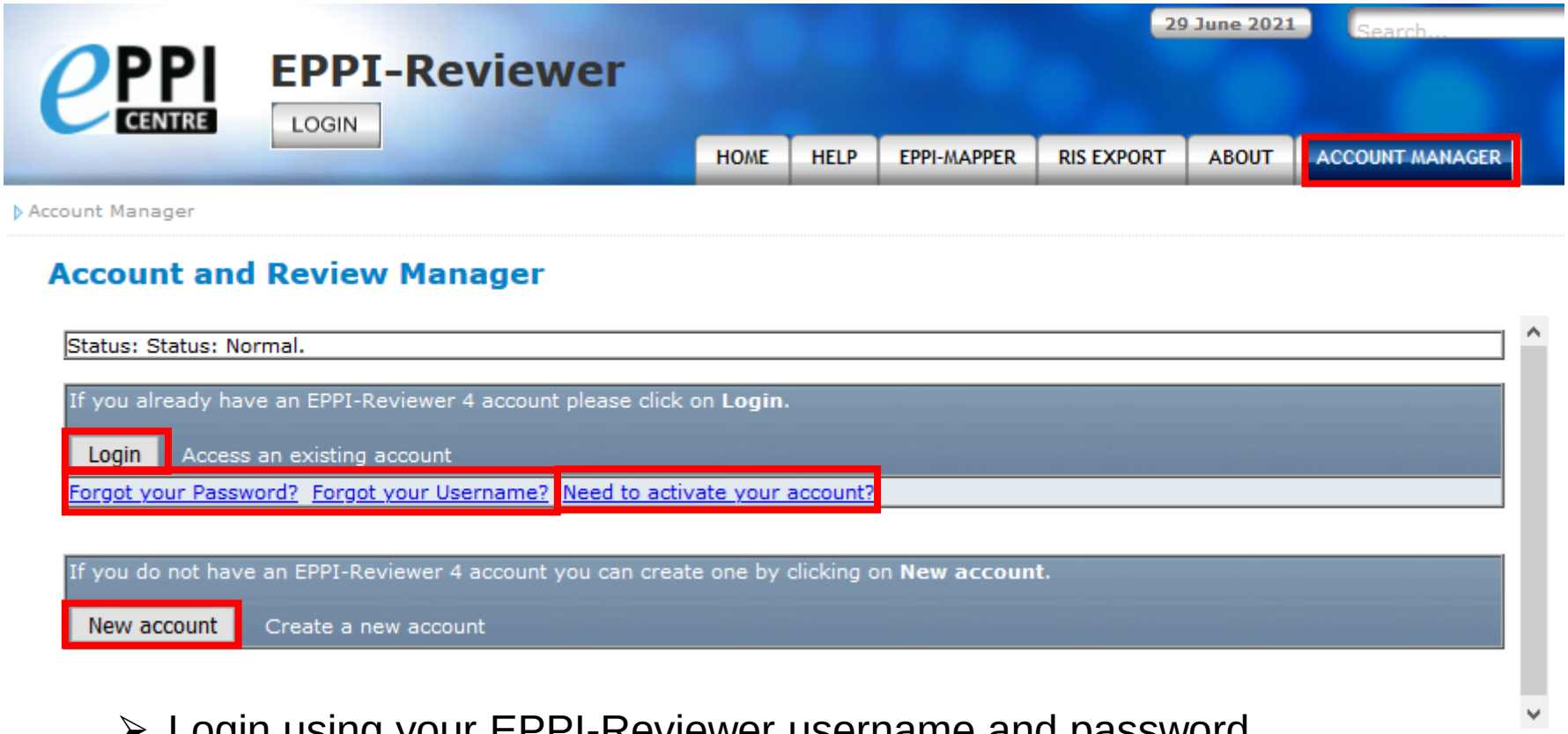
EPPI-Reviewer Gateway

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



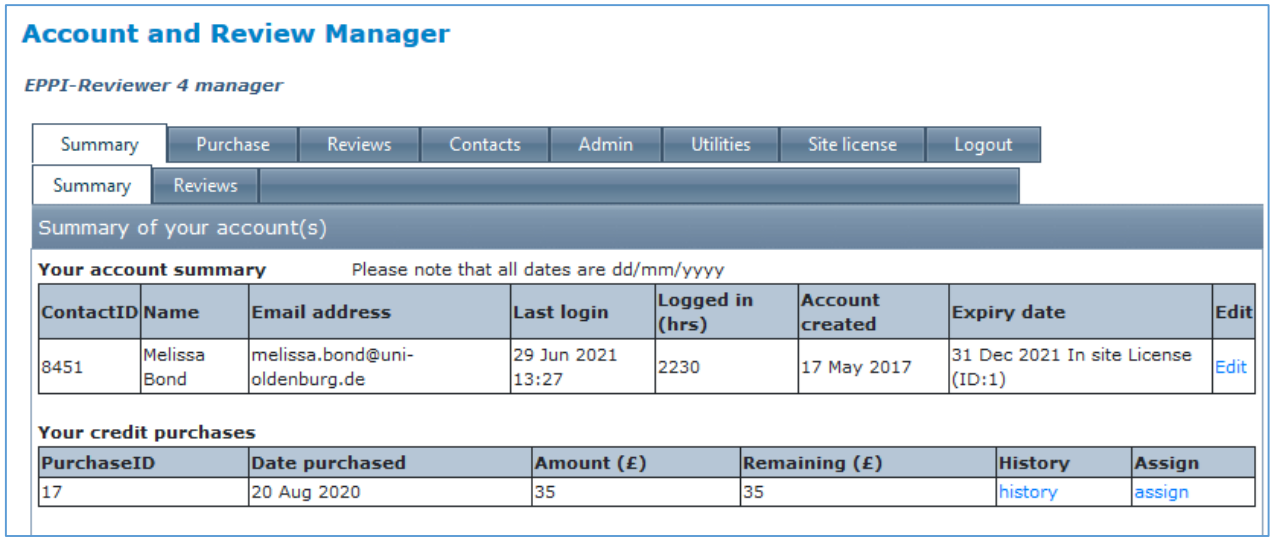
- Access latest information about ER and features
- Support forums
- User manual, FAQ
- Instructional videos
- Export to RIS facility
- Access to the ER review and account manager

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



Account and Review Manager

EPPI-Reviewer 4 manager

Summary | Purchase | Reviews | Contacts | Admin | Utilities | Site license | Logout

Summary | Reviews

Summary of your account(s)

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

ContactID	Name	Email address	Last login	Logged in (hrs)	Account created	Expiry date	Edit
8451	Melissa Bond	melissa.bond@uni-oldenburg.de	29 Jun 2021 13:27	2230	17 May 2017	31 Dec 2021 In site License (ID:1)	Edit

Your credit purchases

PurchaseID	Date purchased	Amount (£)	Remaining (£)	History	Assign
17	20 Aug 2020	35	35	history	assign

Account and Review Manager

EPPI-Reviewer 4 manager

Summary | Purchase | Reviews | Contacts | Admin | Utilities | Site license | Logout

Summary | Reviews

Summary of your reviews

Shareable reviews you have purchased or have administrative rights to

1 2

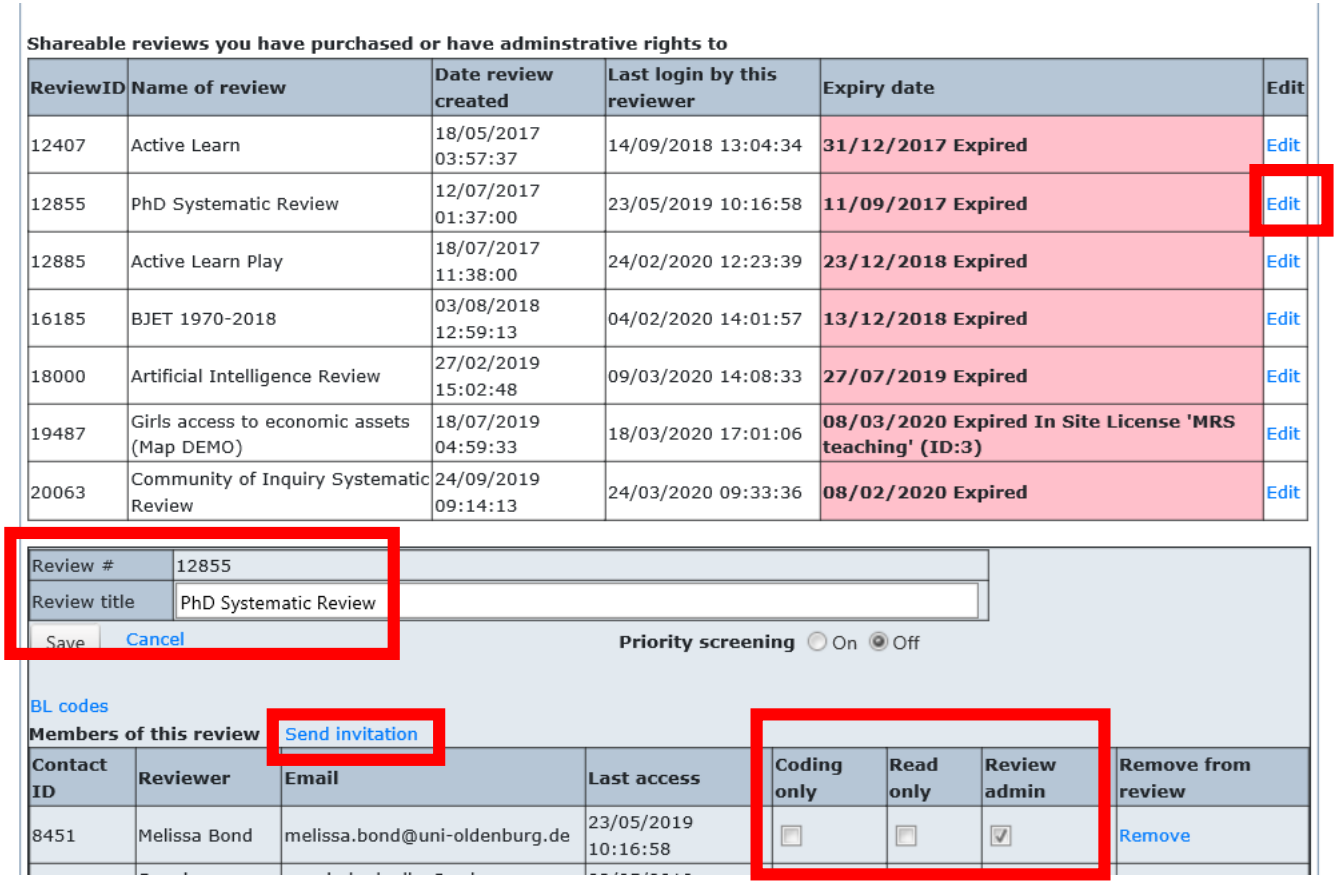
ReviewID	Name of review	Date review created	Last login by this reviewer	Expiry date	Edit
27630	DT_HE	24 Apr 2021	28 Jun 2021 23:04	26 Nov 2021	Edit
25134	FI V3	21 Oct 2020	12 Mar 2021 12:15	**15 Mar 2021 Expired**	Edit
24998	NB-ECEC 2018/2019	12 Oct 2020	25 Jun 2021 12:14	10 Oct 2021 In Site License 'Knowledge Centre for Education - Removable Reviews' (ID:86)	Edit
24656	COVID-19 and schools	17 Sep 2020	29 Jun 2021 13:53	30 Jun 2021	Edit
24034	COVID19 and Higher Education Systematic Review	23 Jul 2020	25 Jun 2021 14:41	31 Jul 2021	Edit

Once logged in, you can:

- See and edit your account details, including credit purchases.
- 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

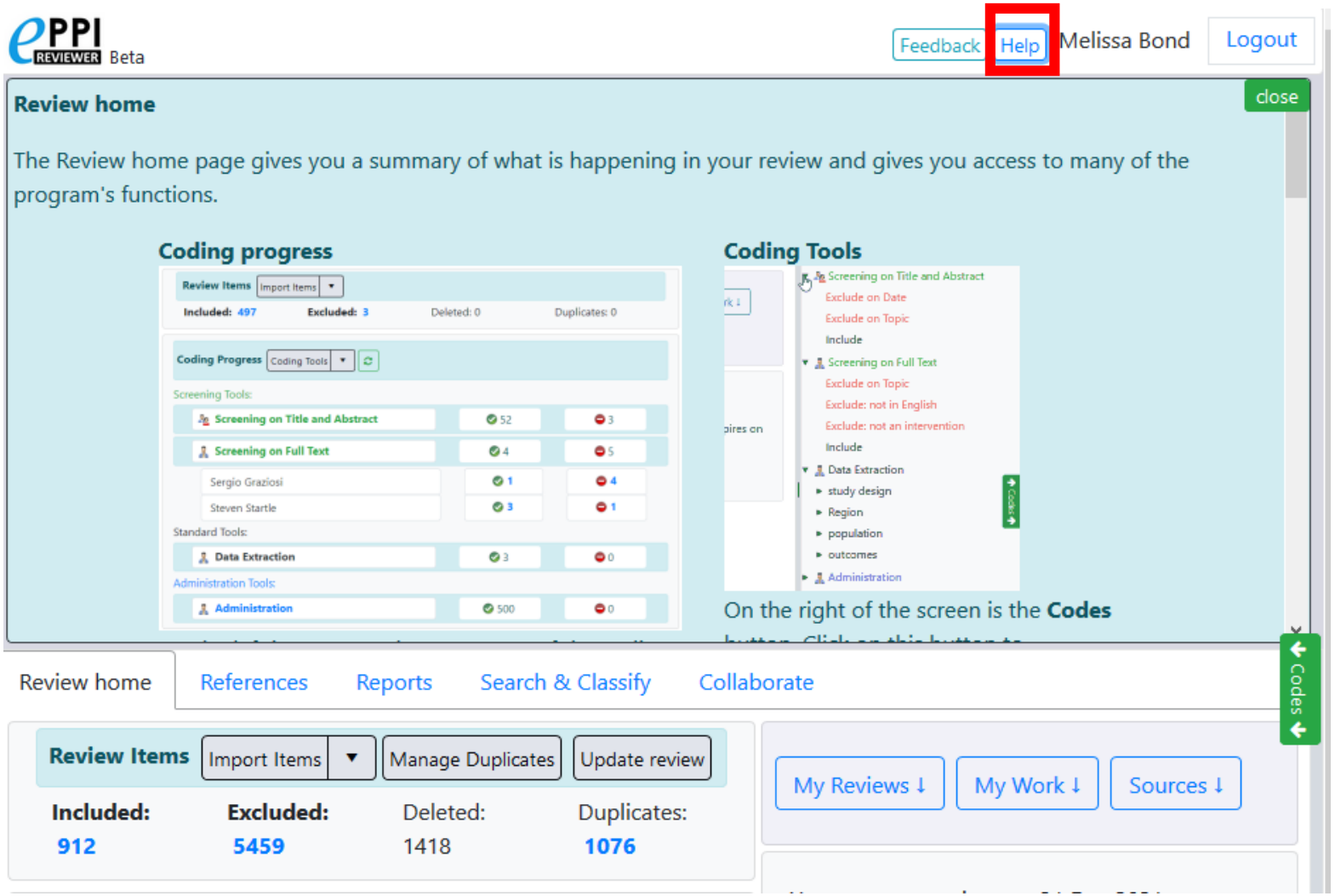
- Edit your review's name.
- Invite others into your shareable review.
- Set roles for other users (if permissions allow)

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

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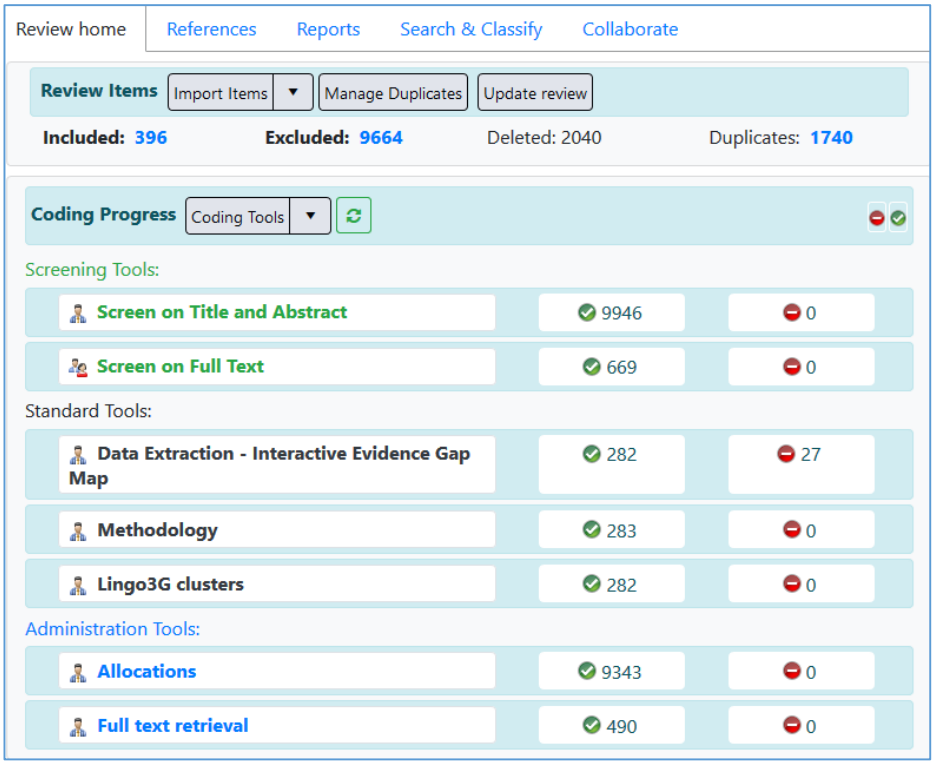
Setting up a typical review in ER Web video: https://youtu.be/UV3AIXQy1JI

EPPI-Reviewer Web

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

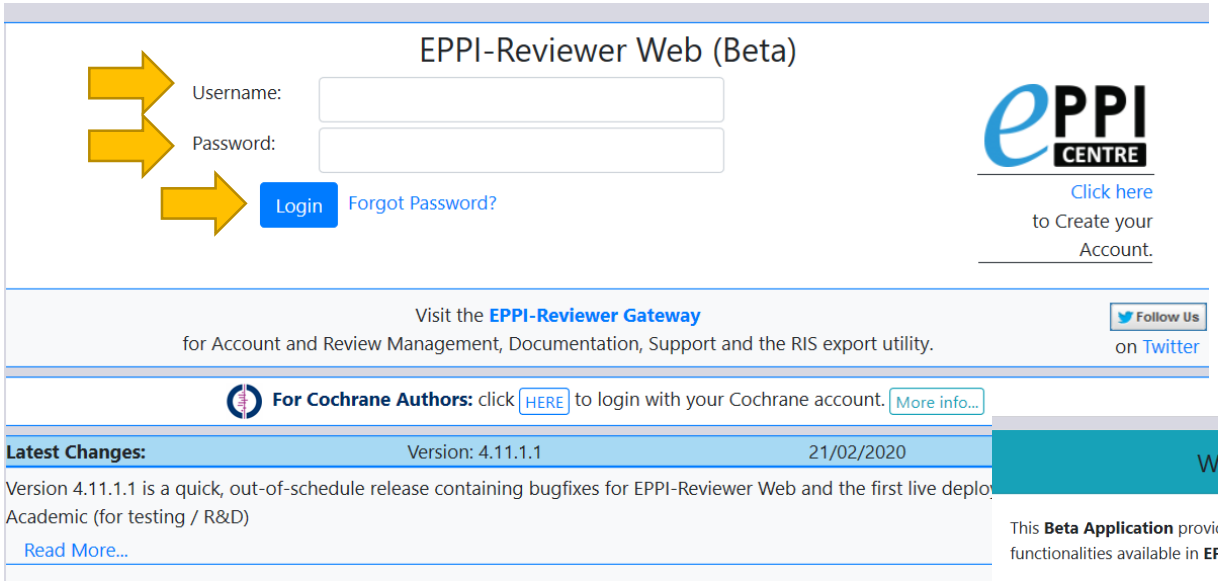
- Works with modern browsers (Firefox, Safari, Chrome).
- Works on web-enabled devices, e.g. smartphones and tablets.
- Uses the same data as EPPI-Reviewer 4.



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

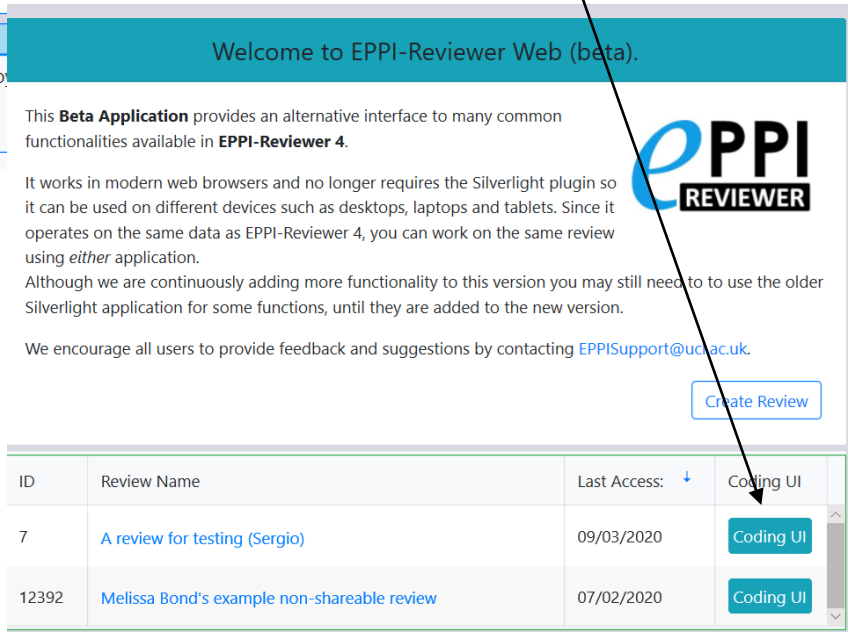
Logging into EPPI-Reviewer Web

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



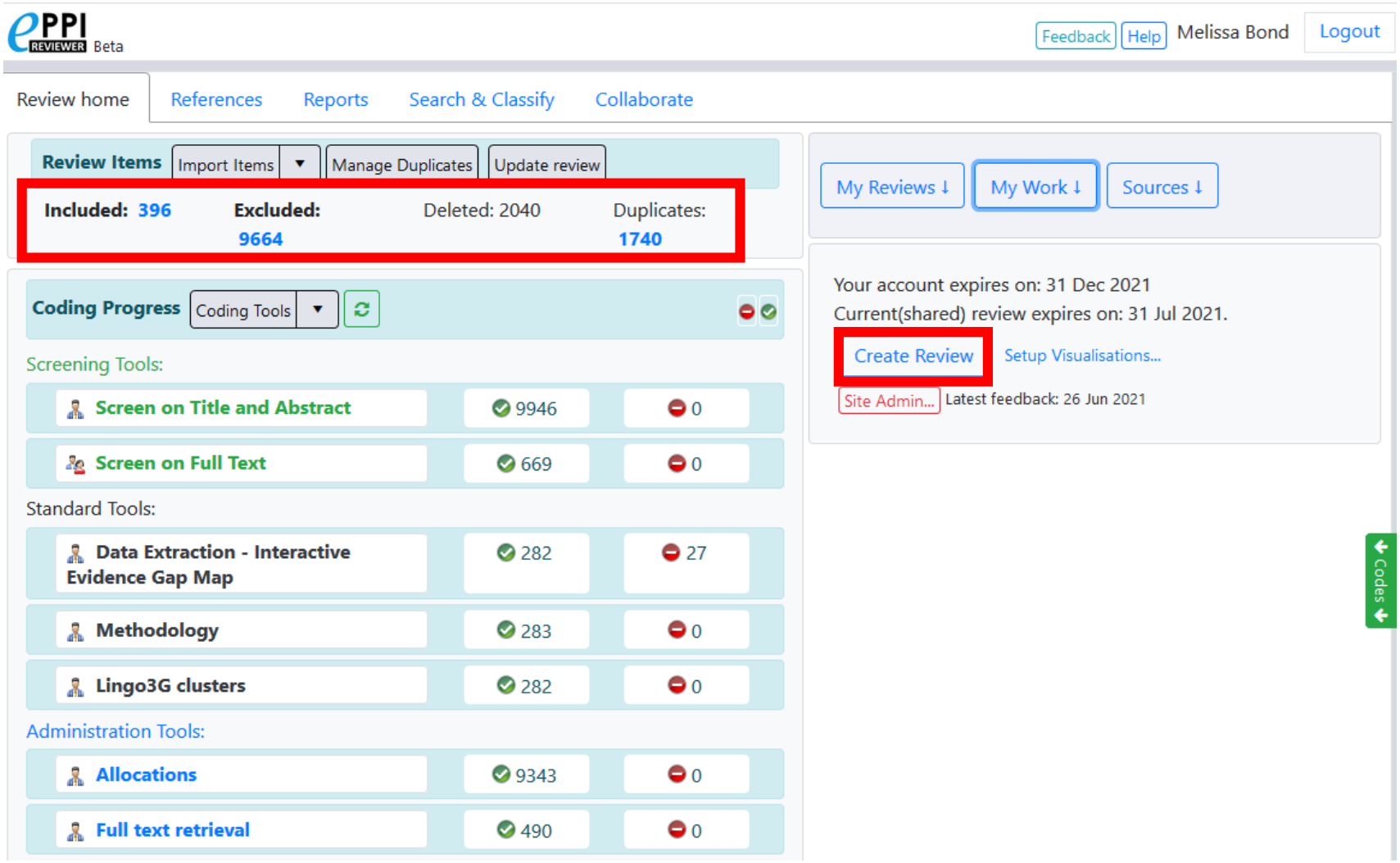
HELPFUL TIP:

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'.

