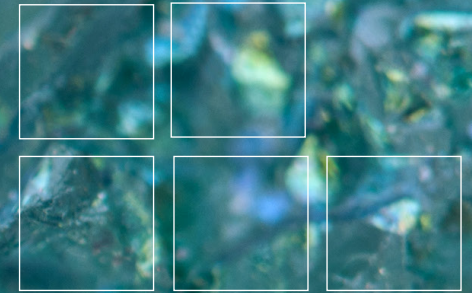# Crystallise Evidence Mapper

Screener User Guide – Creating a New Project

1. Creating a New Project

From the landing page, click on **Create a new Project** [Figure 1, C1]. A New Project page will appear [Figure 2].
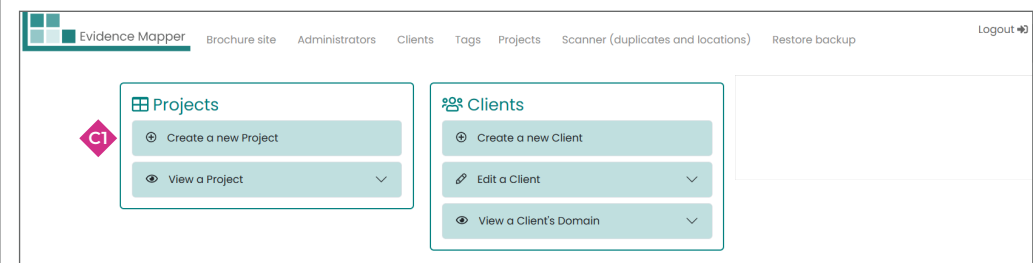

Figure 1 Landing page

2. Setting up a New Project

Step 1: Project details

Fill in your internal project name [Figure 2, N1] and select the client [Figure 2, N2] for the new project.

Step 2: Adding users to the Project

To assign a user to the project, search for their name [Figure 2, N3] in the System Users box, and click on the "Add to Project" button [Figure 2, N5] next to their name.

Select the roles for each user in the "Users on Project" box [Figure 2, N6]. Descriptions of the roles are given below the table