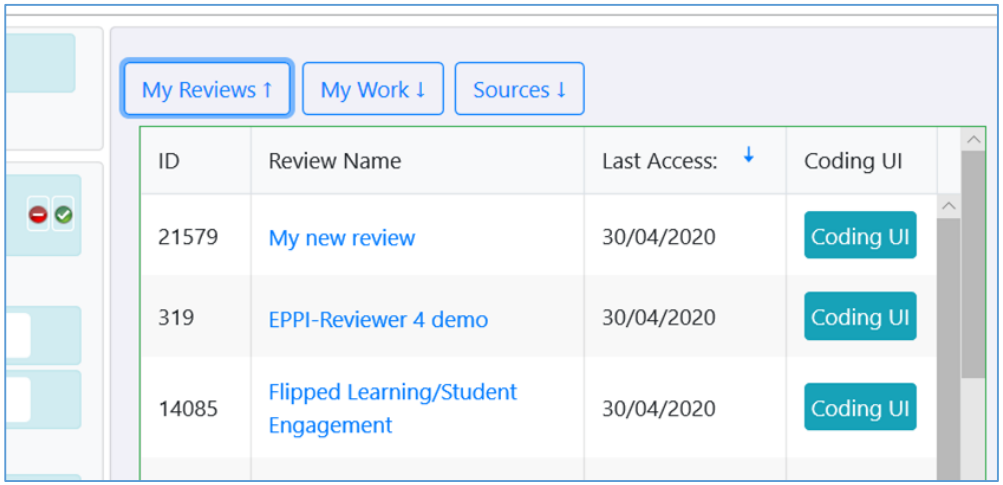
EPPI-Reviewer Web – Home Screen



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

EPPI-Reviewer Web – Home Screen

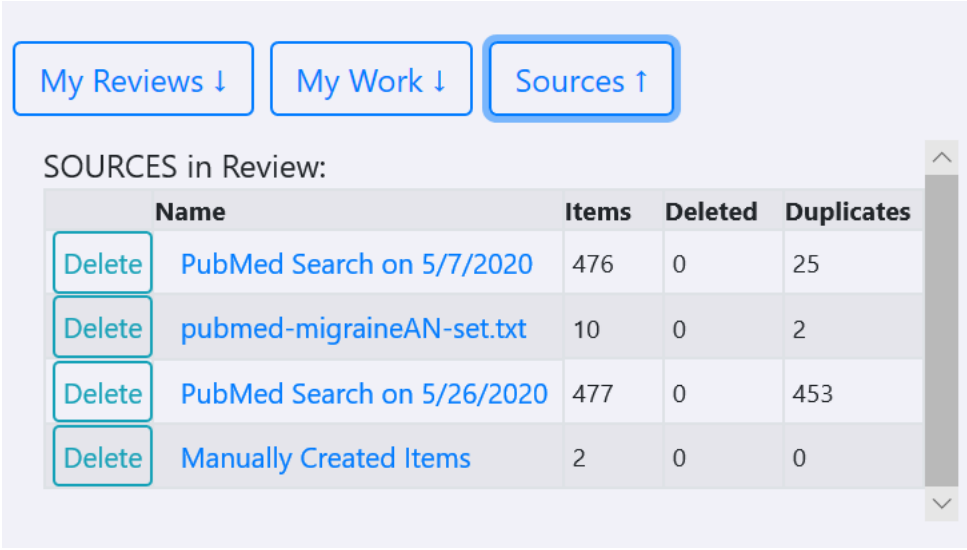
My Reviews panel



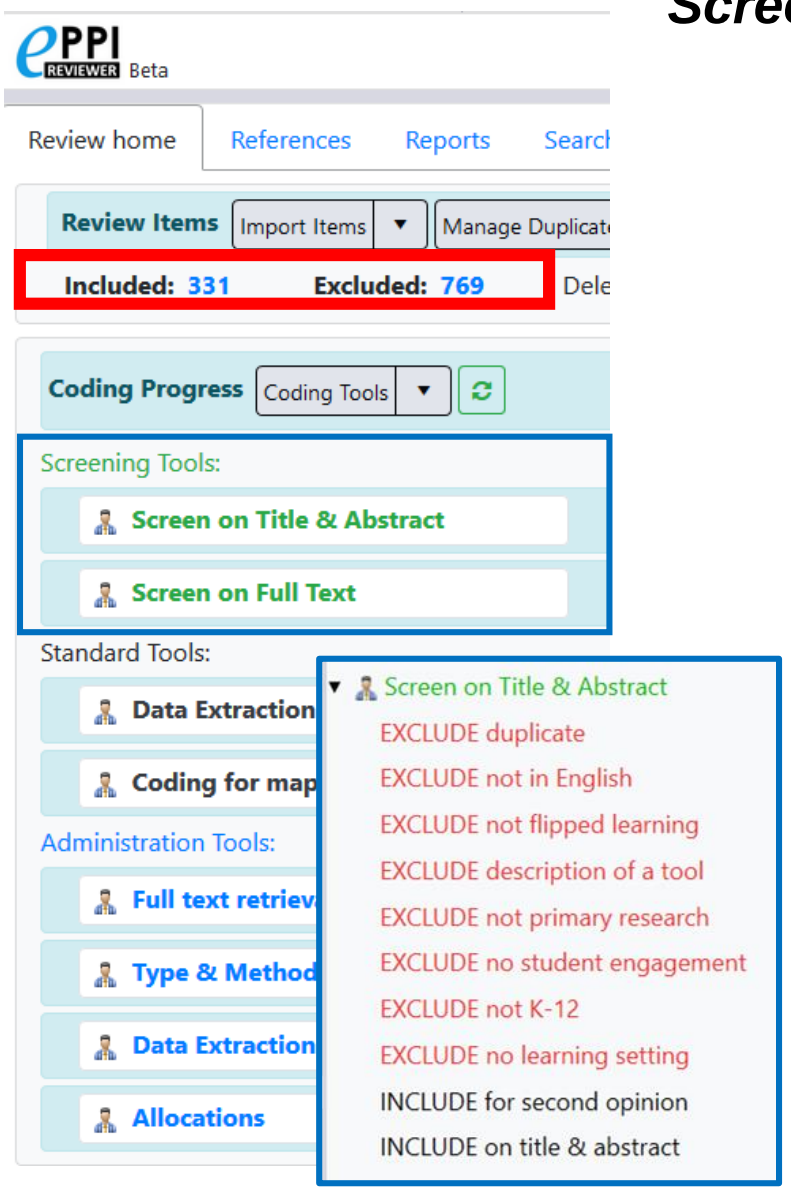
- Lists the reviews you have access to.
- ➢ Click on a review name to switch to that review.
- ➢ Click on 'Coding UI' to go to a coding only view.

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.

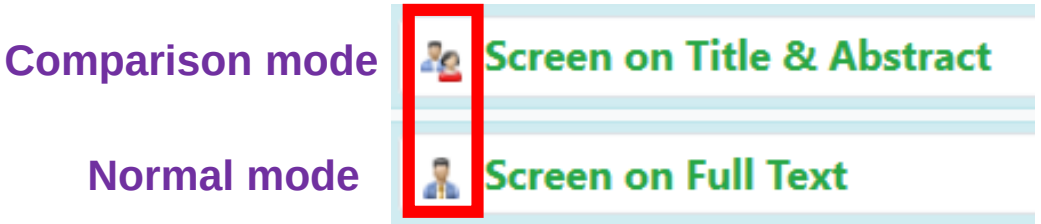


Coding Tool Types



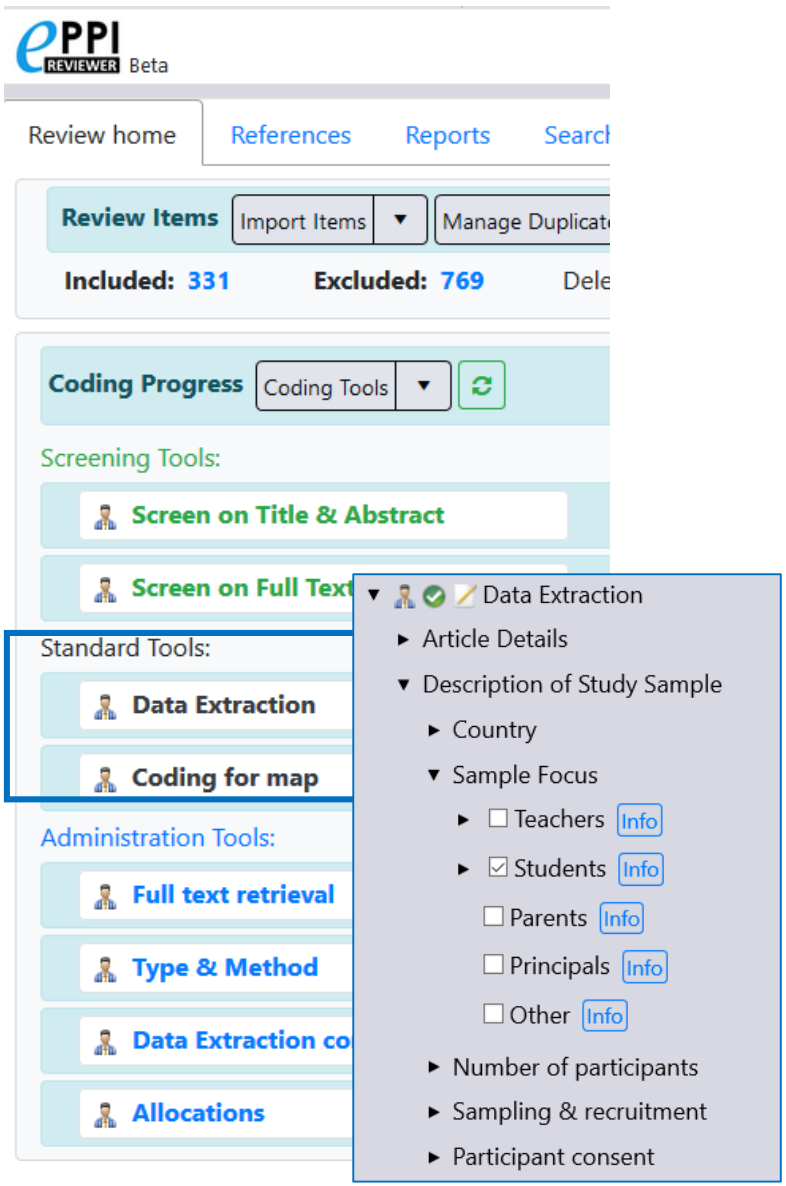
Screening tools

- Displayed in green.
- Allow 2 types of codes:
  - ➢ Include
  - ➢ Exclude
- Allows include v exclude comparisons.
- Can be in normal or comparison (double coding) data entry mode.



- Can only have one level of hierarchy.
  - ➢ Enables easier production of frequency reports and reconciliation.

Coding Tool Types

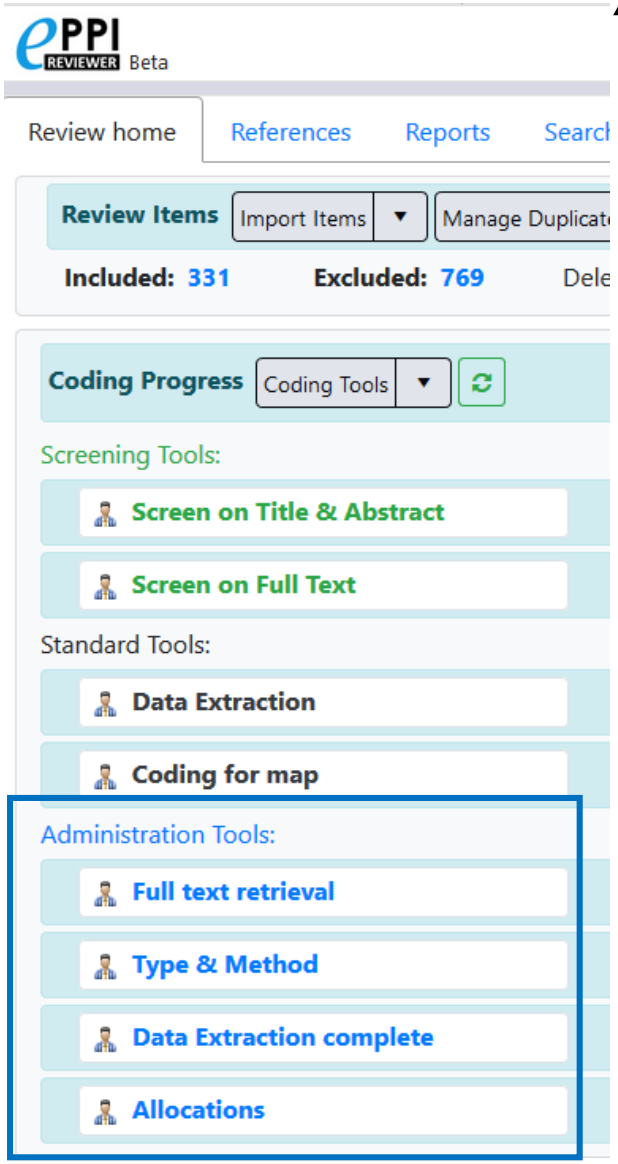


Standard tools

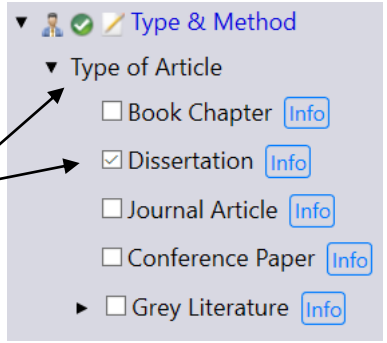
- Displayed in black.
- Allow all code types except include and exclude.
- Can be in normal or comparison (double coding) data entry mode.
- Used for coding that is more involved than screening, such as keywording or data extraction.
- Can have multiple levels of hierarchy.
- Multiple code types supported, e.g. checkable code, outcome code.

Coding Tool Types

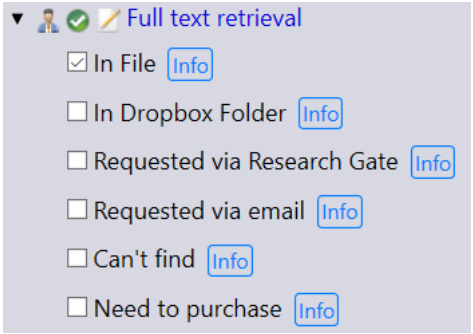
Administration tools



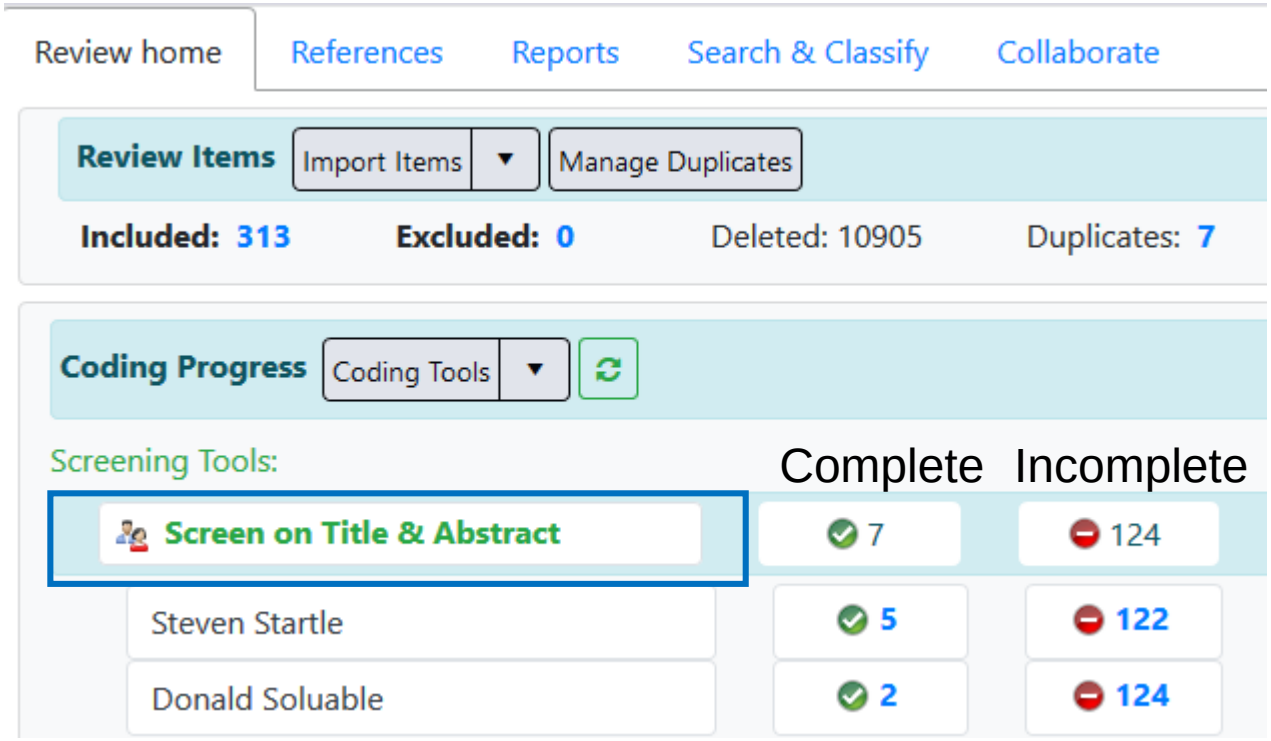
- Displayed in blue.
- Allow 2 types of codes:
  - Selectable
  - Non-selectable



- Can only be in normal data entry mode.
- Can have multiple levels of hierarchy.
- Used for activities such as:
  - Full text retrieval
  - Allocations (groups)
  - Report sets

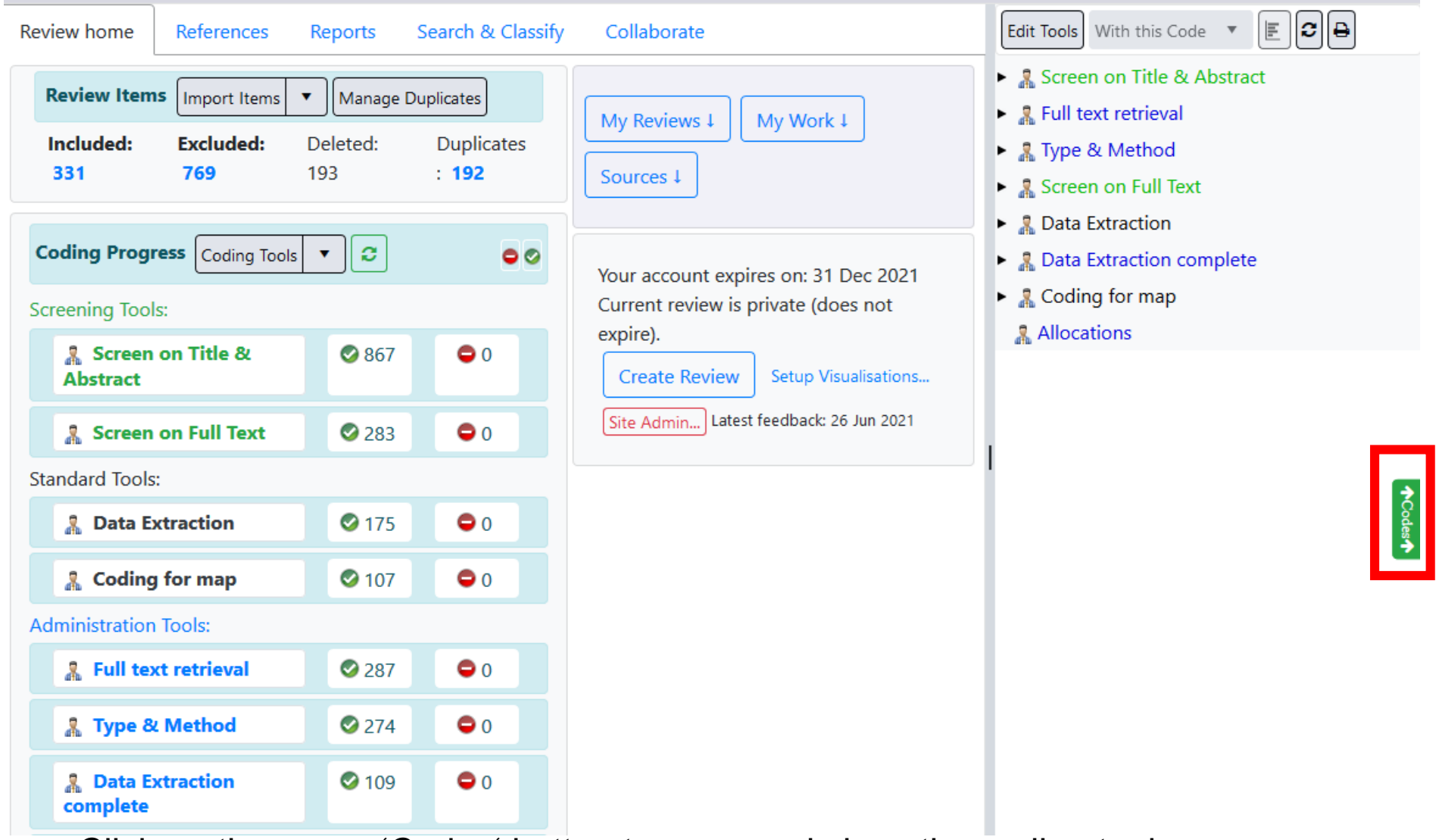


EPPI-Reviewer Web – Home Screen



- 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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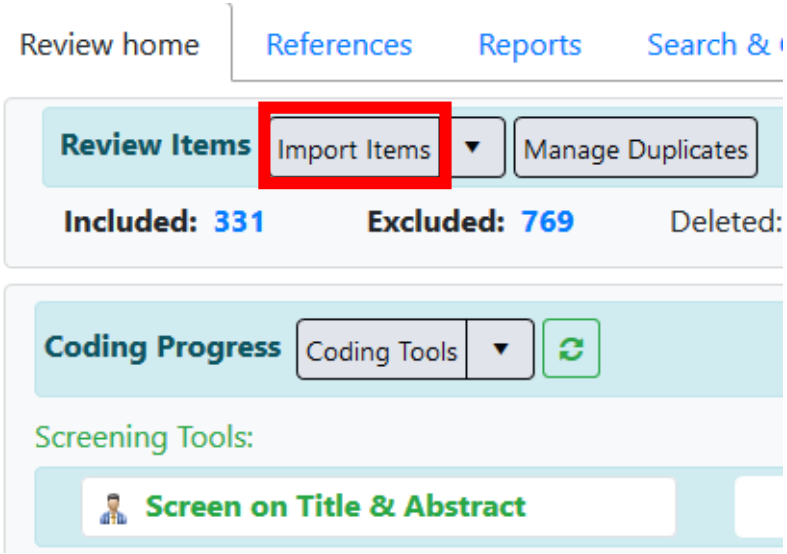
- Any other questions?

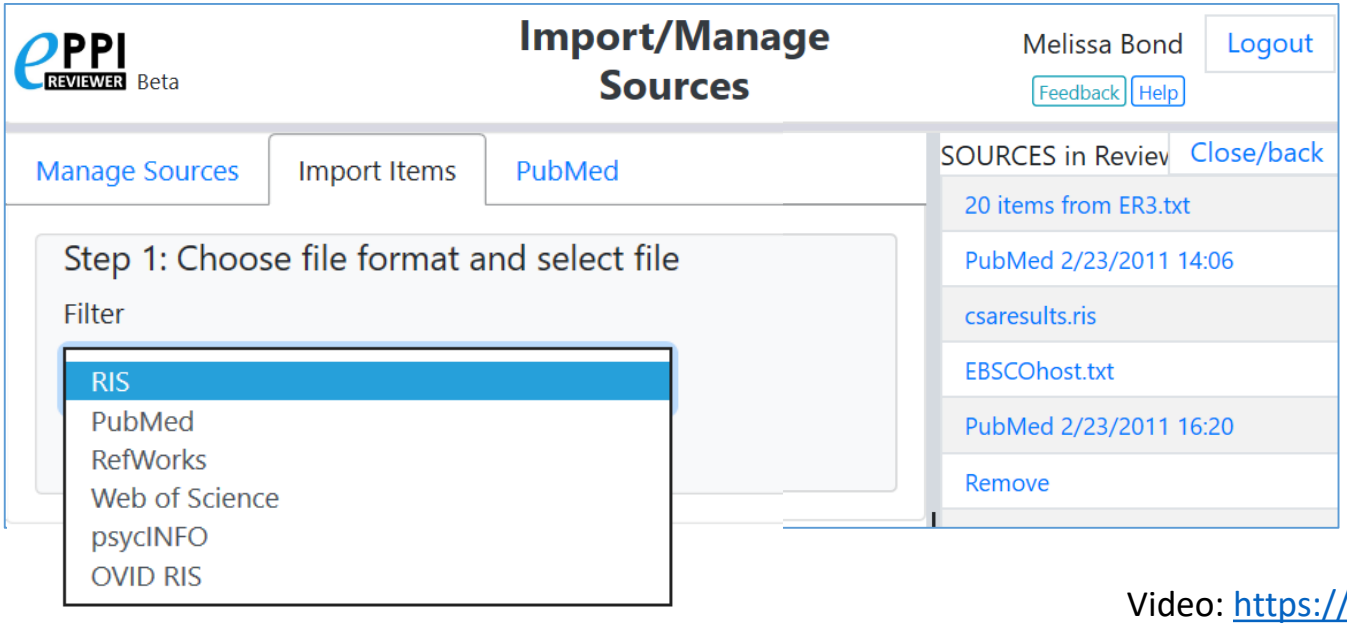
YouTube: https://youtu.be/Emkuq5H_FB0

Importing references



Review home tab

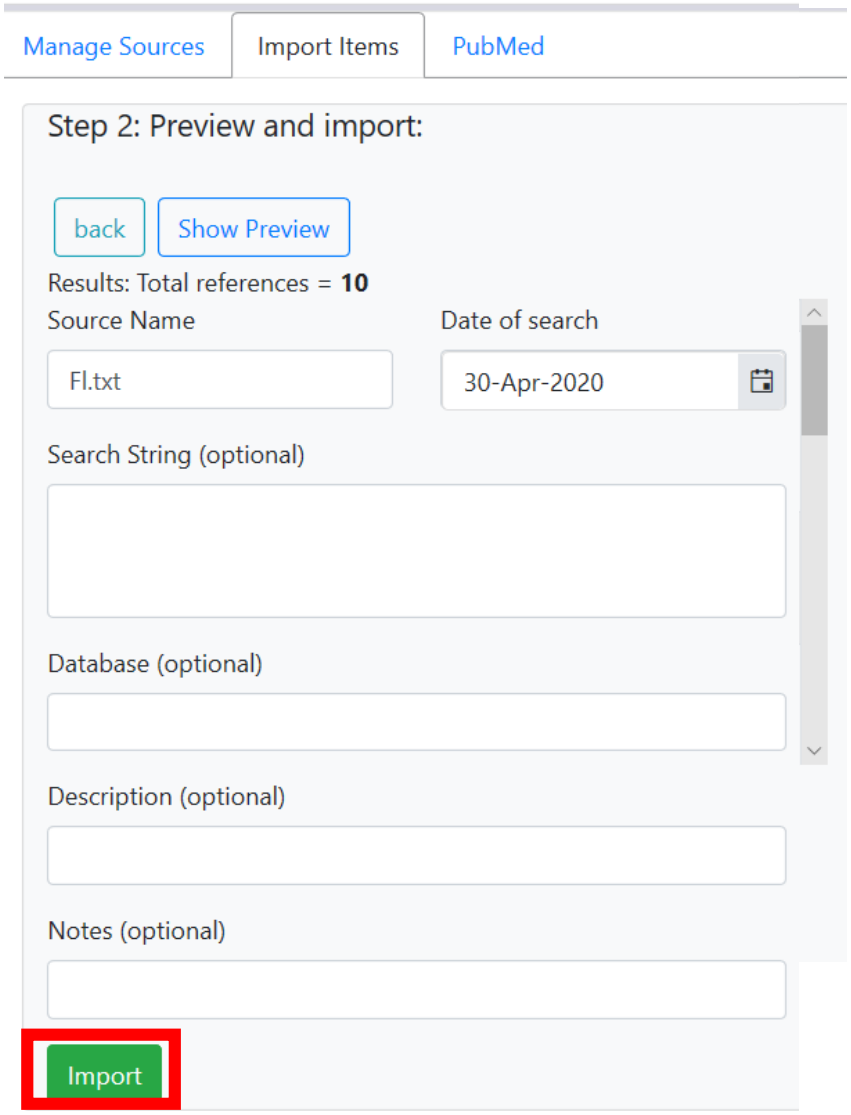
- Click on the **Import items** button
- The Import/Manage Sources page will be displayed.



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

Video: https://youtu.be/Emkuq5H_FB0

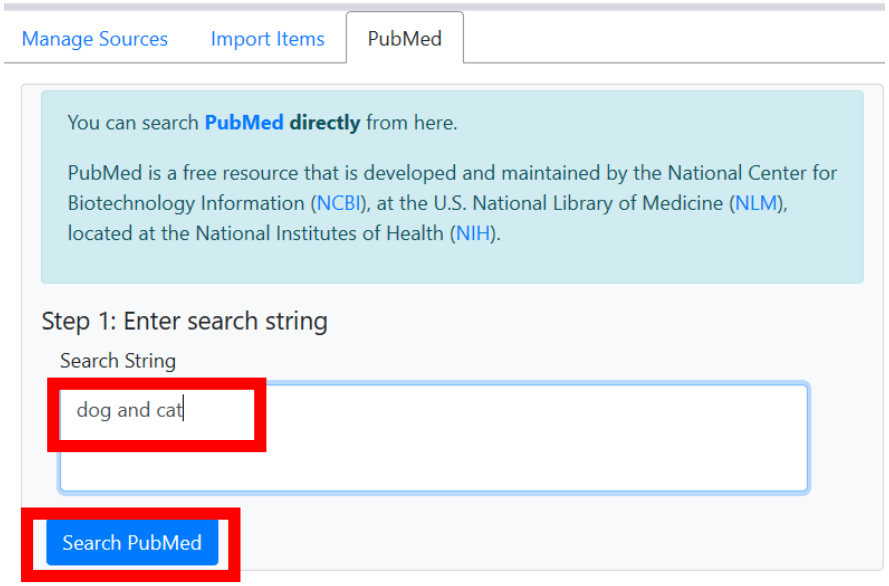
Importing references

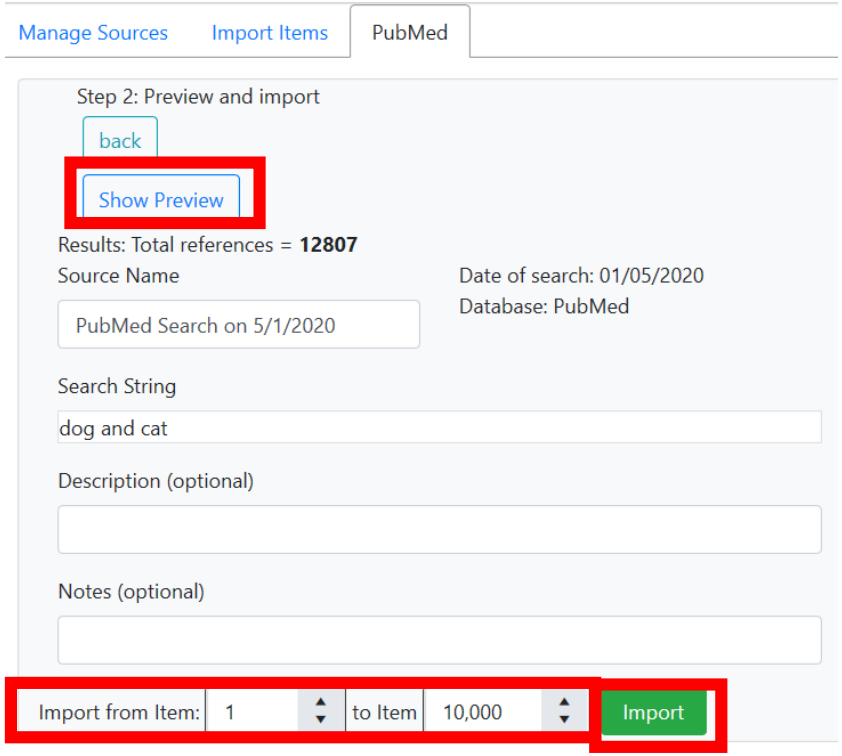


- Number of items to import will be displayed.
- Enter search details if desired, including string, database and date of the search.
- Click on the **Show Preview** button to see items for importing.
- Check to see if they appear as you would expect.
- Click **Hide Preview** to collapse.
- Click on **Import**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

Video: https://youtu.be/Emkuq5H_FB0

Importing references from PubMed

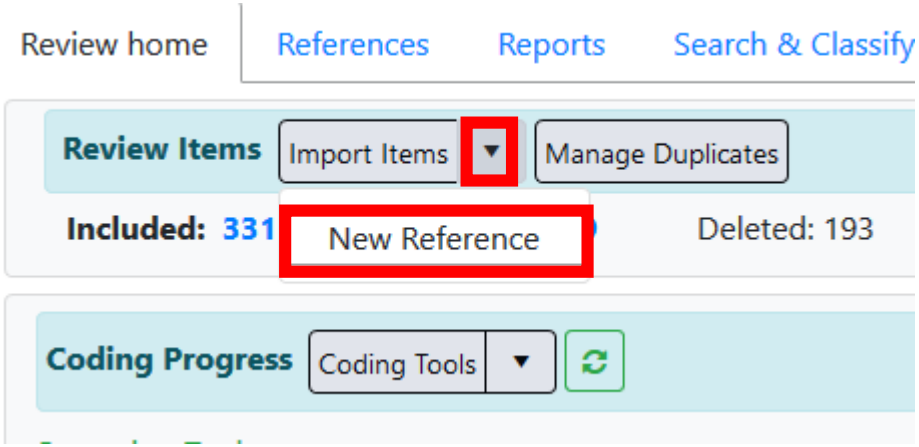




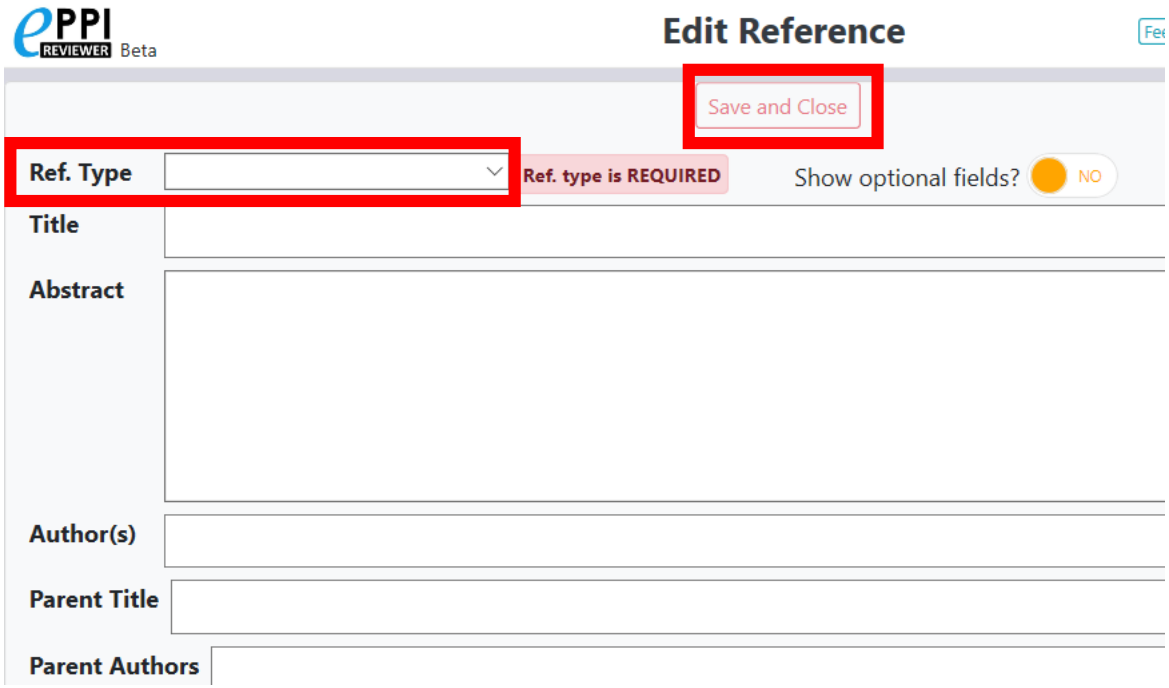
- Click on **PubMed** tab.
- Type in your search terms.
- Click **Search PubMed** and the items will be listed.
- Preview items and set the number to import (not too many!)
- Click **Import** to bring the items into your review.

Video: https://youtu.be/Emkuq5H_FB0

Manually creating an item

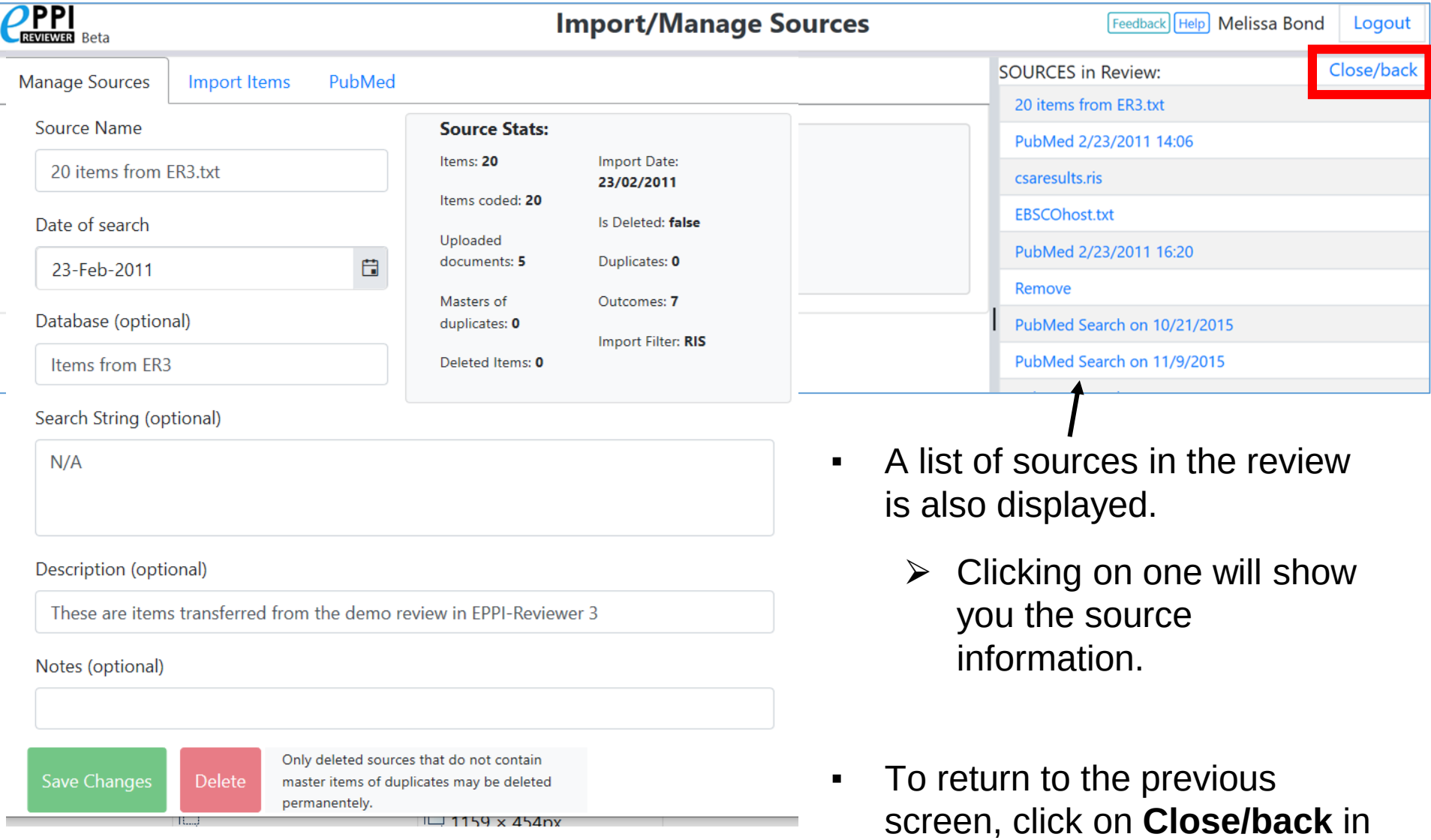


- Review home tab.
- Click on the **black arrow** next to Import Items.
- Click on **New Reference**.



- 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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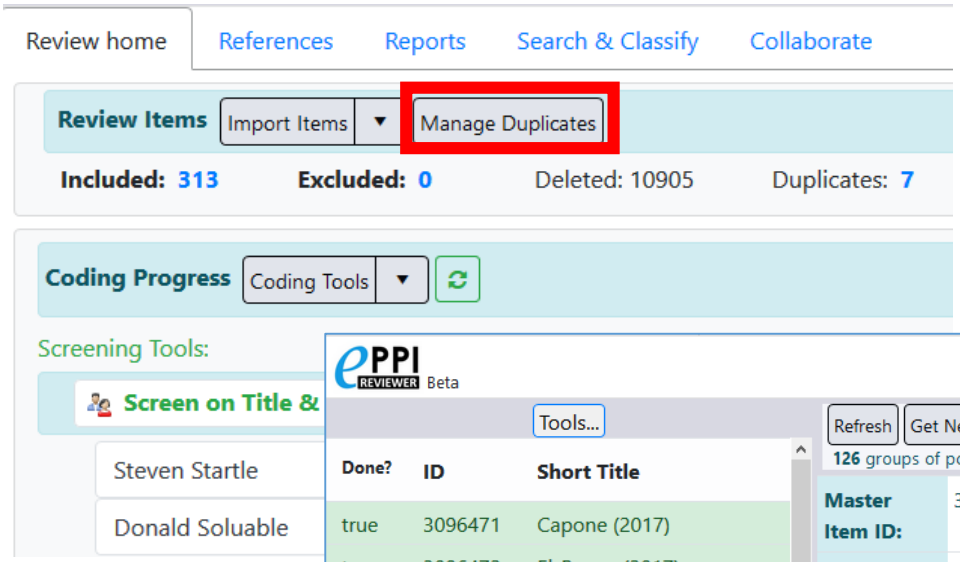
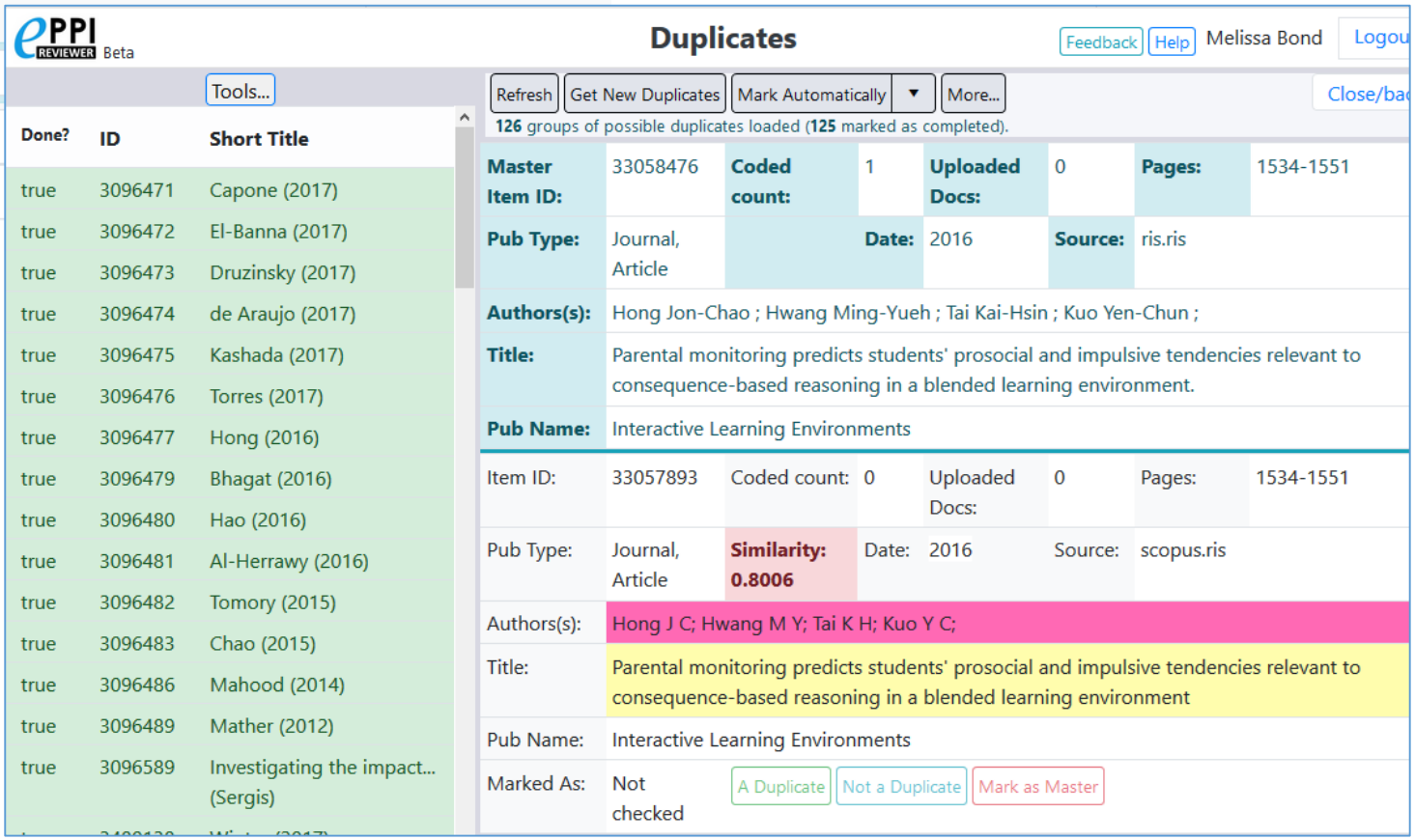
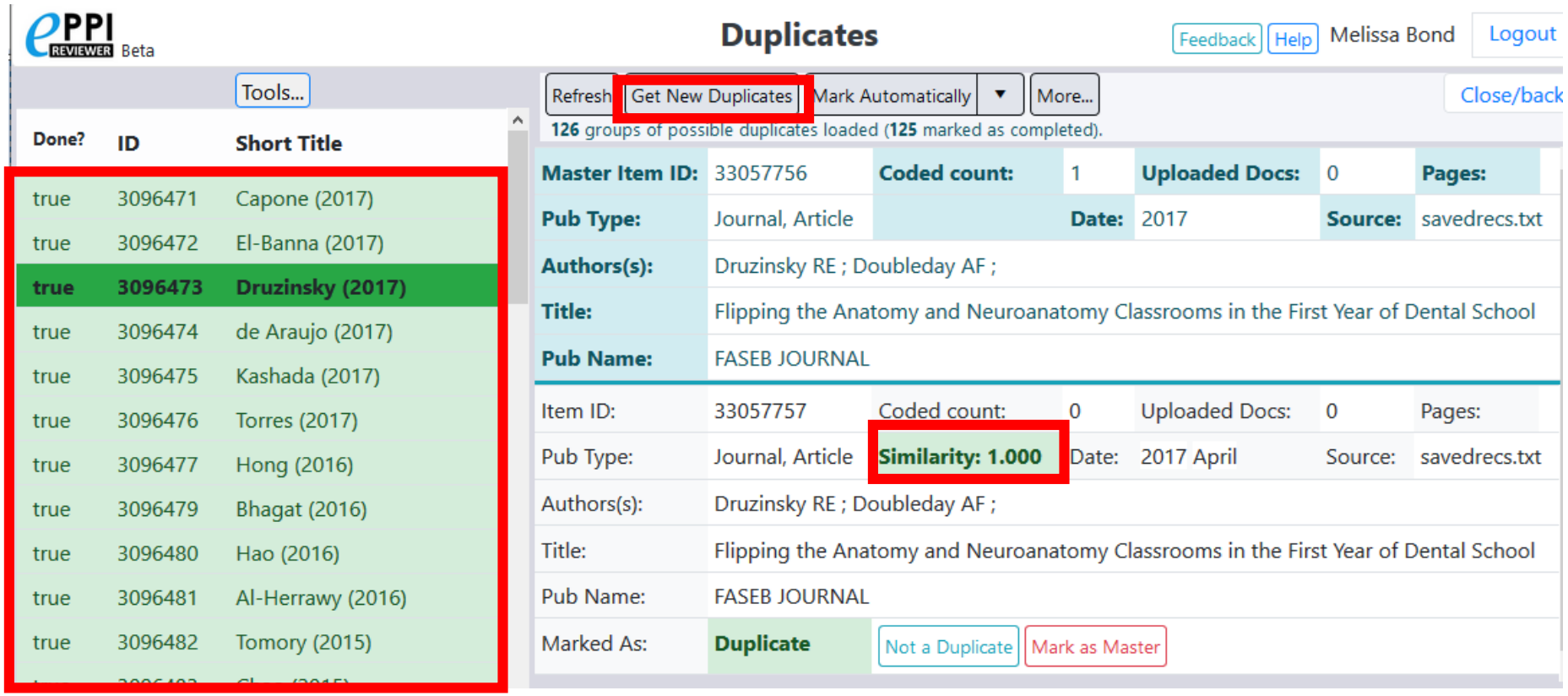
Managing duplicates – ER Web



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



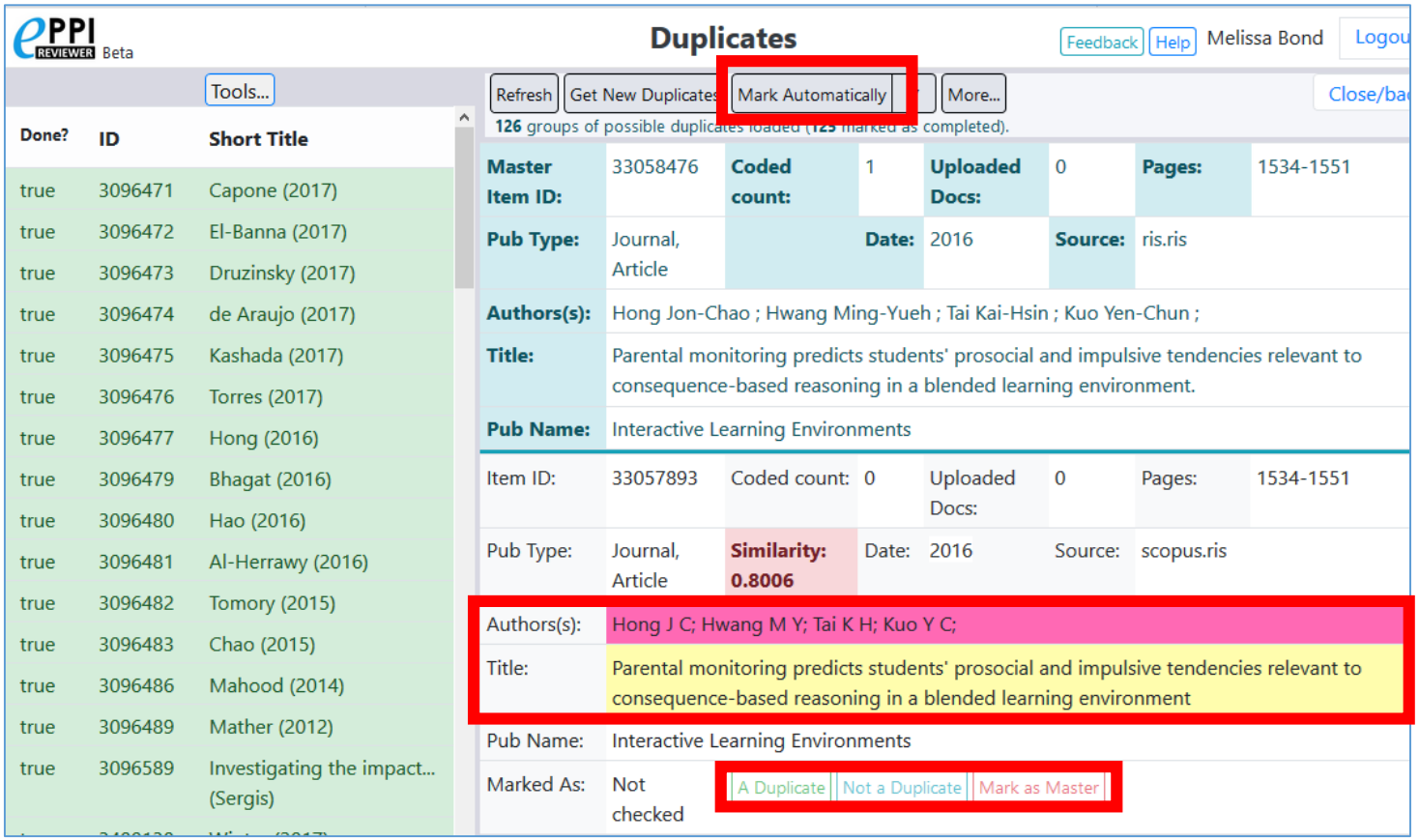
Managing duplicates – ER Web



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



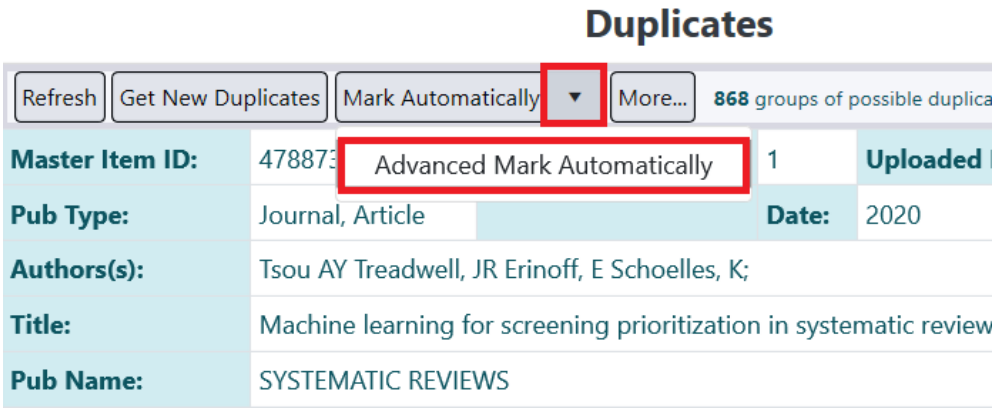
Mark Automatically will mark all items that have a similarity score of 1.00 as a duplicate. Complete groups are checked off.

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

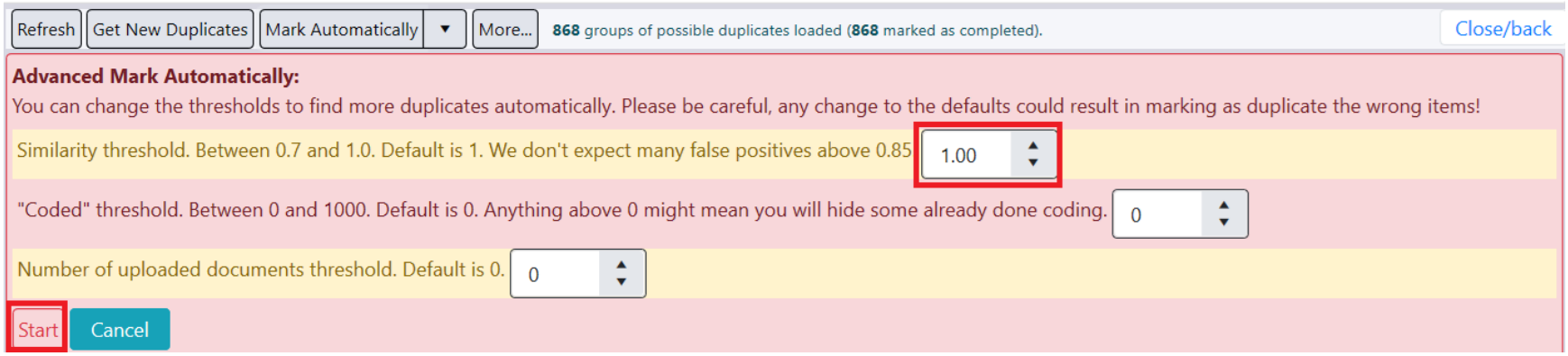
Managing duplicates – ER Web

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

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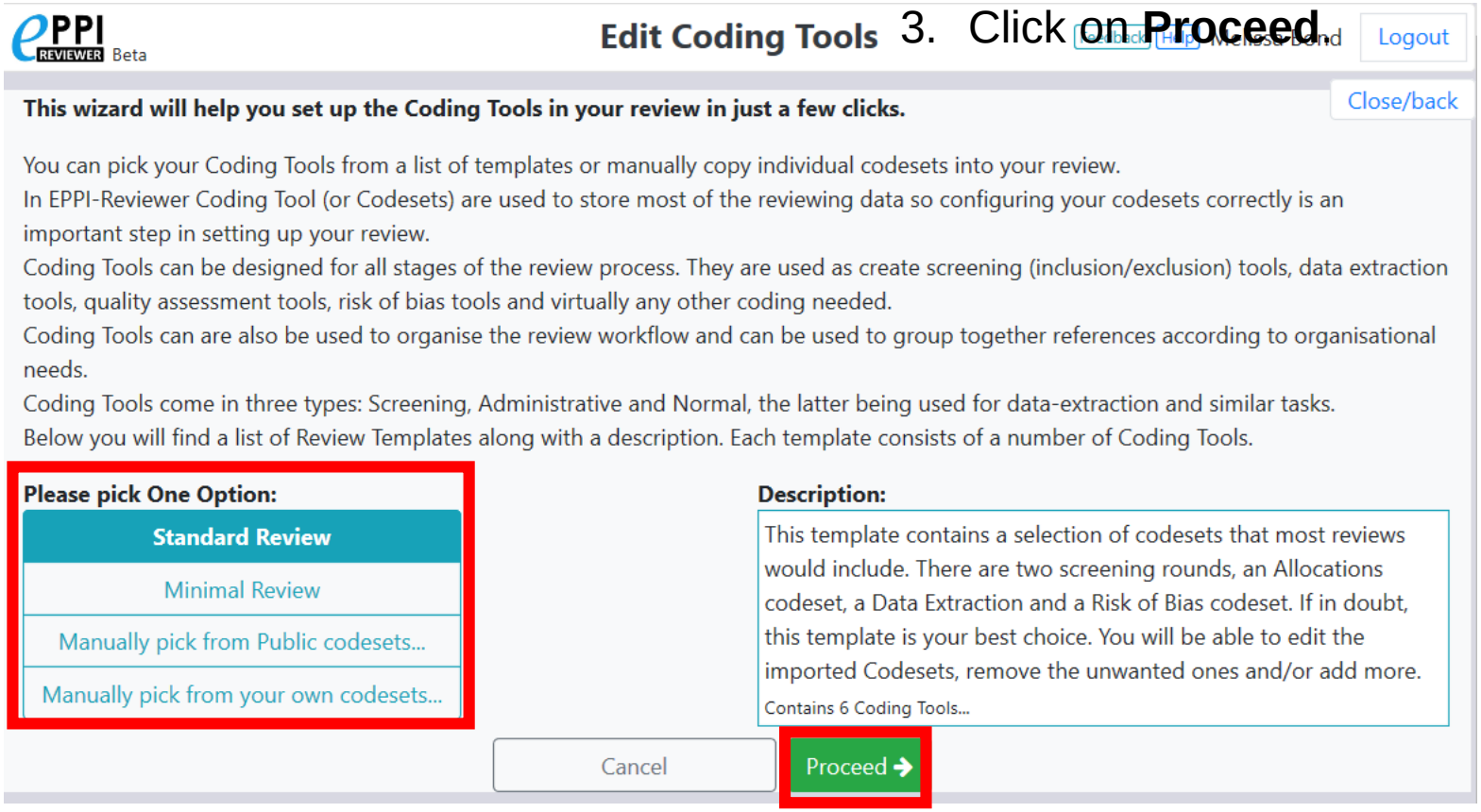
- Any other questions?

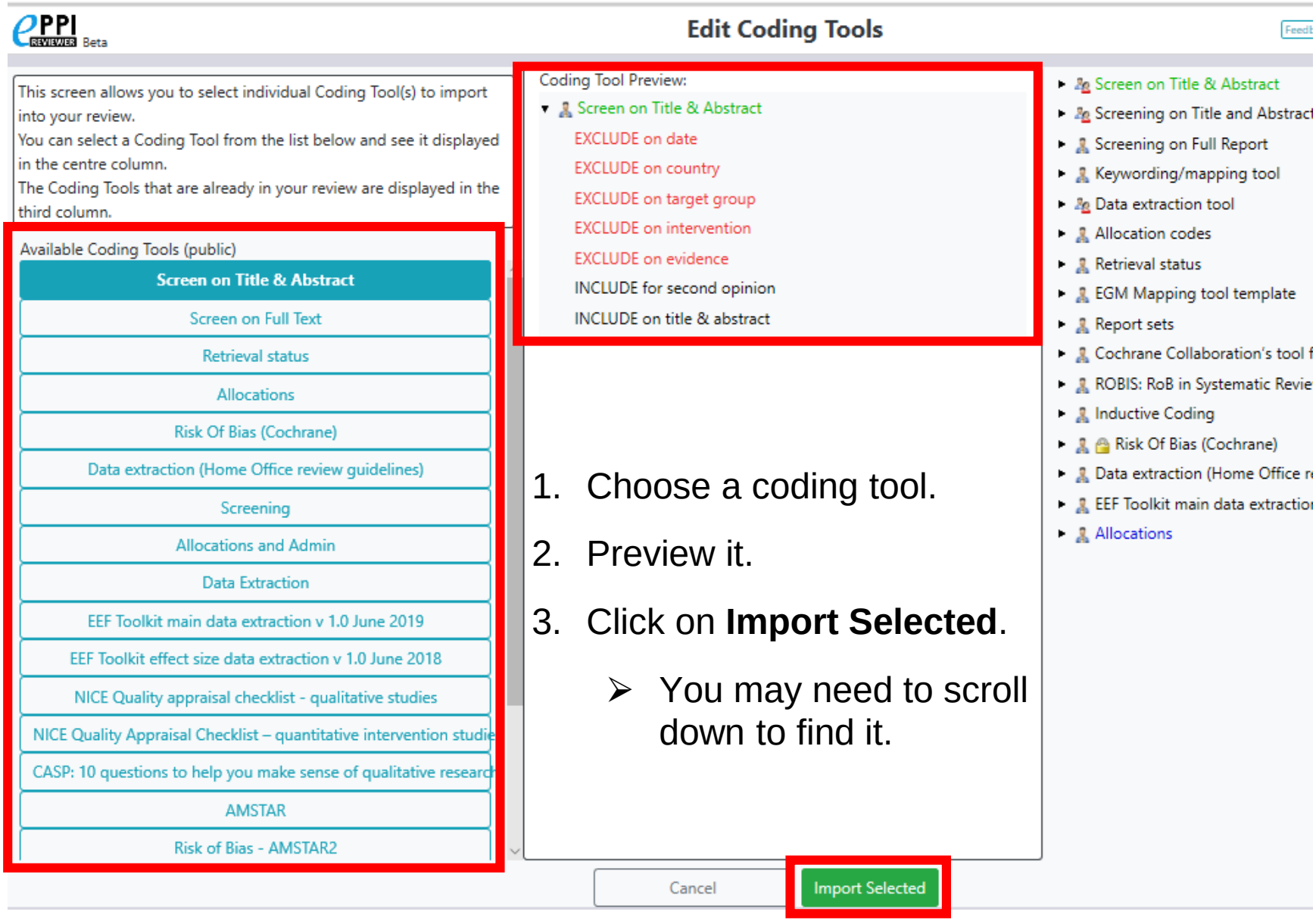
YouTube: https://youtu.be/bGTyqe_ySyA

Importing coding tools

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



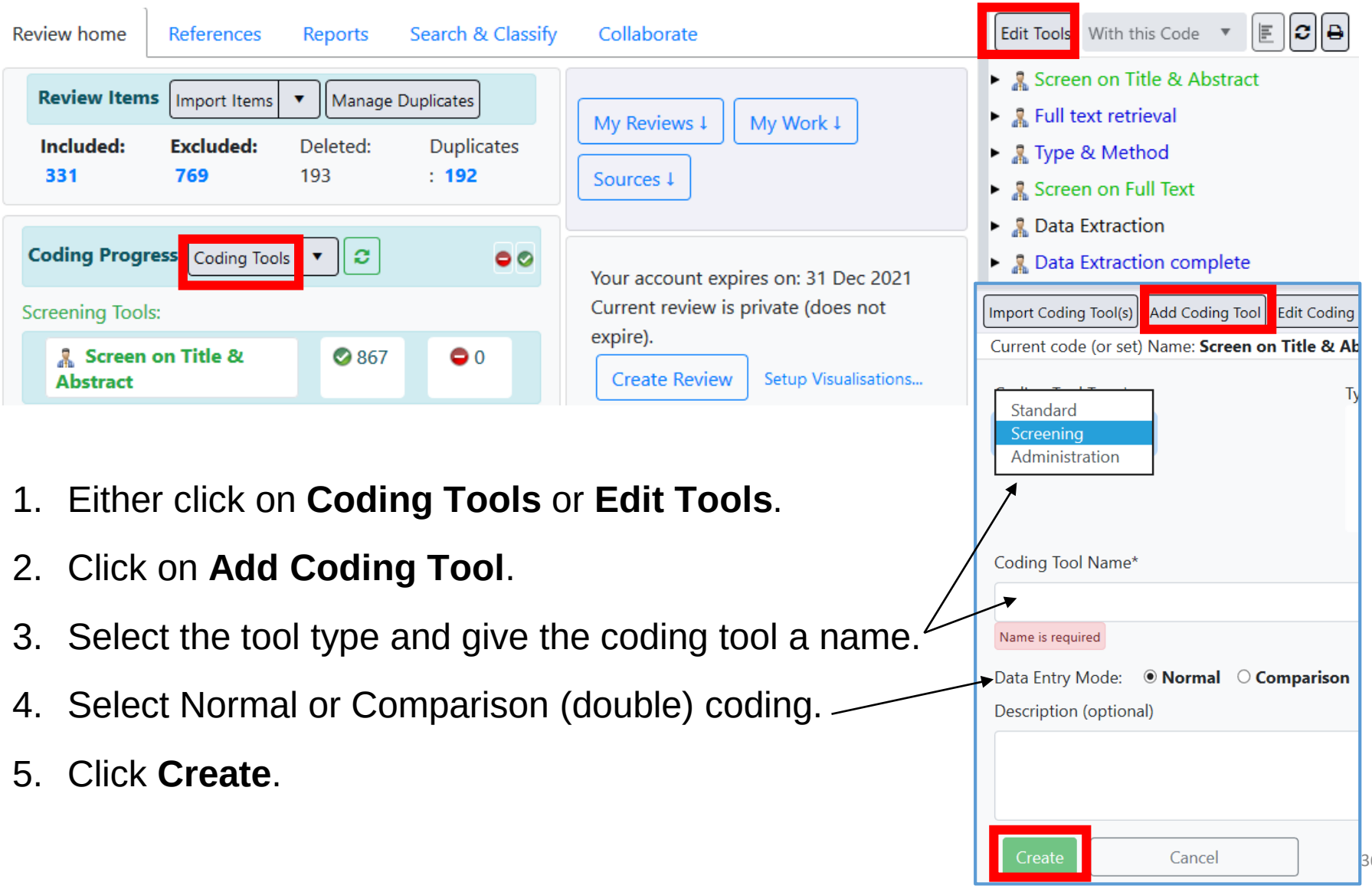
Importing public coding tools



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

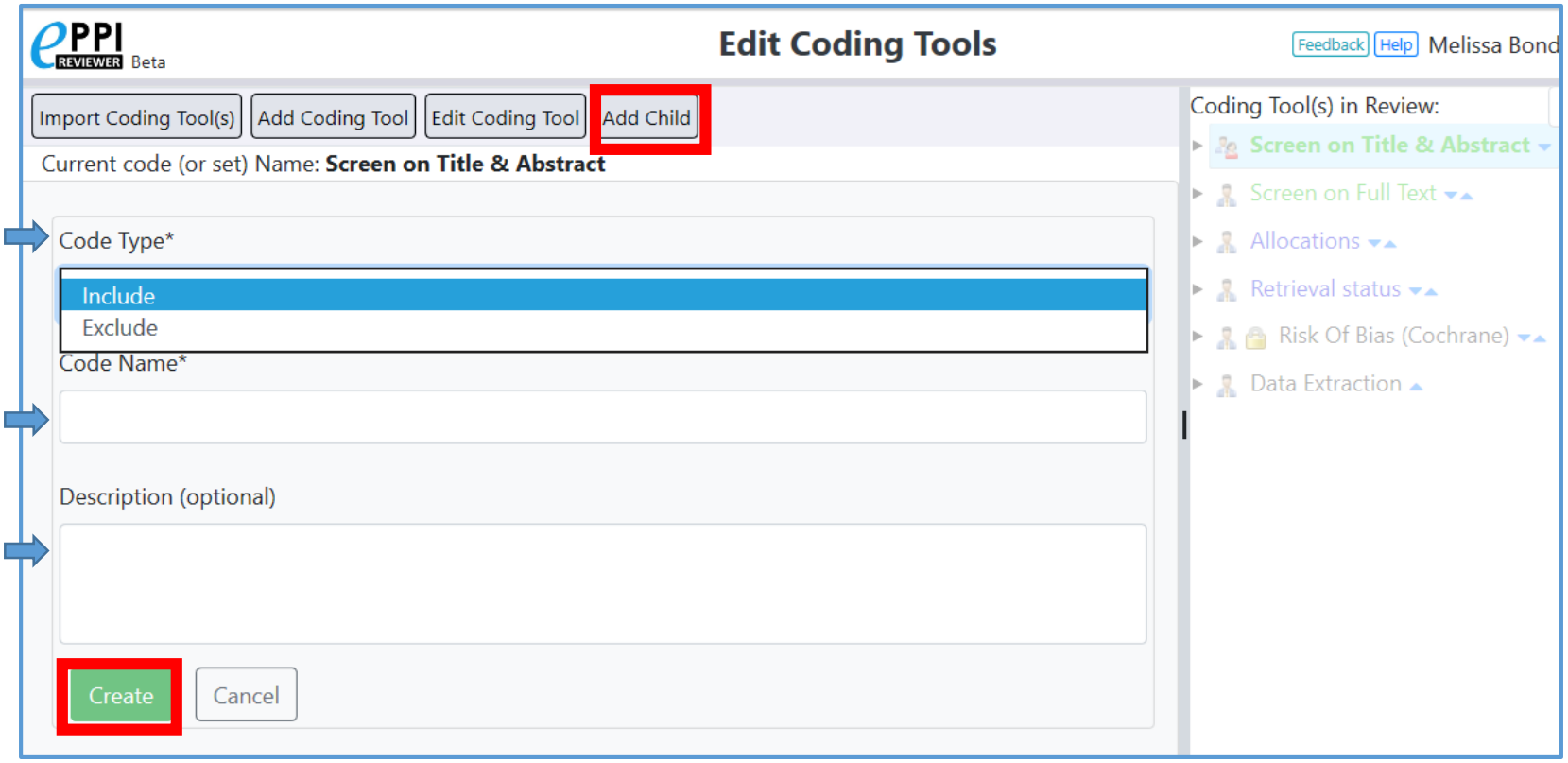
Creating coding tools

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

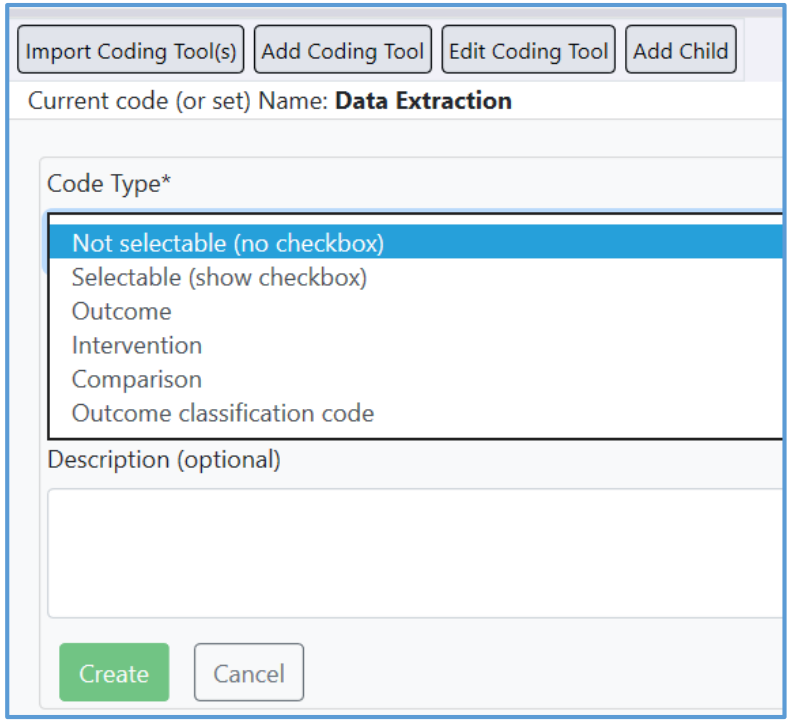


1. Select a coding tool or code in the panel on the right.
2. Click on **Add Child**.
3. Select Code Type, type in a code name and a description.
4. Click **Create.**

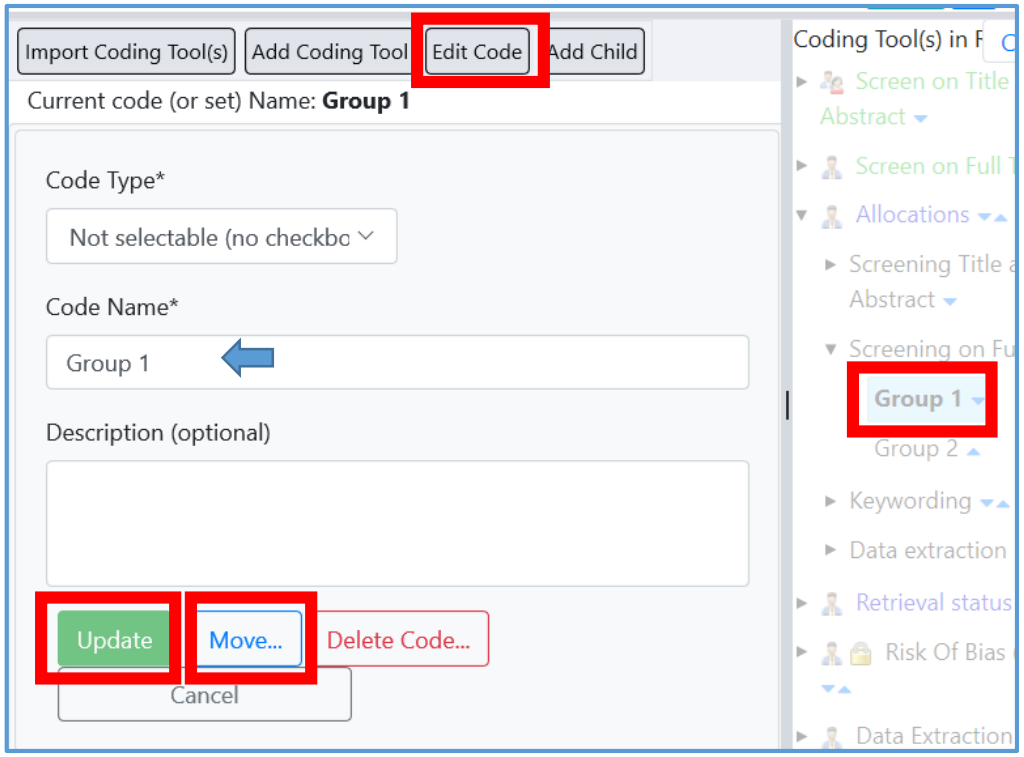
Video: https://youtu.be/bGTyqe_ySyA

Standard coding tool

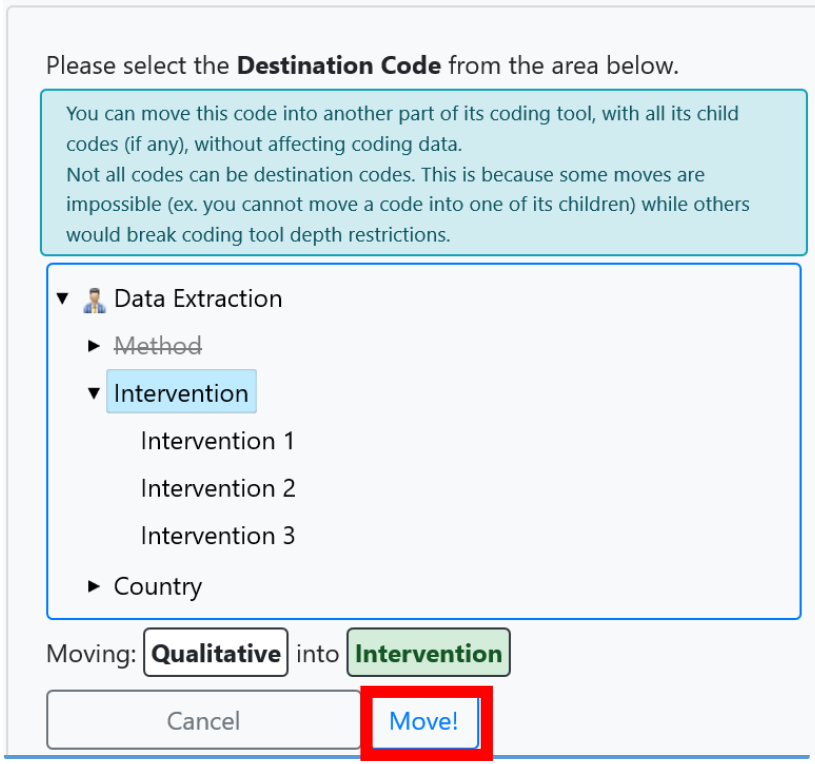
- Selectable (checkbox) or not selectable (no checkbox)
- Outcome, Intervention and Comparison code types for numeric outcome data.
- Outcome classification codes for classifying your different outcomes.



Editing child codes



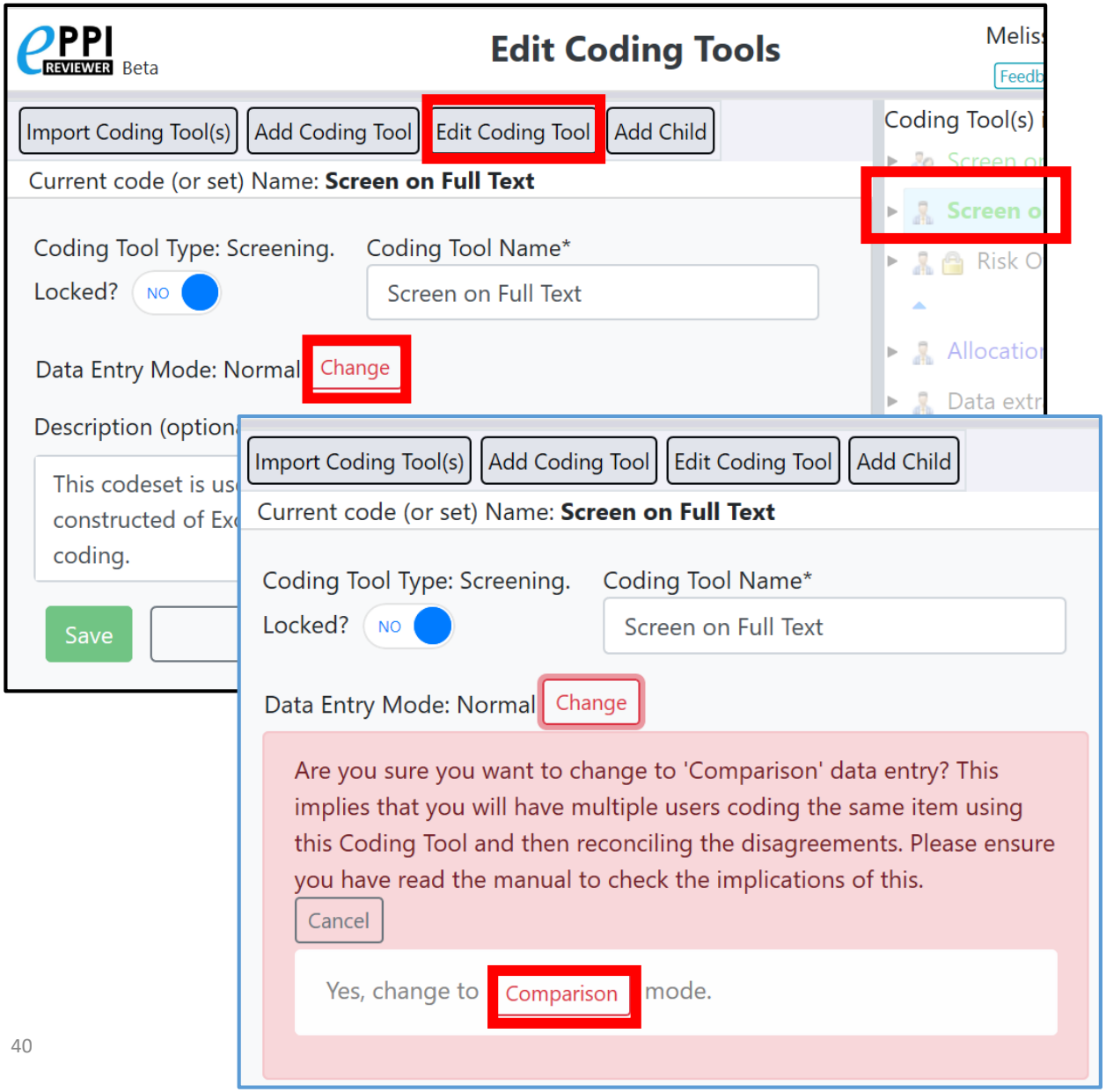
1. Select the code on the right hand side.
2. Click on **Edit Code**.
3. Type in the new code name.
4. Click on **Update**.



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

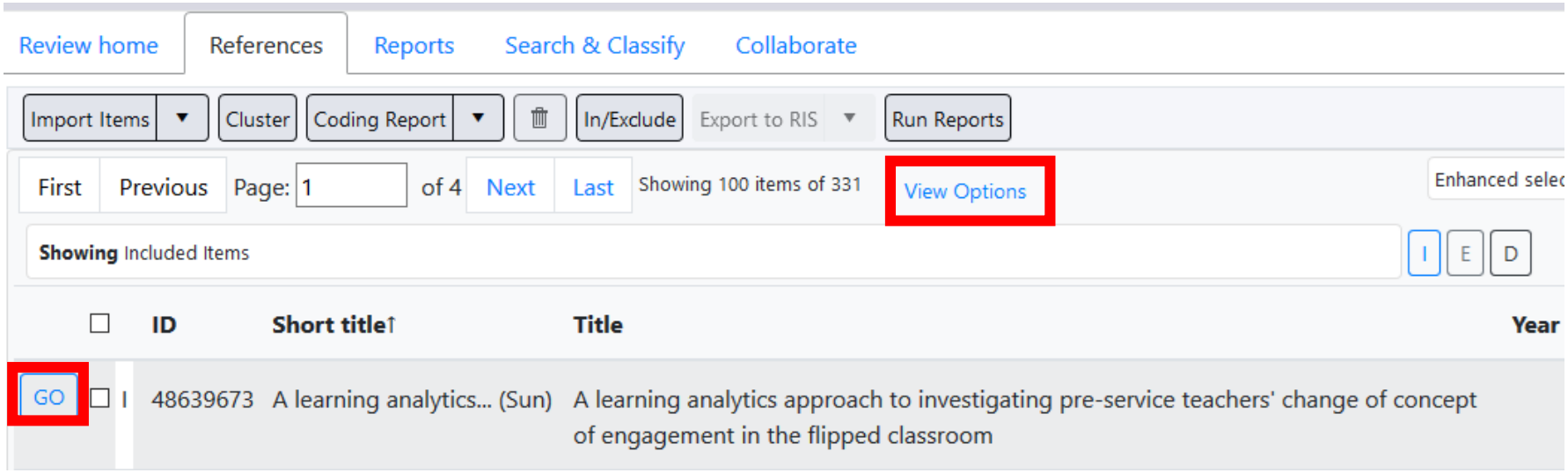
Changing coding tool data entry mode



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.

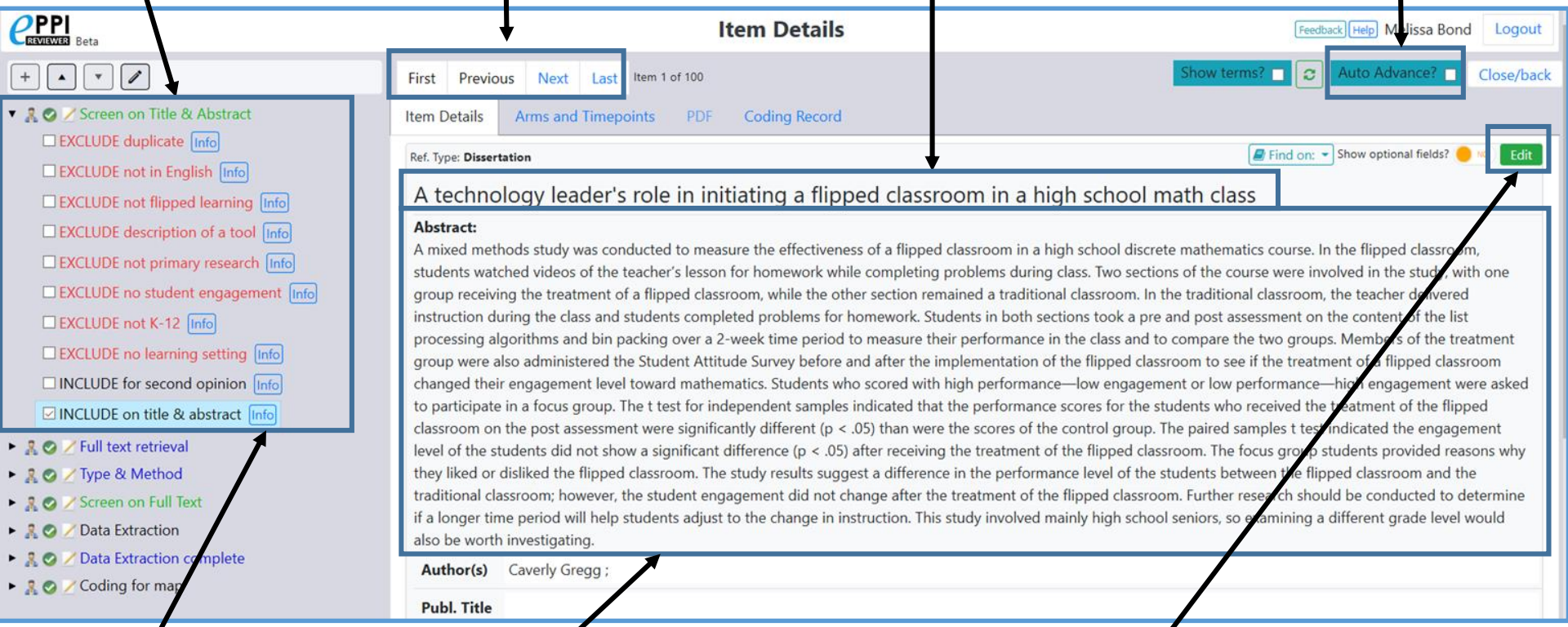
References Tab



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

Screening items – ER Web

The EPPI-Reviewer Web Item Details interface.

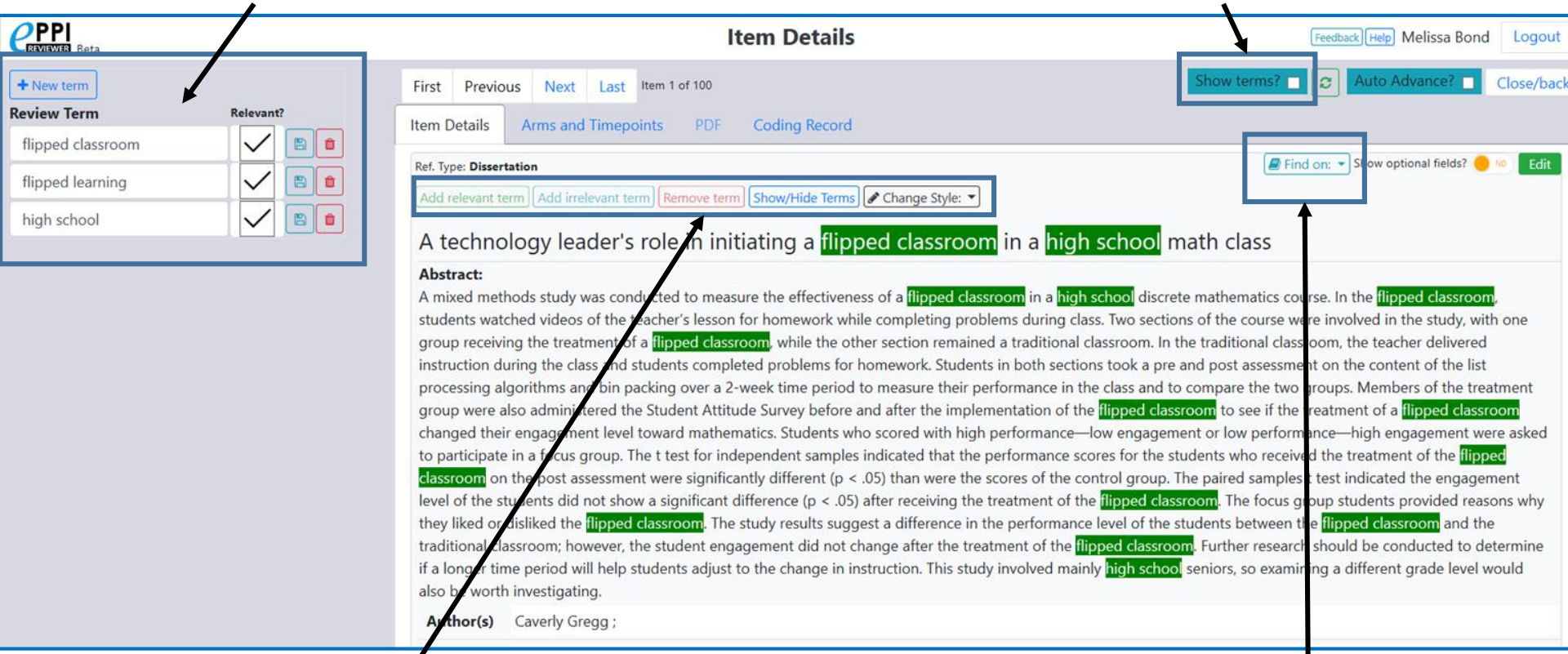


To edit an item record, you must click on the **Edit** button

Screening items – ER Web

Customise phrases

Show relevant and irrelevant terms



Add terms or change the style

Find PDF

Webinar Topics

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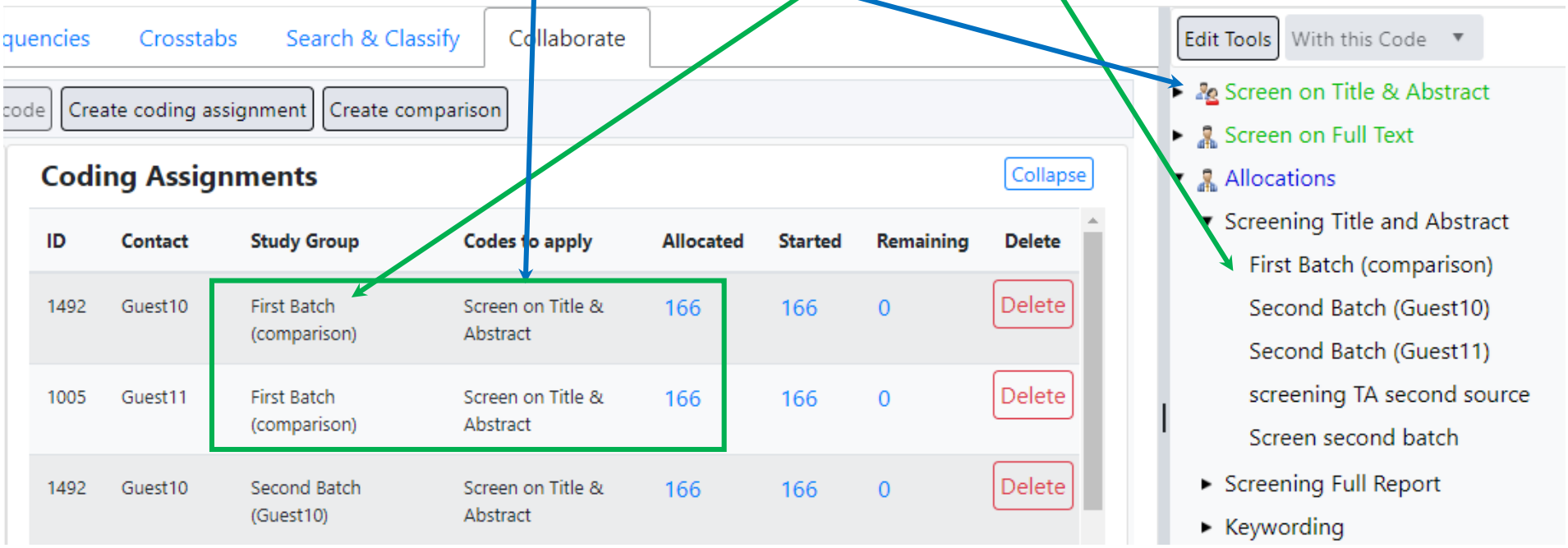
YouTube: https://youtu.be/p8xkMk9KKWQ

Coding Assignments

Coding Assignments allow you to assign work and track progress.

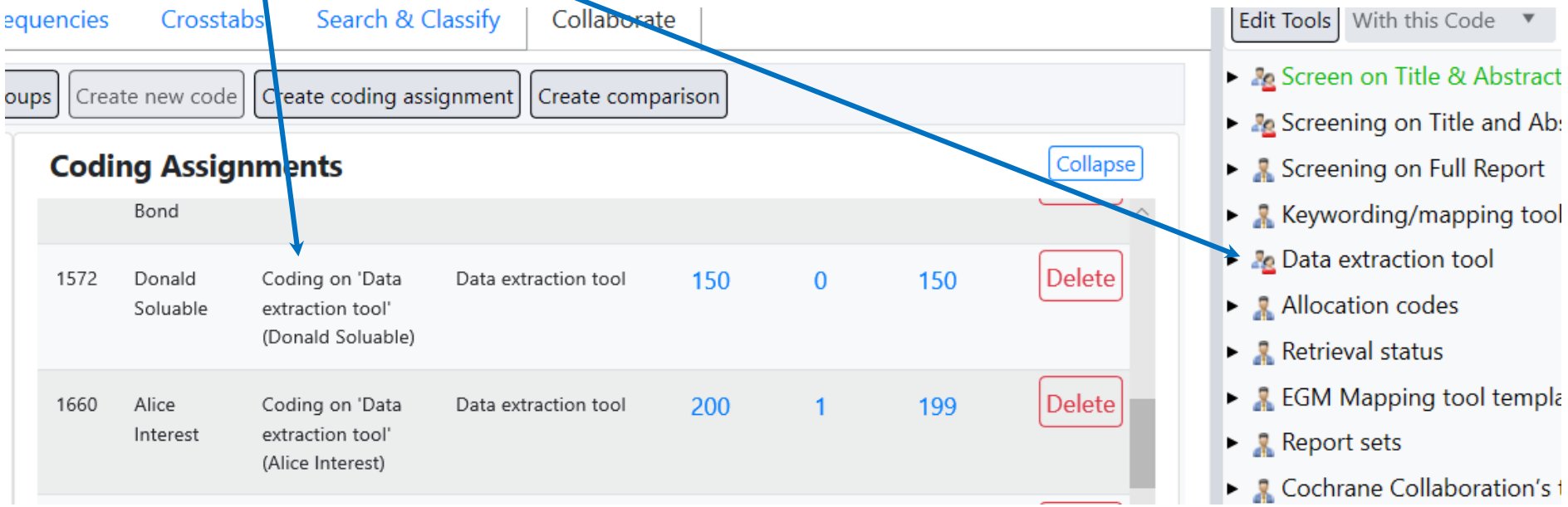
- Each assignment uses one code to identify groups of references and indicates one coding-tool to use.



YouTube: https://youtu.be/p8xkMk9KKWQ

Coding Assignments

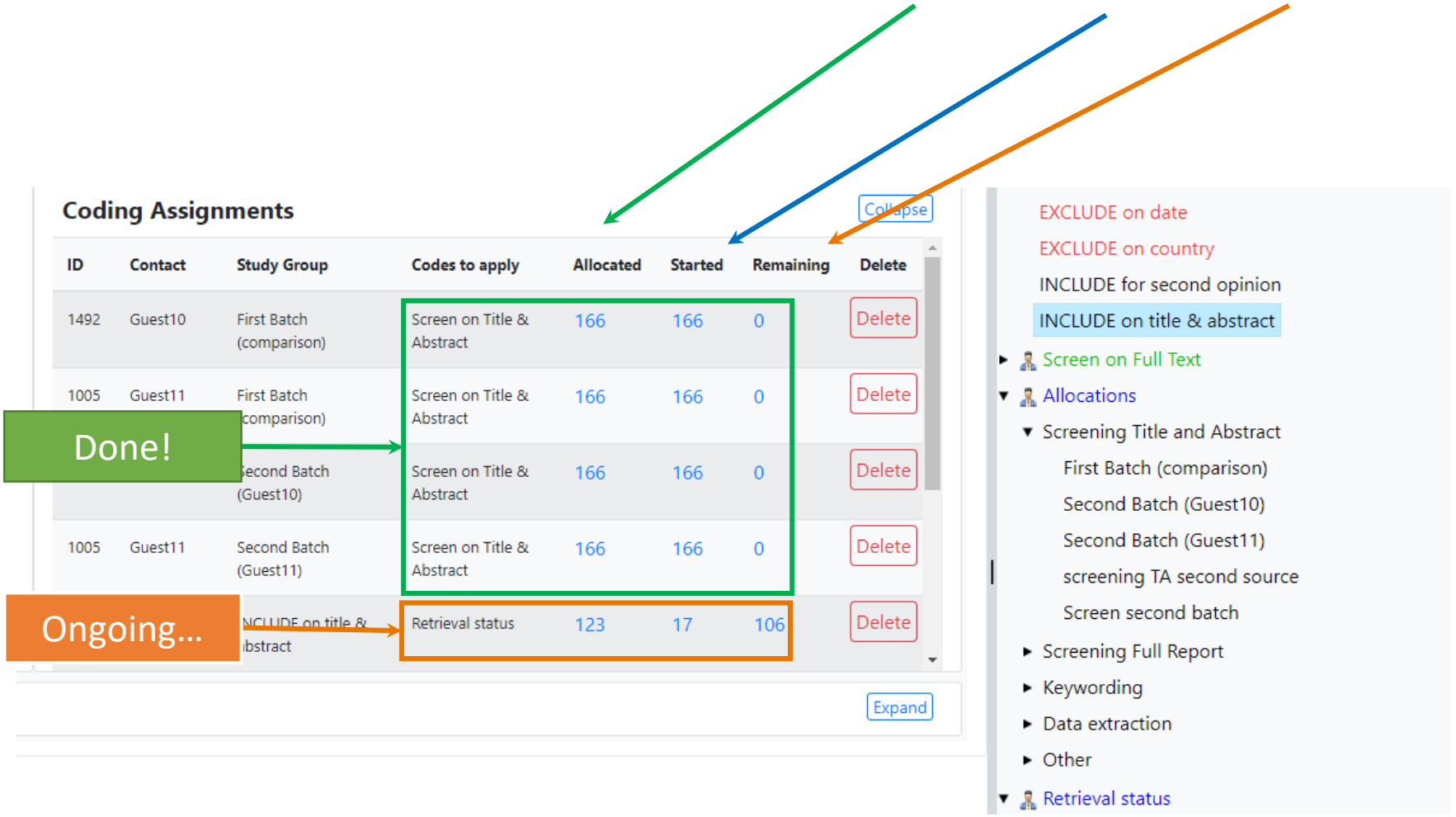
You can also assign screening or data extraction codes to a Coding Assignment.



YouTube: https://youtu.be/p8xkMk9KKWQ

Coding Assignments

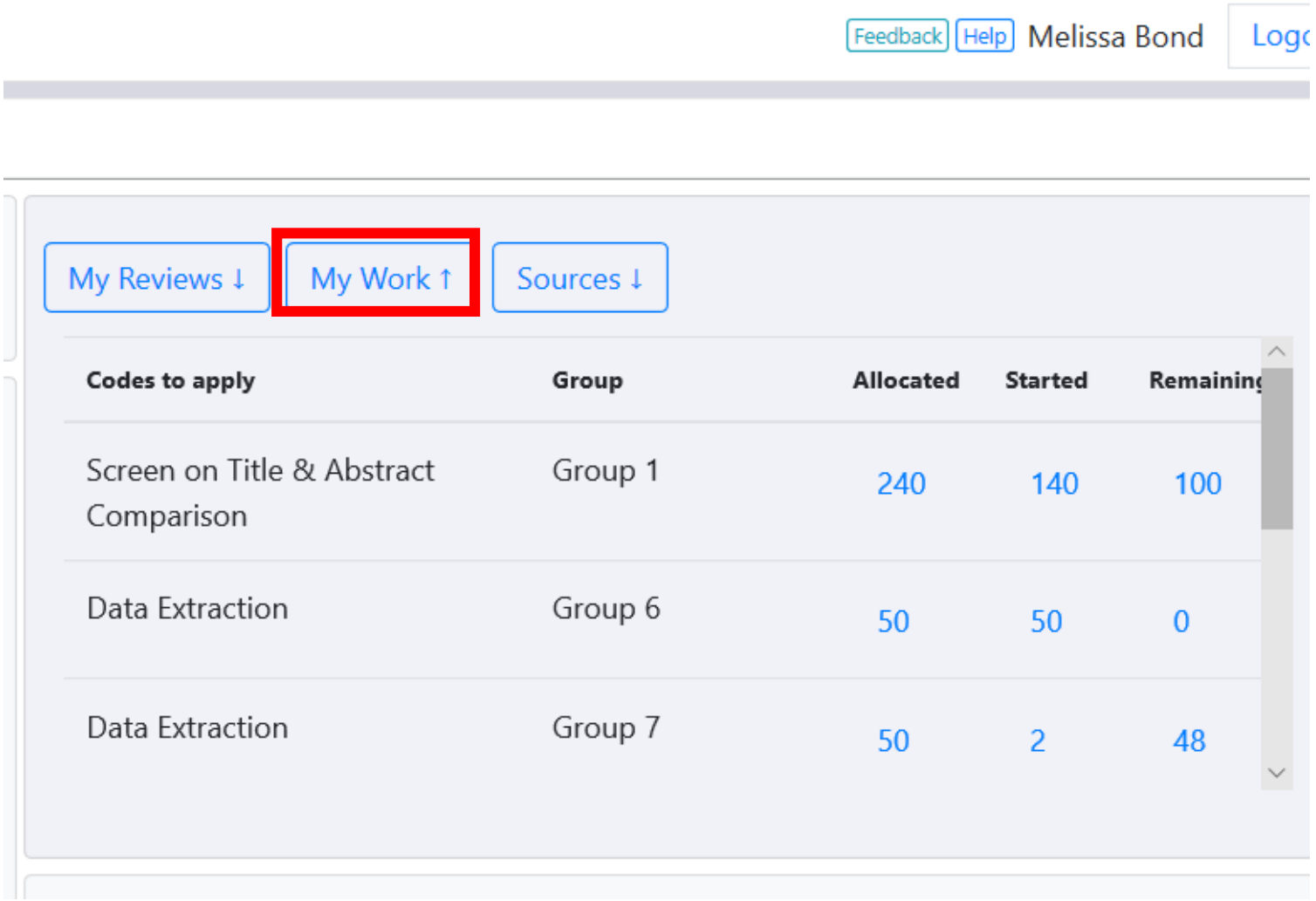
Each assignment reports updated numbers: Allocated, Started and Remaining



YouTube: https://youtu.be/p8xkMk9KKWQ

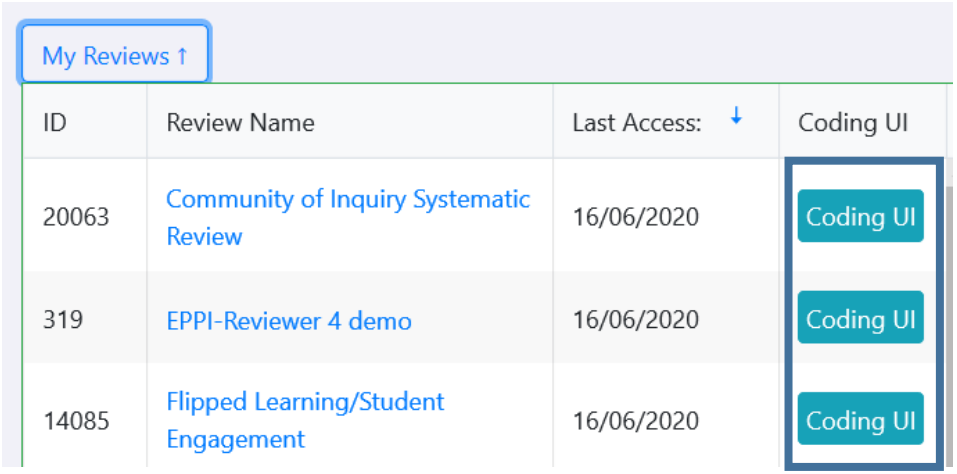
Coding Assignments

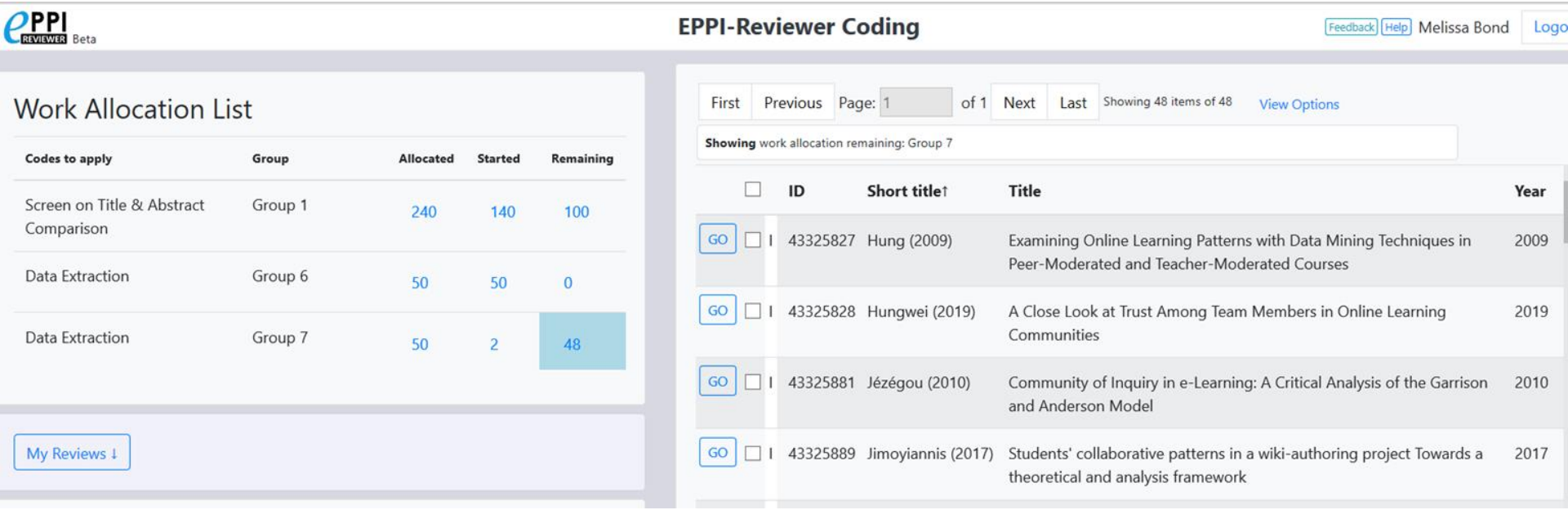
Assignments show up under the My Work tab (on the Review Home page):



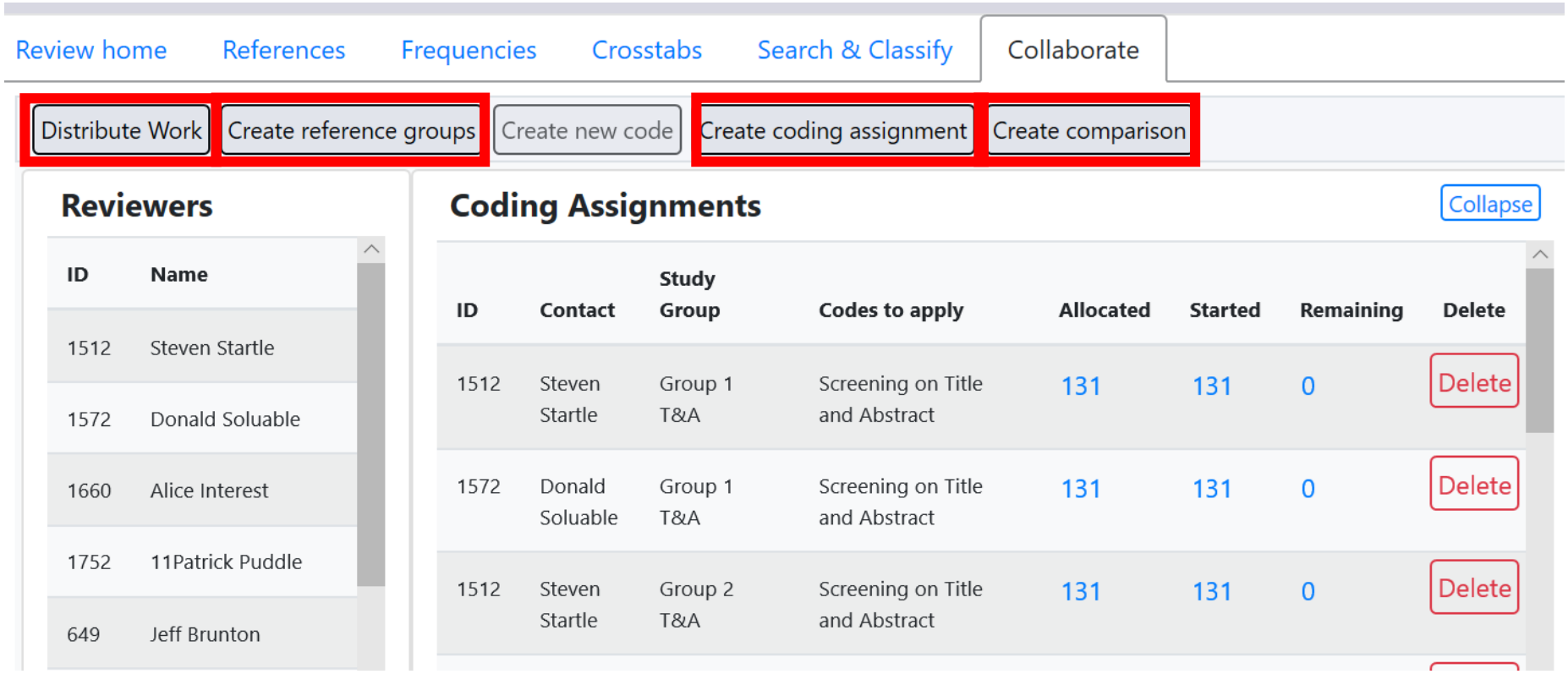
Coding Assignments

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





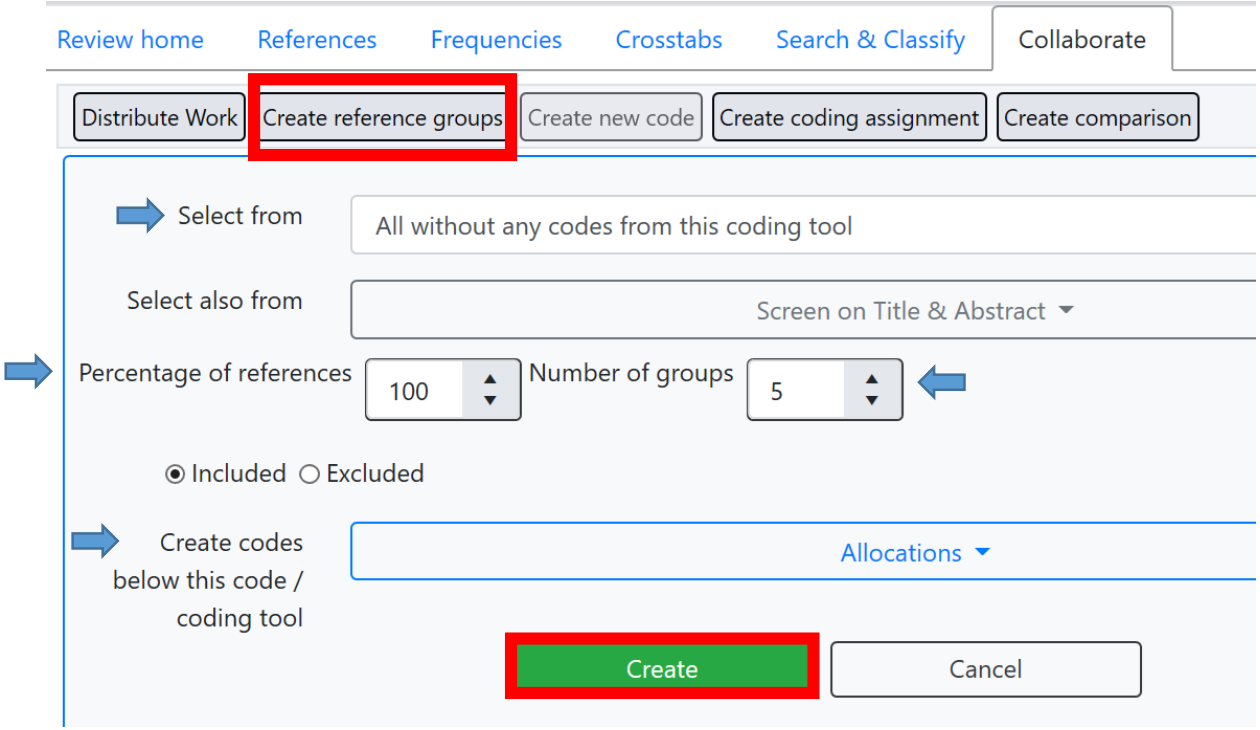
Collaborate tab



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**.

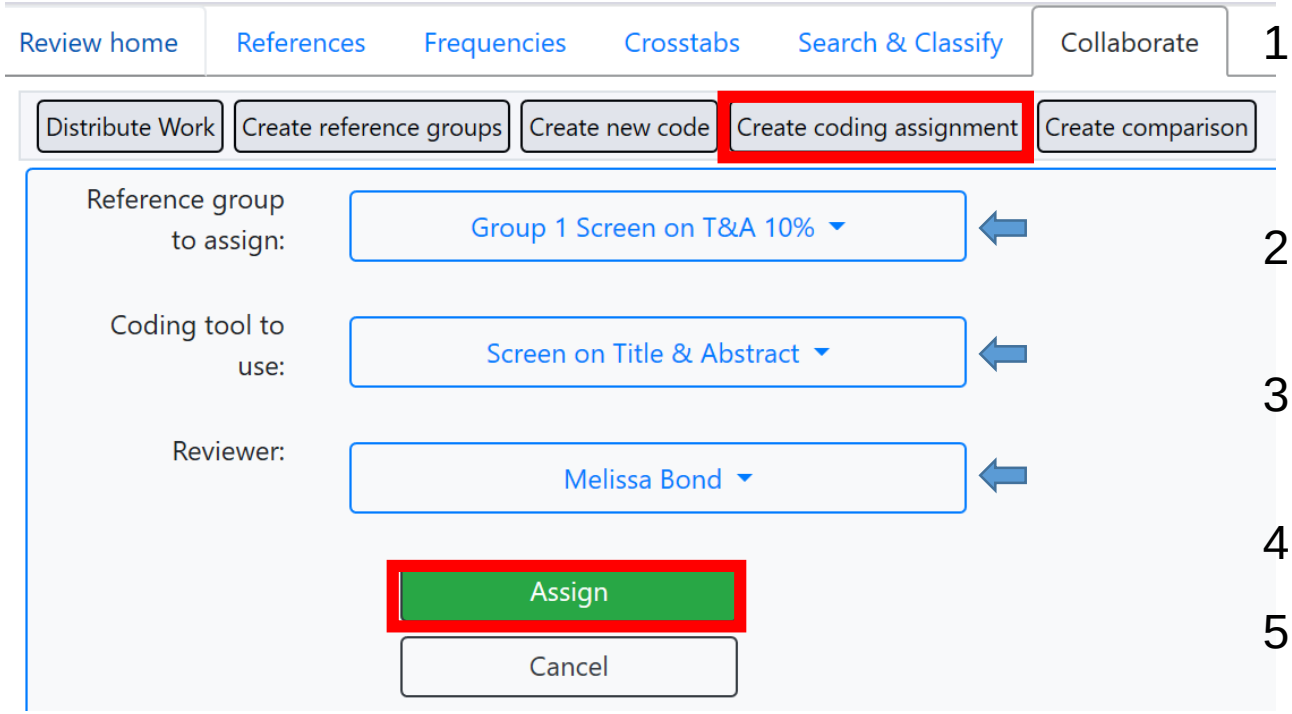
Video: https://youtu.be/p8xkMk9KKWQ

Creating coding assignments

Coding Assignments

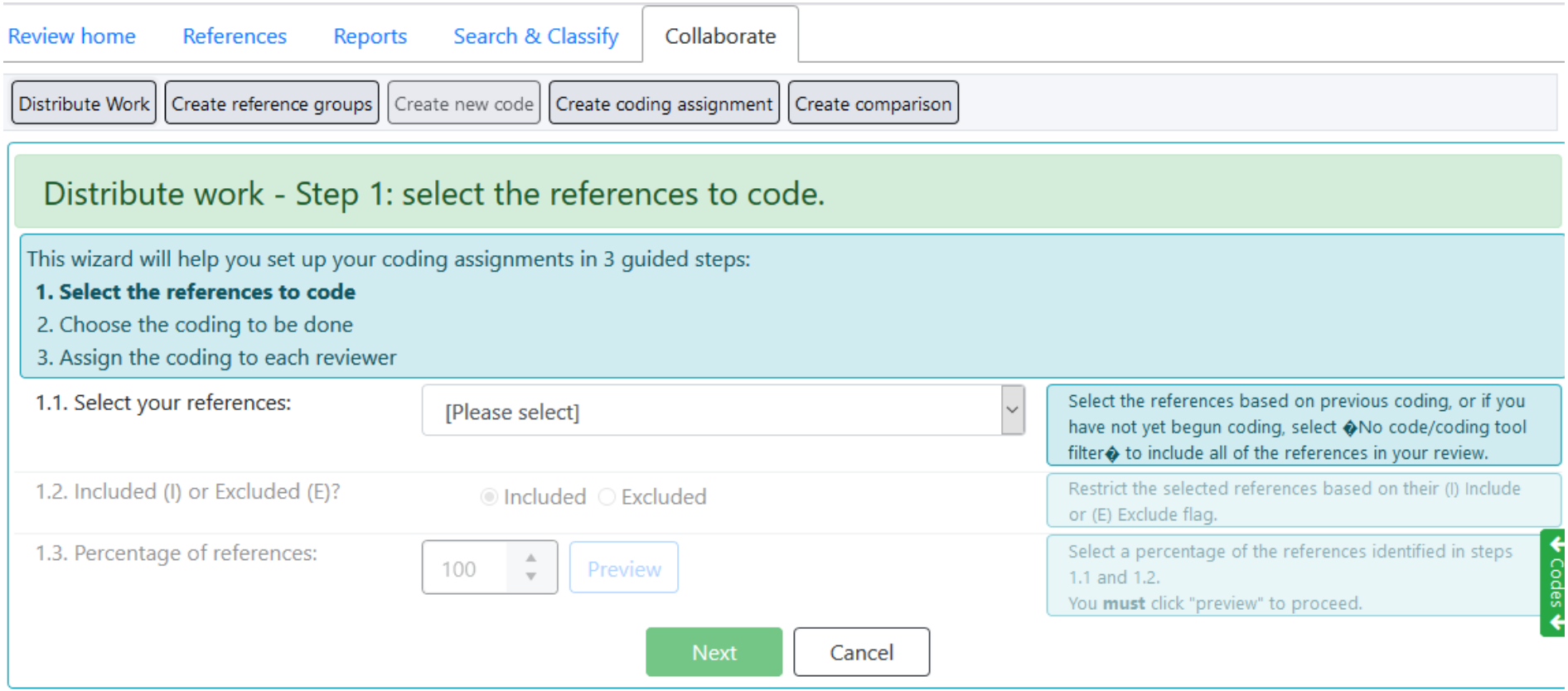
Video: https://youtu.be/p8xkMk9KKWQ

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



YouTube: https://youtu.be/A6KWCWx0jwI

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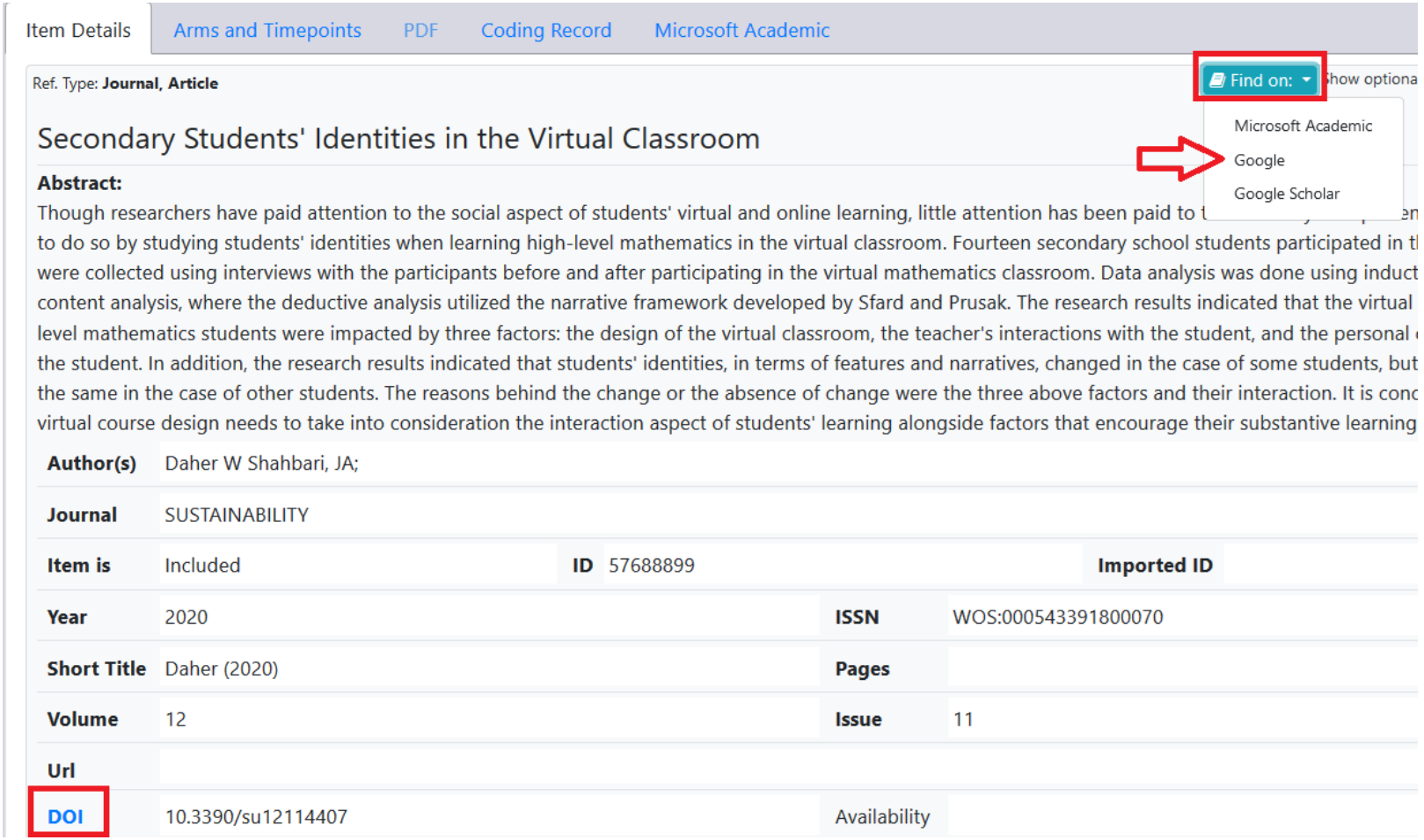
- ❑ EPPI-Visualiser and EPPI-Mapper
- ❑ Any other questions?

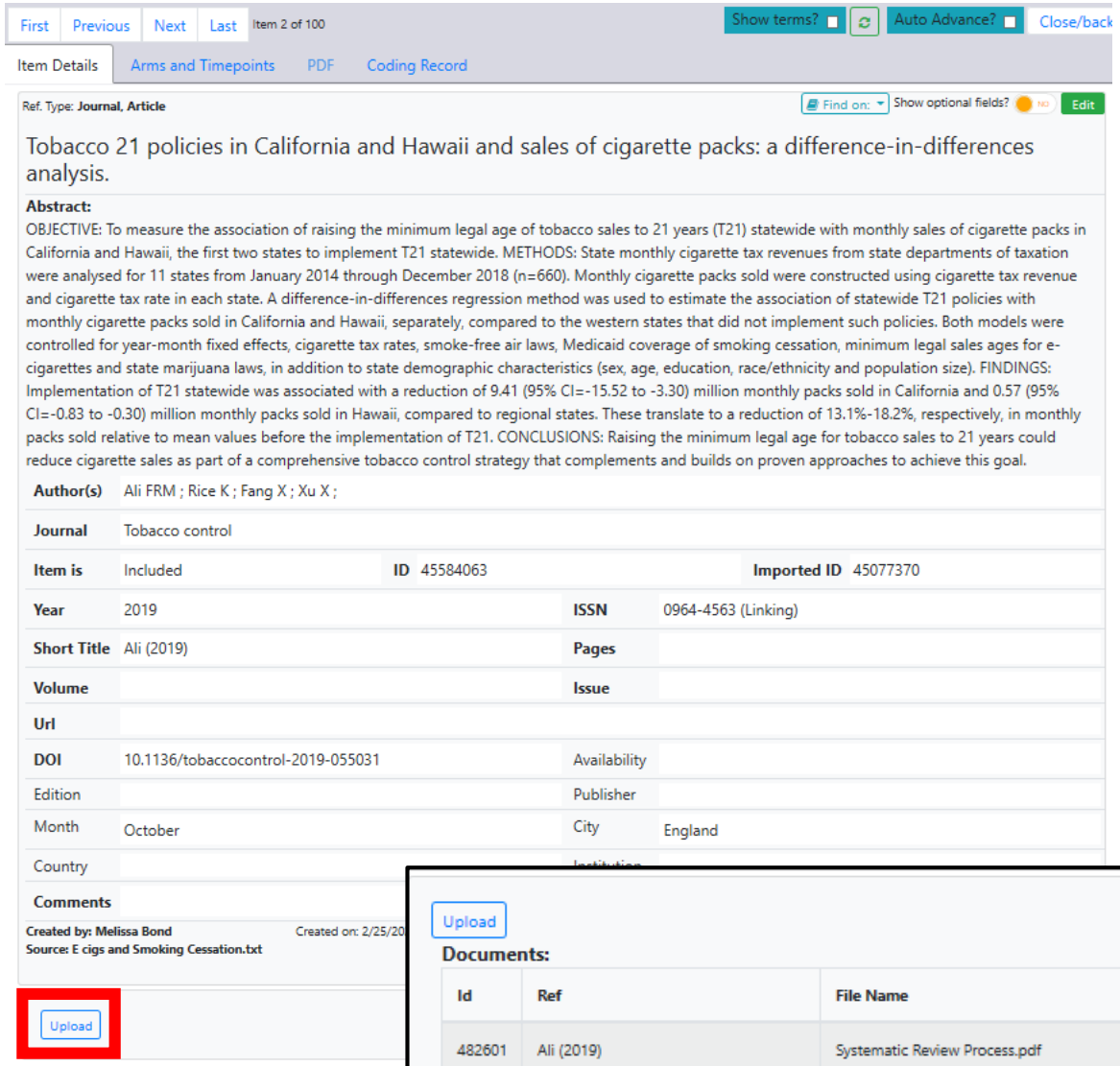
YouTube: https://youtu.be/9eP70M4a9iE

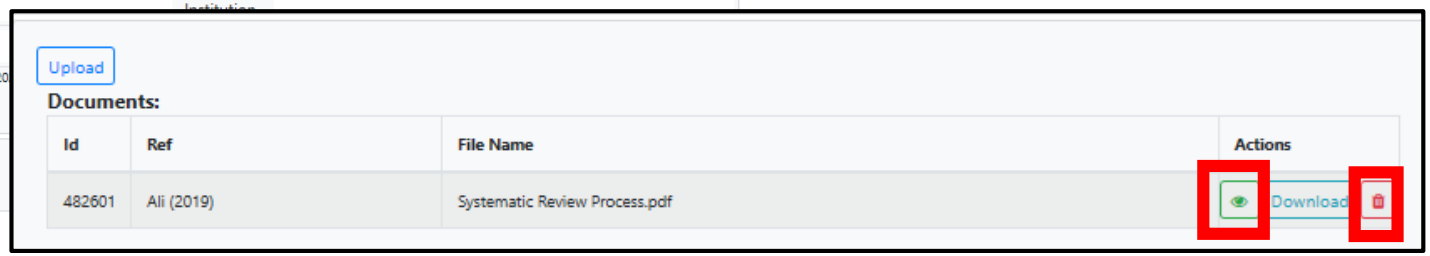
Locating PDFs



- Connect to your institution via VPN or remote desktop.
- If there is a URL or DOI for the item, click on the blue name.
- Alternatively, use the ‘Find on’ button in the top right hand corner.

Uploading PDFs



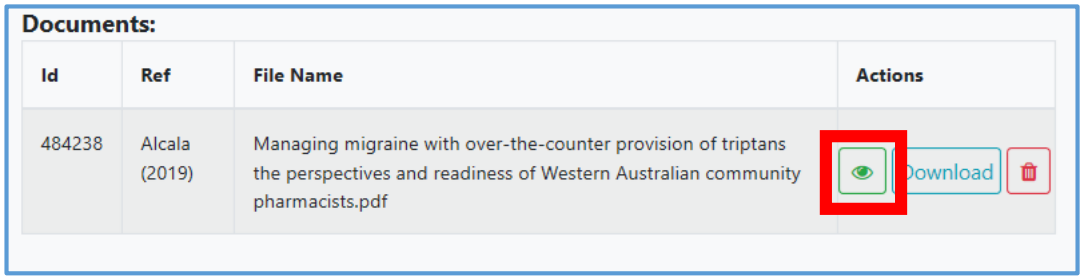


- Click on **Upload** at the bottom of the item record.
- Select the file you want to upload and click on Open.
- Your file will now appear at the bottom of the item record, in the Documents panel.
- To view the PDF, click on the green eye icon.
- To delete the PDF, click on the red trash icon.

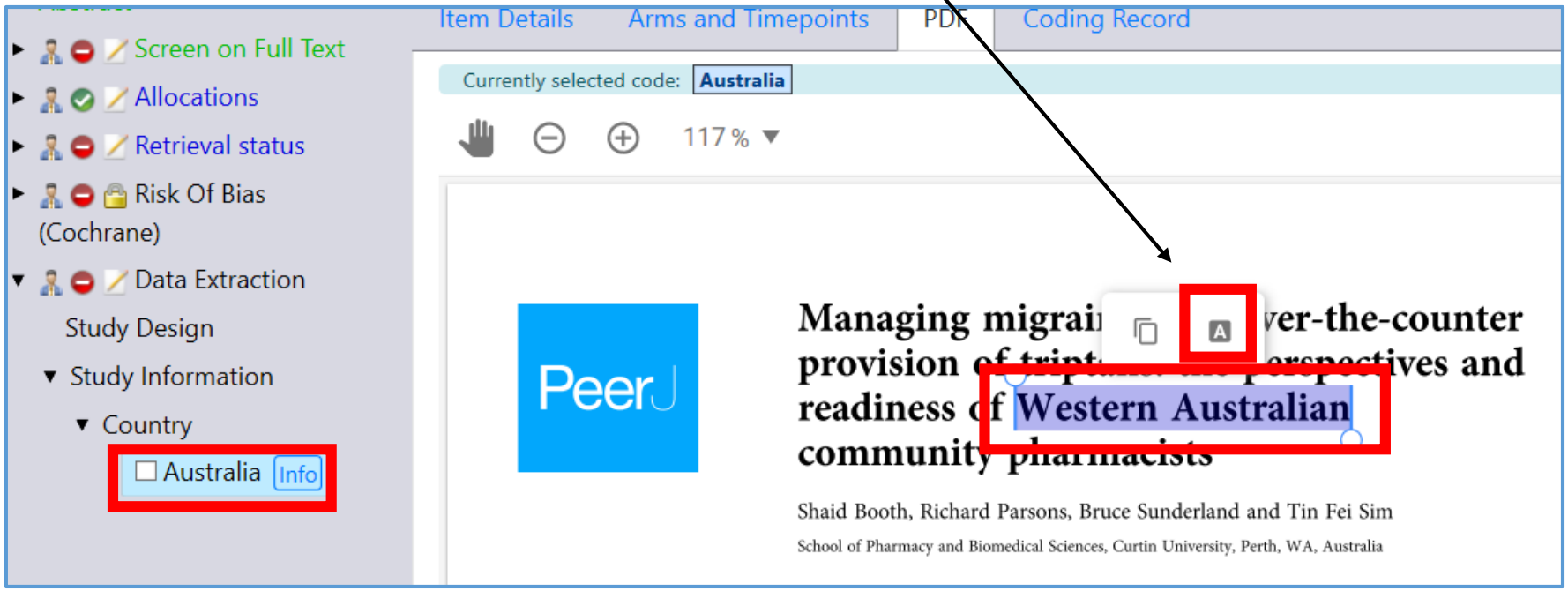
Line by Line PDF Coding – ER Web

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

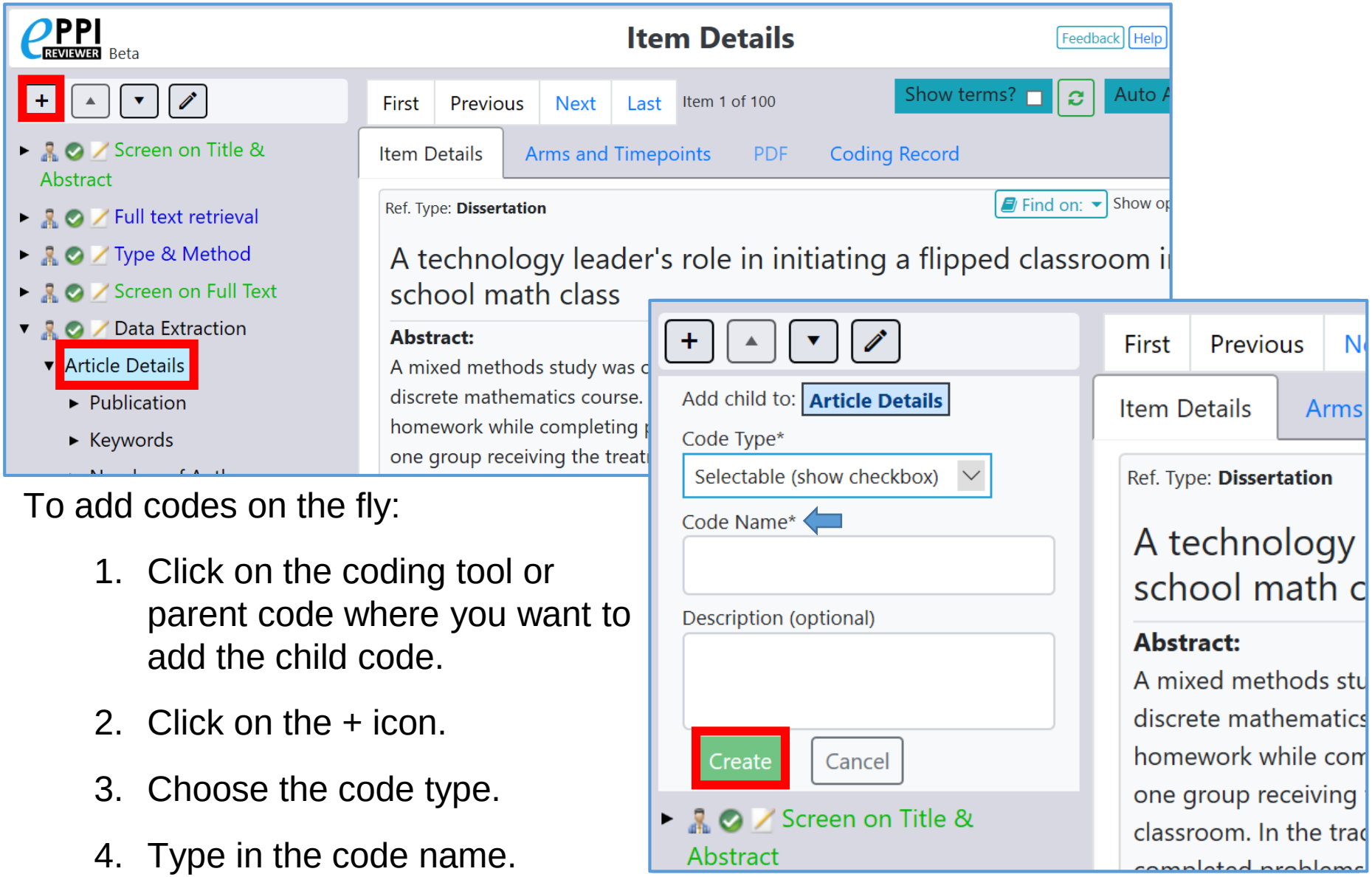
1. Click on the **green eye icon** to display the PDF.
2. Highlight the text in the PDF you want to code.



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



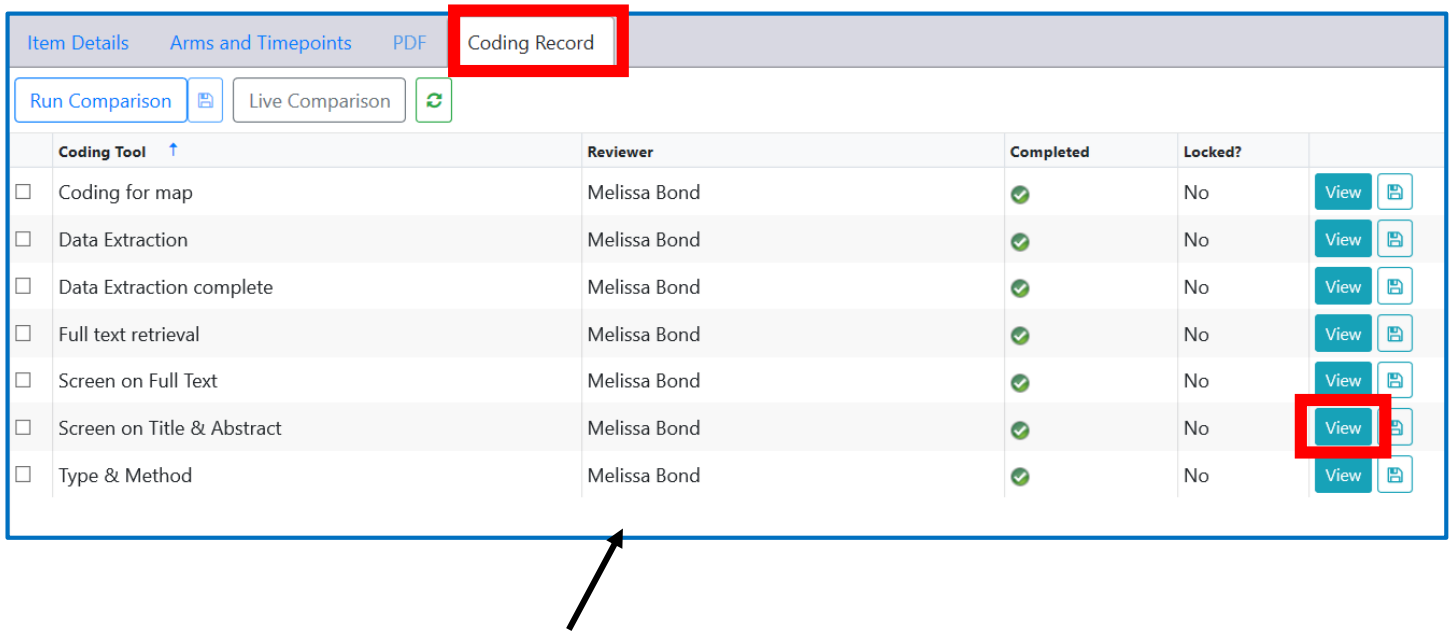
Inductive Coding



To add codes on the fly:

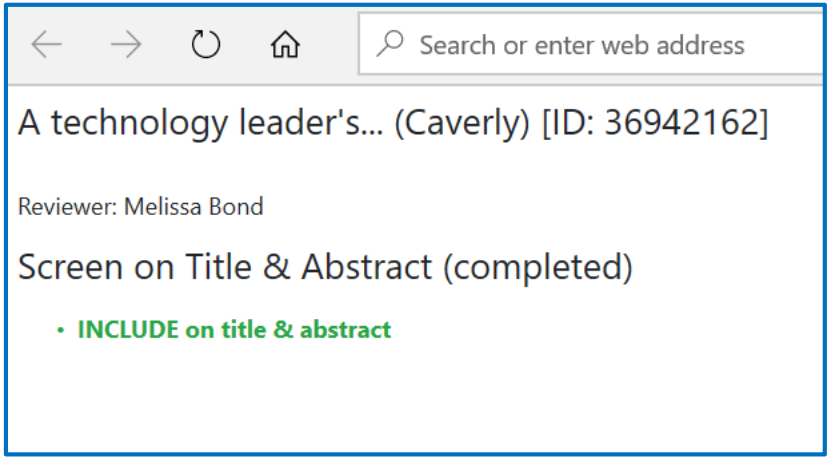
1. Click on the coding tool or parent code where you want to add the child code.
2. Click on the + icon.
3. Choose the code type.
4. Type in the code name.
5. Click on **Create**.

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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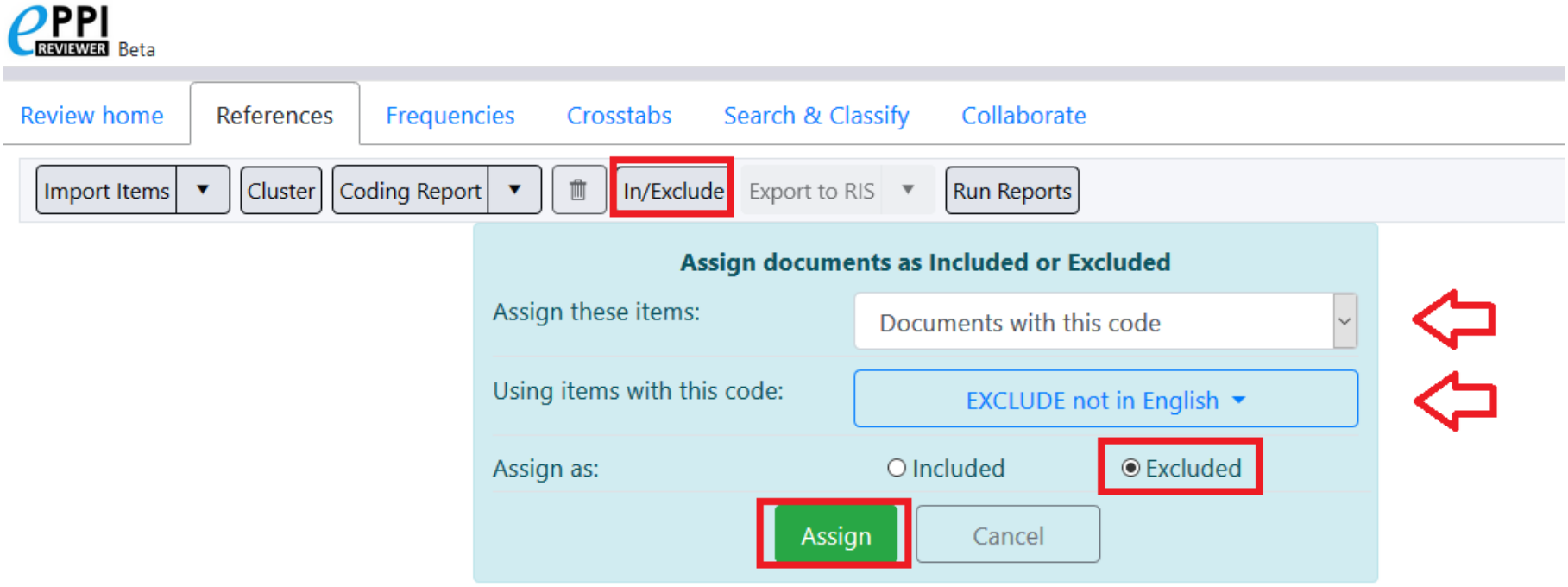
YouTube: https://youtu.be/iGXgpb4bwFg

Applying the exclusion flag

After screening on title & abstract, and after screening on full text, you might like to officially exclude the items that you have given an EXCLUDE code to.

- Not necessary but does make it easier to track included items.



1. In the References tab, click on the 'In/Exclude' button.
2. Choose whether to assign items by specifying or by a particular code.
3. If by particular code, choose the first one in your list, e.g. EXCLUDE not in English.
4. Change the 'Assign as' toggle to 'Excluded'.
5. Click on 'Assign'.
   - The number of included/excluded items on the Review Home page will update.

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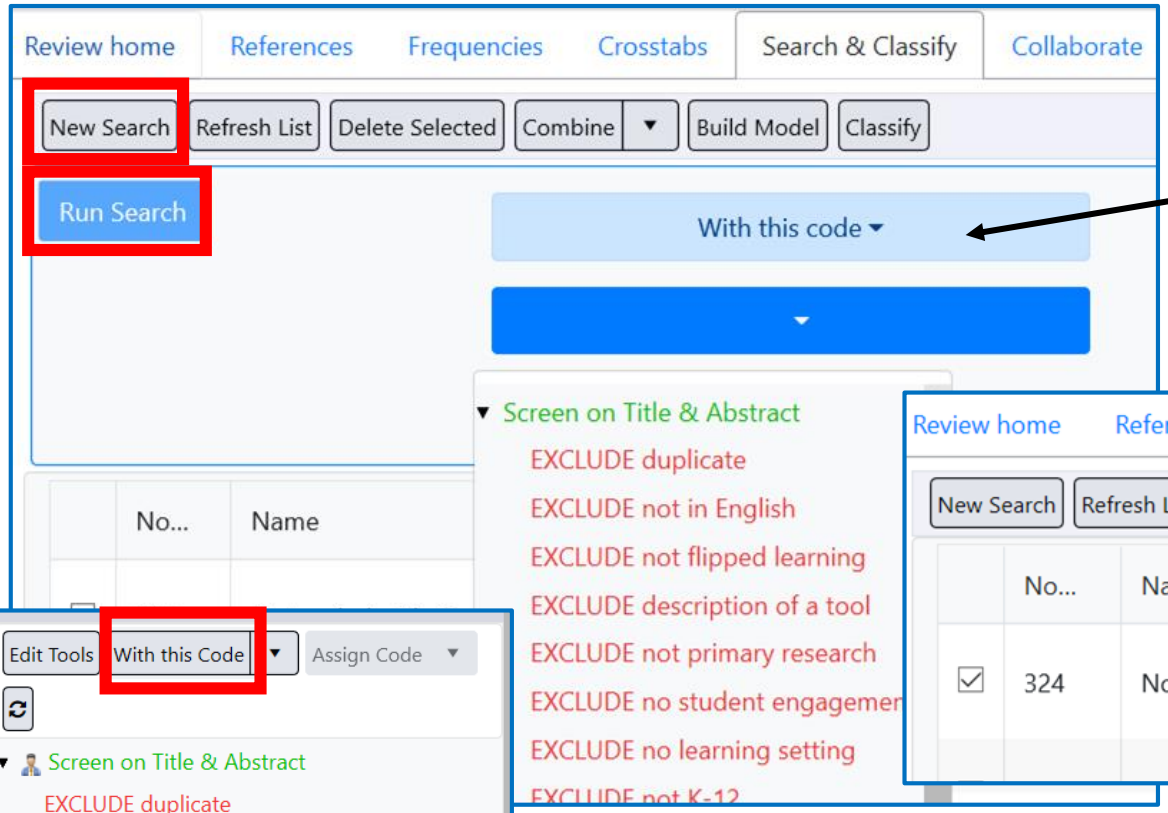
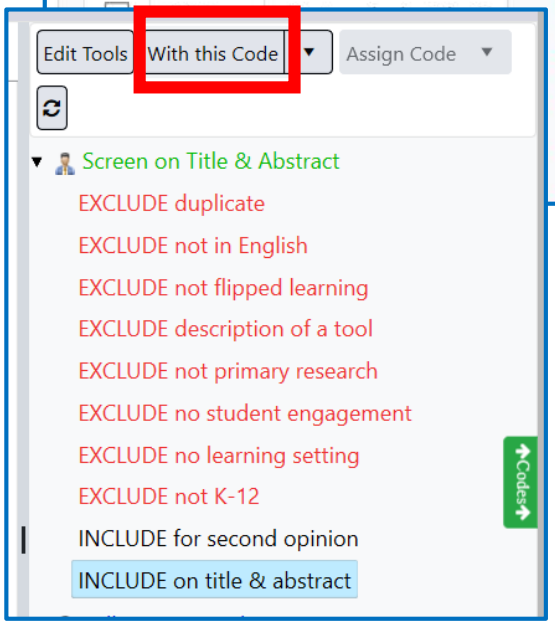
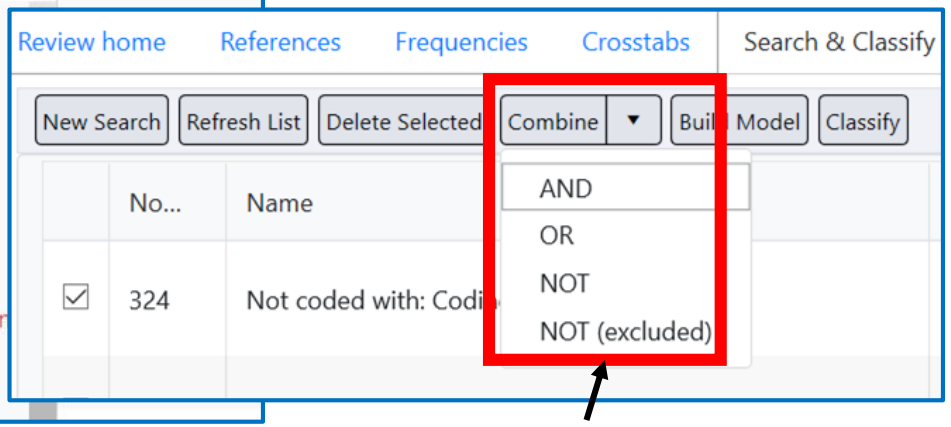
Searching ER Web





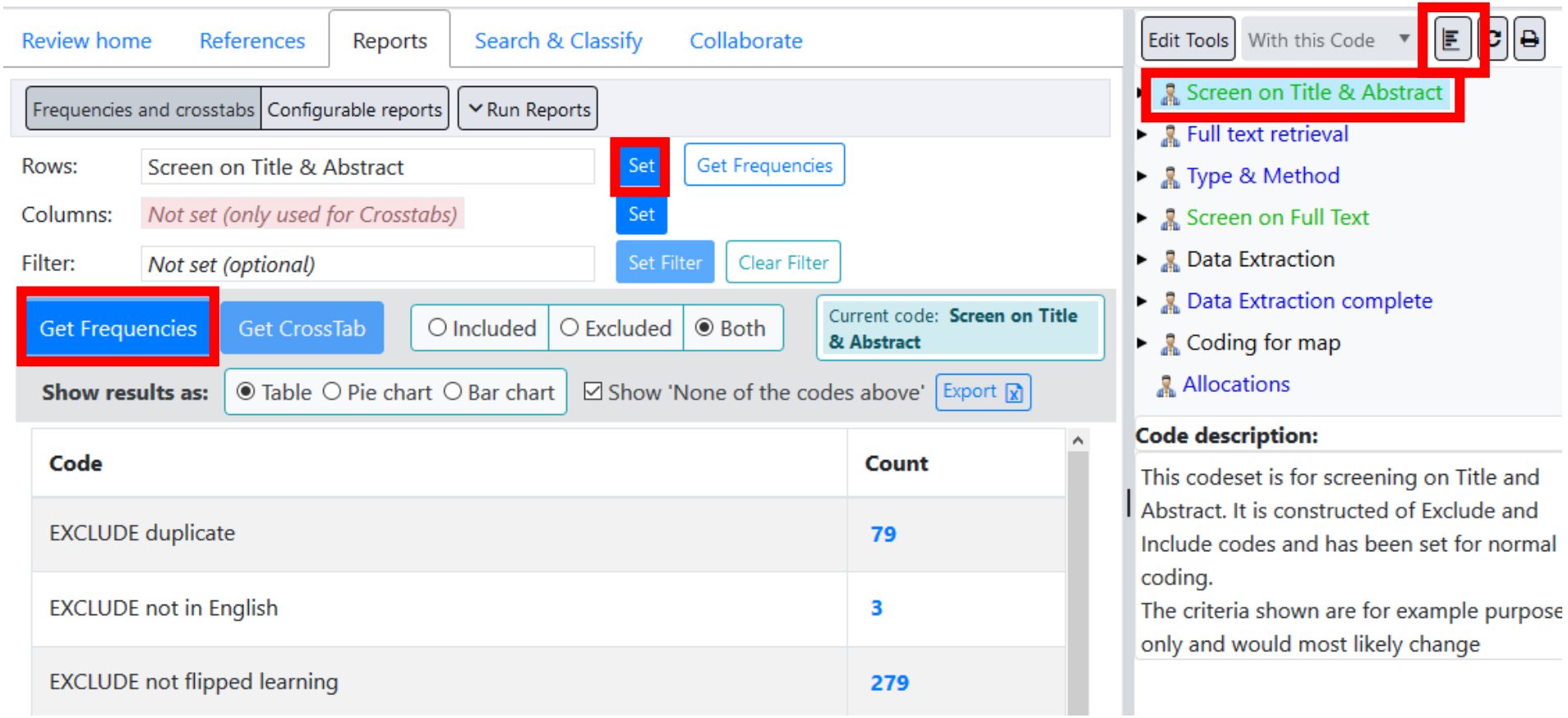


1. Click on **New Search**.
2. Choose how you want to search for your items.
3. Click on **Run Search**.

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**.

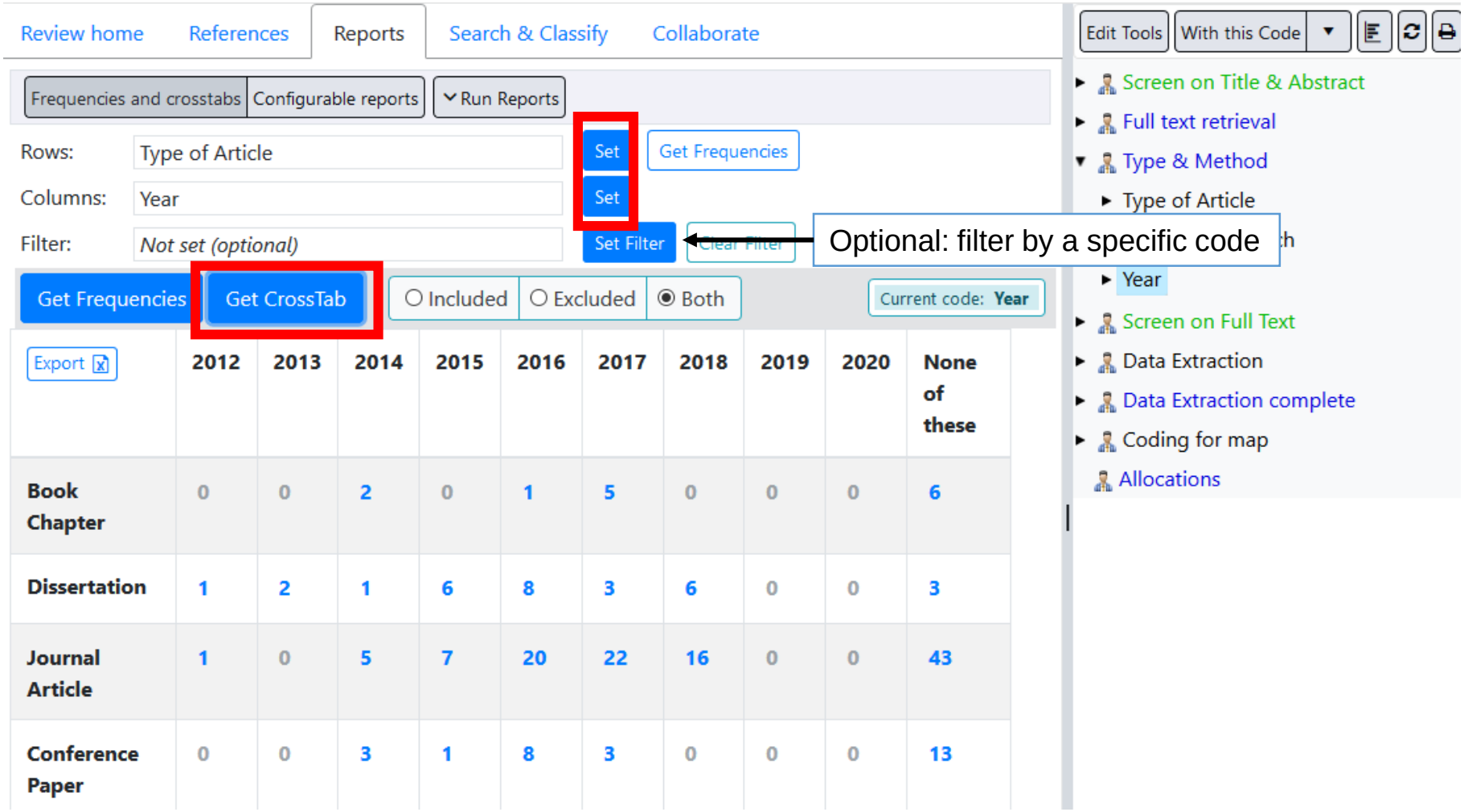
Frequency Report



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

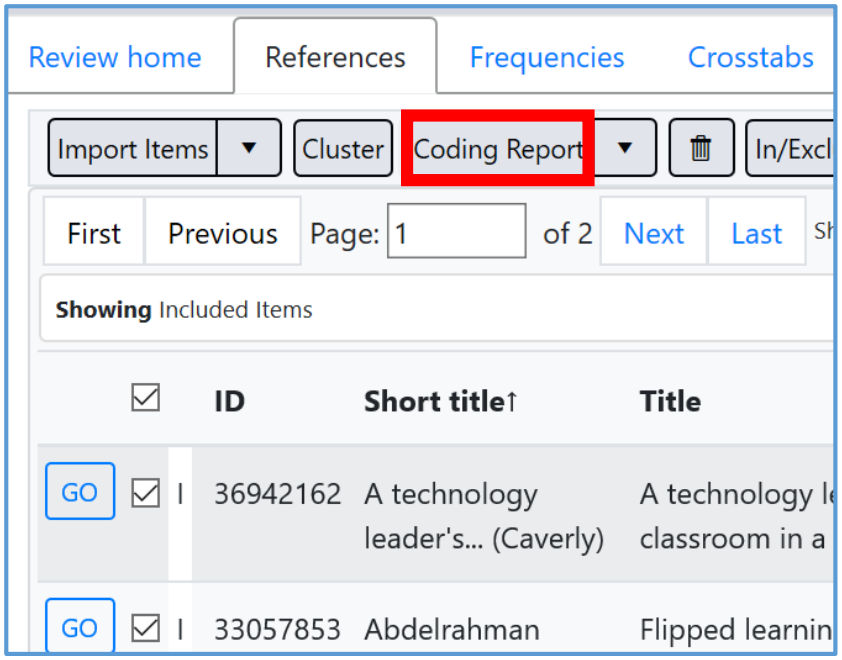
- Clicking a blue number in the Count column will list those items.
- Alternatively, you can click on the graph icon at the top of the coding panel.

Crosstab Report



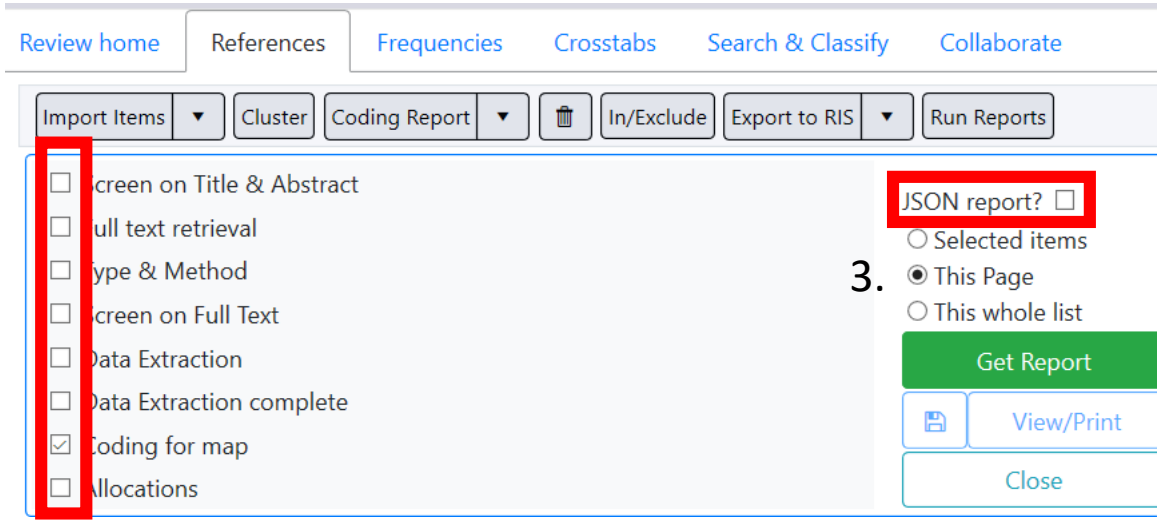
1. Choose a parent code for the X-axis and the Y-axis by selecting the code in the Codes panel and clicking **Set**.
2. Click on **Get CrossTab**.

Coding Reports



Similar to a coding report in ER4.

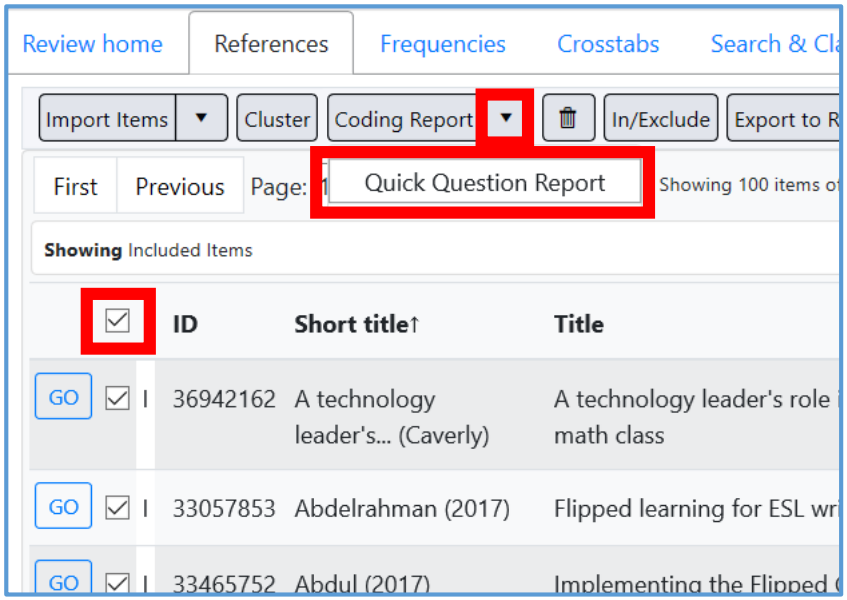
1. Click on **Coding Report**.
2. Choose which coding tools to include.
3. Choose which items to include.
4. Click the checkbox next to JSON report? to create a JSON report for an interactive evidence gap map.



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

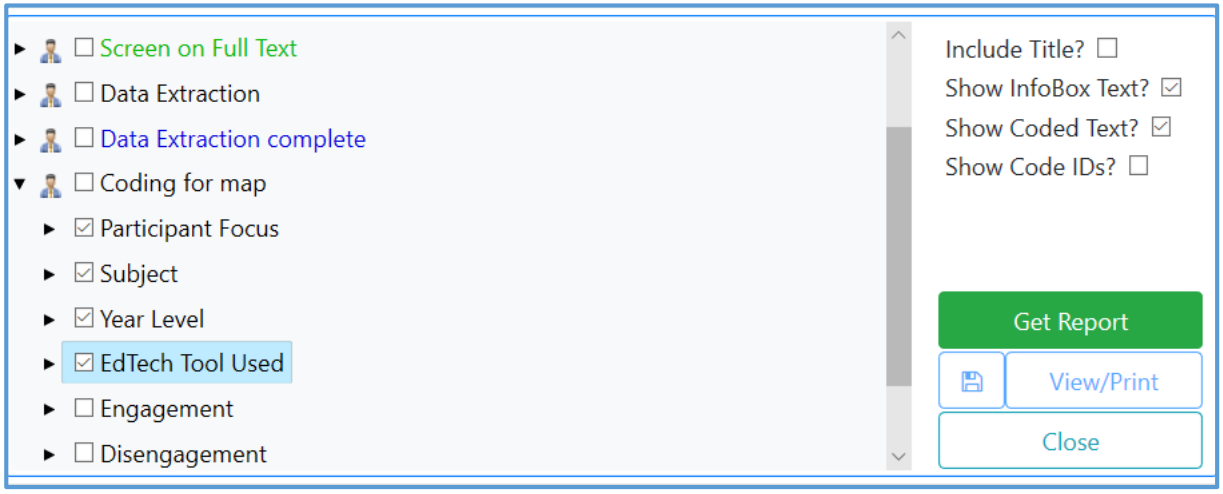
Video: https://youtu.be/iGXgpb4bwFg

Quick Question Reports – ER Web



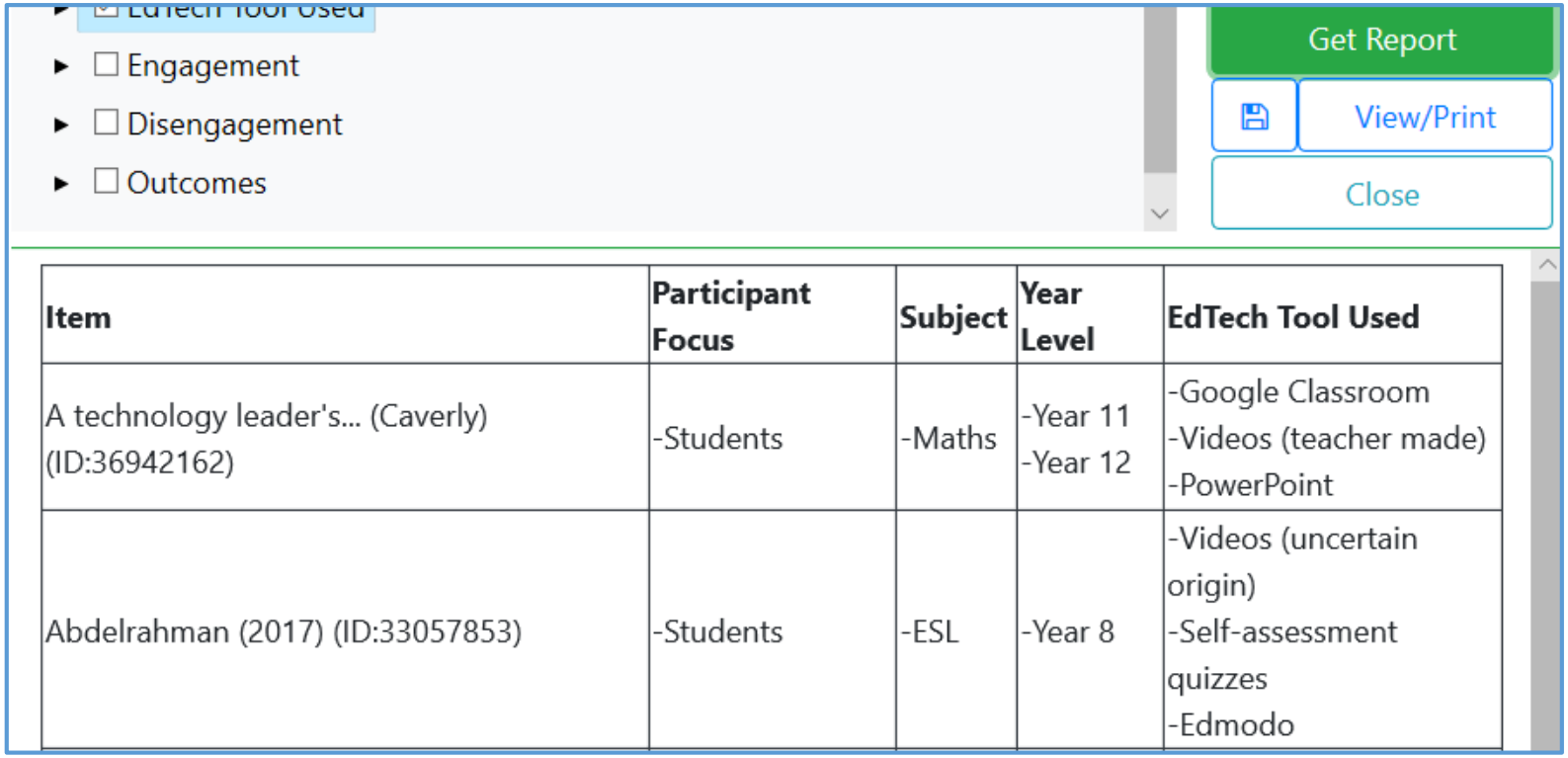
Similar to a configurable report in ER4.

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.

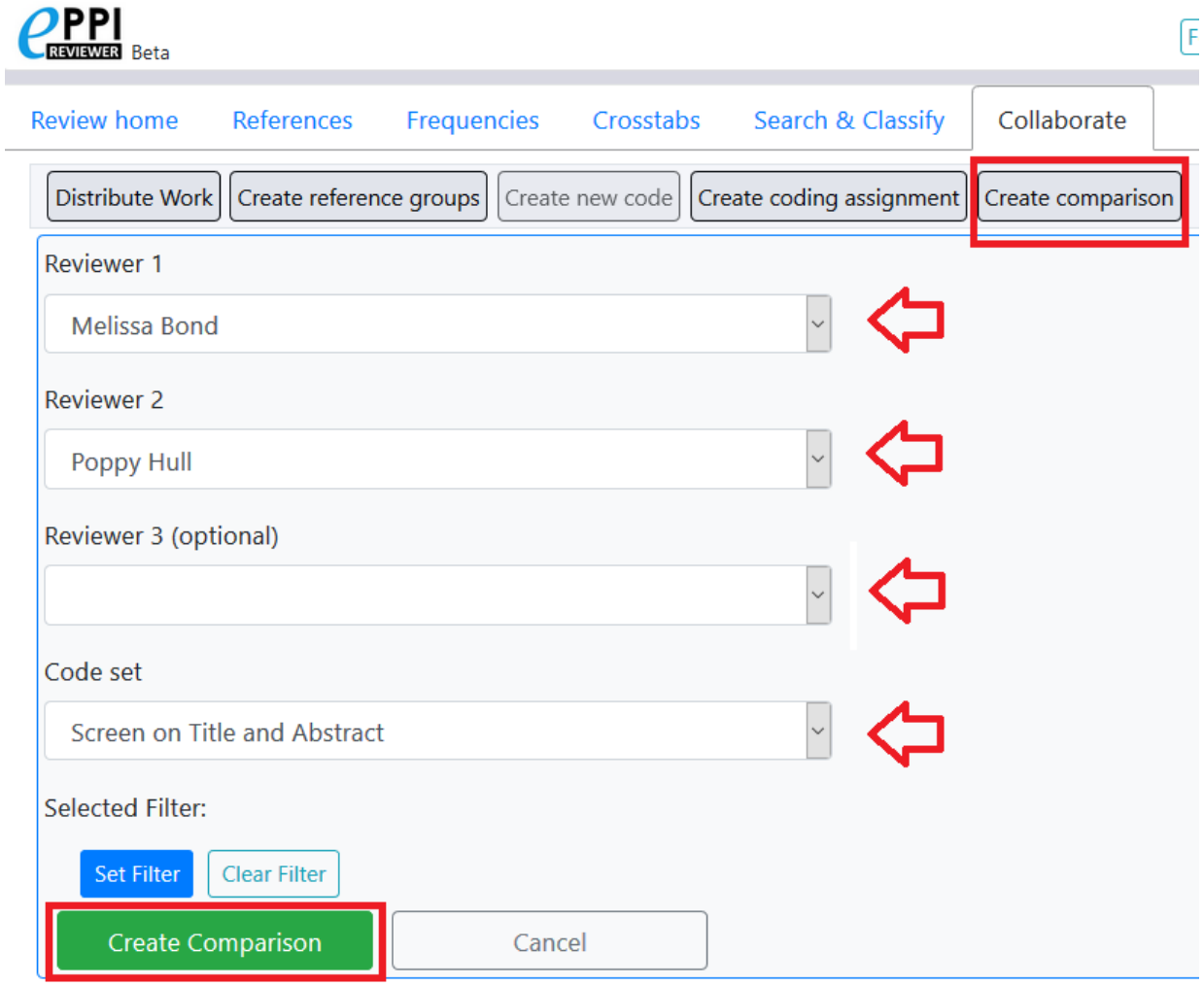
Clicking View/Print will open it in a new tab.

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

Comparison Reports

After double screening/coding, you will need to create a comparison report to reconcile differences and agreements between your review team.

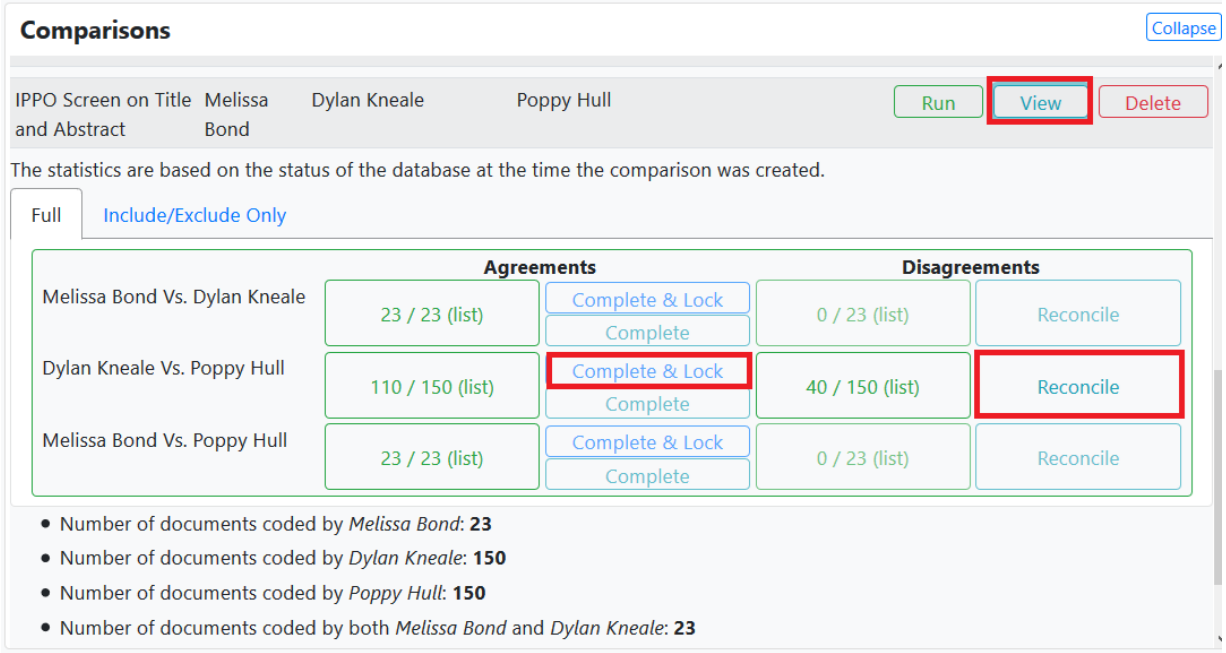


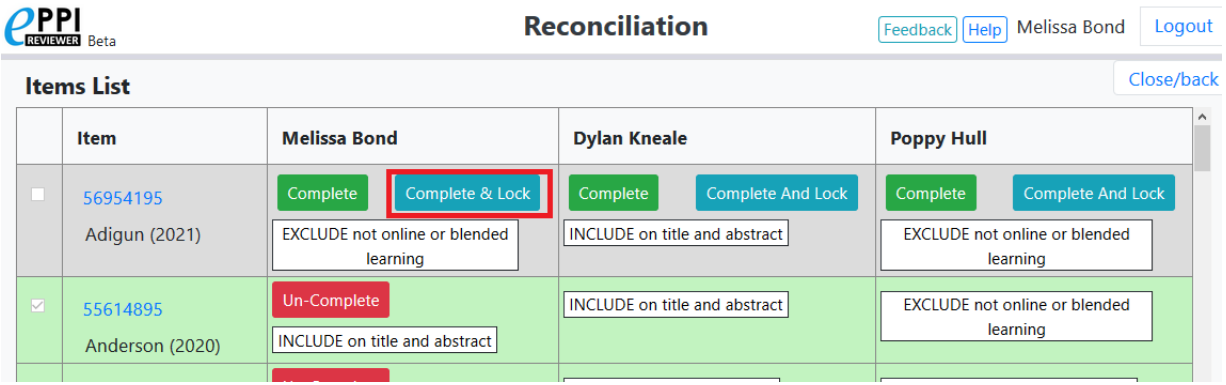
1. In the Collaborate tab, click on 'Create comparison.
2. Choose the reviewers to compare.
3. Choose the code set (coding tool).
4. Optional: Select a code to filter the report by.
5. Click on 'Create Comparison'.

Video: https://youtu.be/2I1BmGBmLqs

Comparison Reports

Scroll down to the bottom to the Comparisons section and click on ‘View’ on the report.



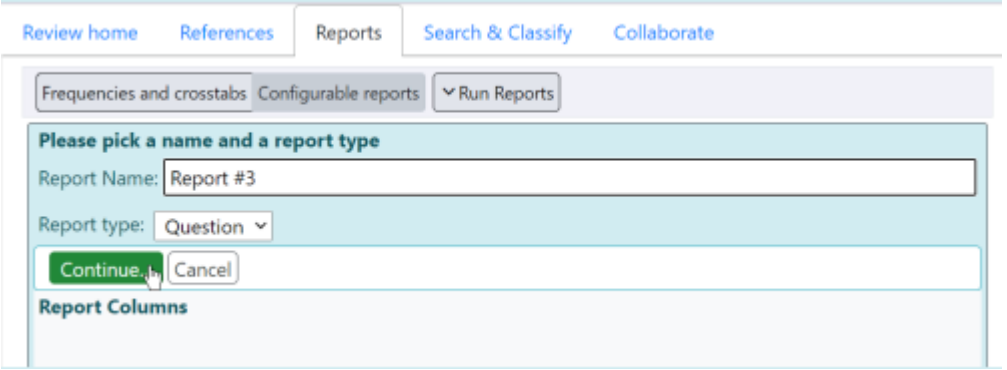


1. Click on ‘Reconcile’ under Disagreements.
2. Go through the list of disagreements between you, and choose whose coding decision is correct for each item.
   - ➢ Complete reconciliations will go green.
3. Click on ‘Close/back’.
4. Complete your agreements.

Video: https://youtu.be/2I1BmGBmLqs

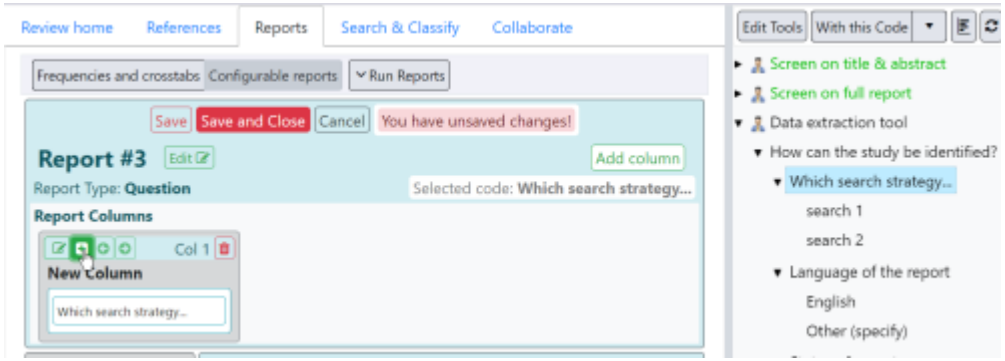
Configurable Report

1. In the Reports tab, click on ‘Configurable reports’.
2. Click on ‘New Report’, give it a name and choose whether it will be a Question or an Answer report.



- A question report summarises all of the codes below a parent code.
- An answer report displays an individual code’s responses.

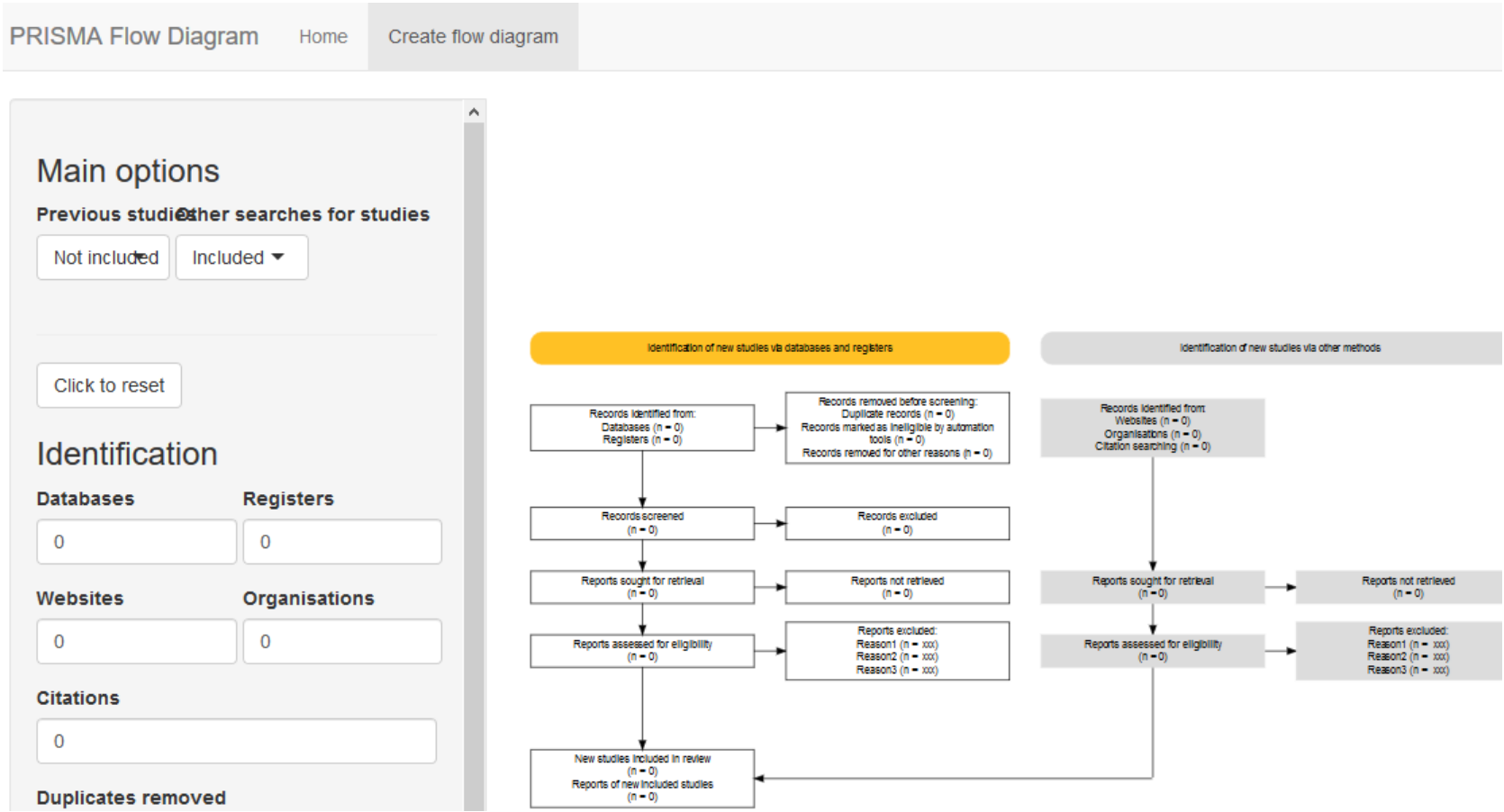
3. To add a column, click the Add column button.
4. To add a code or codes to a column, select the code from the code panel and click the ‘+’.
5. To run the report, click on ‘Run Reports’ and choose your report where it says ‘Report Name’.



PRISMA flow diagram

Created by Neal Haddaway and Luke McGuiness.

https://estech.shinyapps.io/prisma_flowdiagram/



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.
- ❑ Single and double screening.
- ❑ Creating coding assignments.
- ❑ Line-by-line PDF coding.
- ❑ Applying the Exclusion flag / Officially excluding items
- ❑ Generating reports and creating PRISMA diagrams.
- ❑ EPPI-Visualiser and EPPI-Mapper
- ❑ Any other questions?

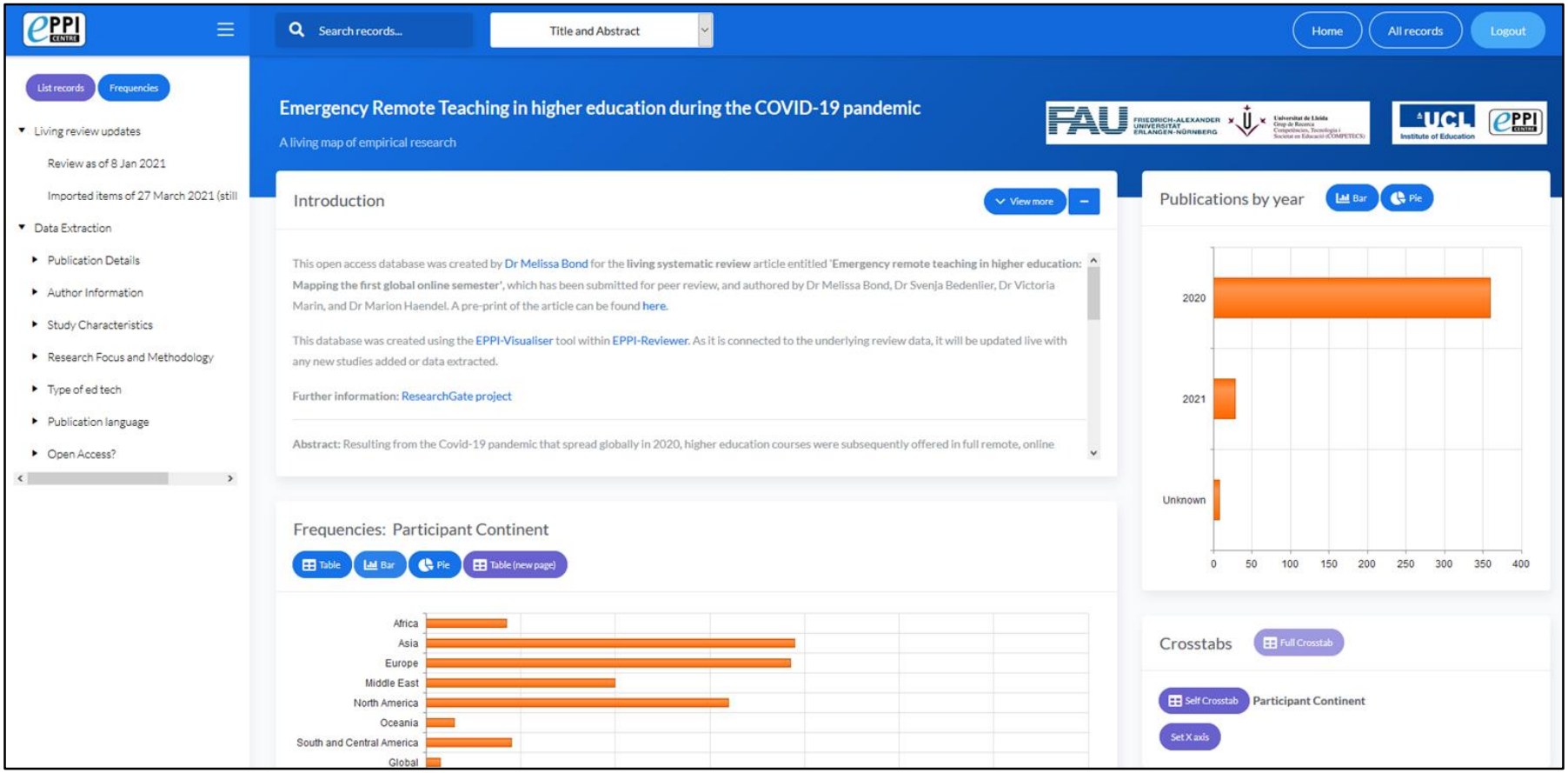
EPPI-Visualiser: https://youtu.be/bhQuGpeB2Lo

EPPI-Mapper: https://youtu.be/nW353pA75io

What is EPPI-Visualiser?

EPPI-Visualiser is a new web database tool, displaying the studies and coding conducted in your review.

- Any changes made in your review are updated live in the database.

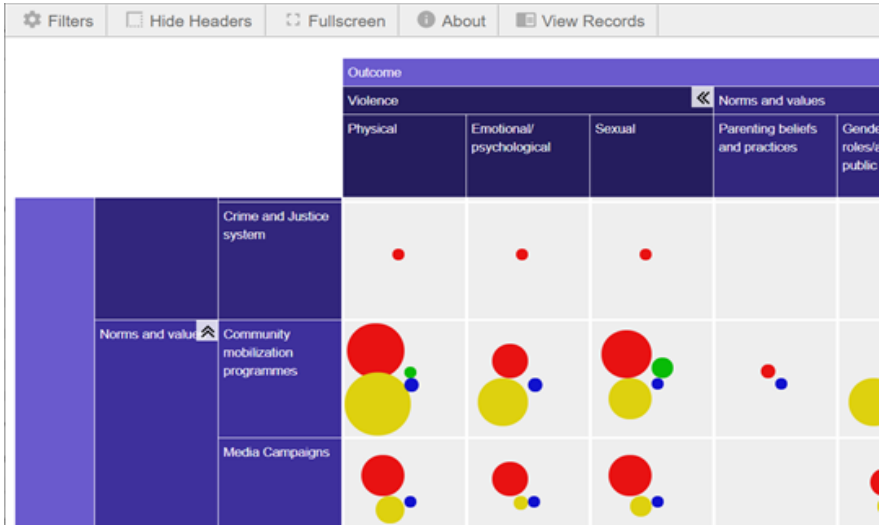


Video: https://youtu.be/bhQuGpeB2Lo

Source: https://t.co/EXPXjvHXgn?amp=1

What is EPPI-Mapper?

- An application to create interactive evidence gap maps (EGMs).
- Developed by the EPPI-Centre in partnership with the Campbell Collaboration.
  - First version was created in early 2018.
- Requires studies to be coded in EPPI-Reviewer.
- Designed for flexibility.
- Has many options for changing the appearance of the map.
- User has full control of branding.
- Exists as a standalone HTML file.



http://eppimapper.digitalsolutionfoundry.co.za/#/

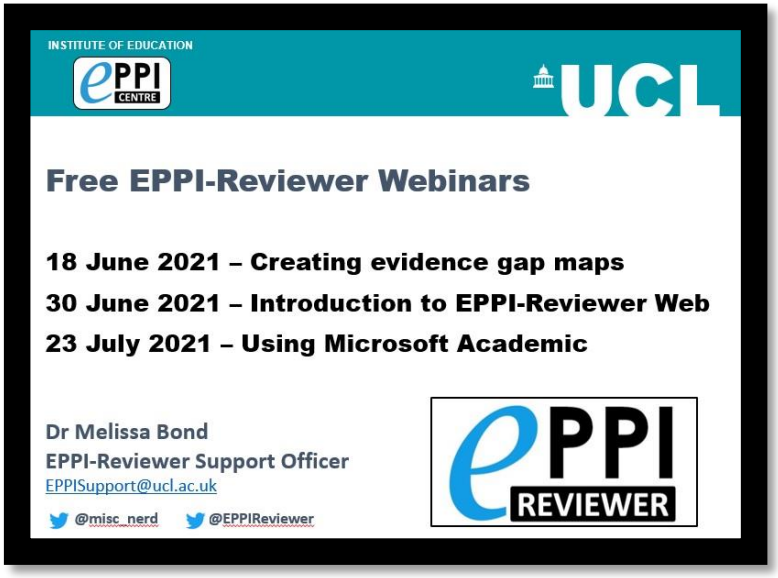
Professional development

How to use MAG Browser in EPPI-Reviewer Web

- Free online webinar
- Tuesday, 6th July 2021
- 2pm-4pm (BST)
- Get in touch with Mel via email for the link

Scoping reviews, mapping reviews and evidence gap maps

- Online course – the University of Sheffield
- Wednesday, 7th July 2021
- Time TBA
- More info and registration here



Using Microsoft Academic in EPPI-Reviewer Web

- Free online webinar
- Friday, 23rd July 2021
- 11am-12pm (BST)
- Register here

Q & A / Discussion

Do you have any specific questions?

Further information

- EPPI-Reviewer homepage – sign up to a free one month trial.
- EPPI-Reviewer Web
- EPPI-Mapper information – includes links to example maps.
- EPPI-Mapper app
- Recorded webinar on using EPPI-Reviewer and EPPI-Mapper to create interactive evidence gap maps.
- EPPI-Reviewer instructional video on interactive evidence gap maps.
- EPPI-Reviewer instructional video on how to create an EGM using EPPI-Mapper.
- Information about using Microsoft Academic Graph within EPPI-Reviewer.
- Schools and emergency remote education during the COVID-19 pandemic – information and interactive evidence gap maps.
- Schools and ERE during the COVID-19 pandemic – article.
- Mapping the field of emergency remote teaching in higher education due to COVID-19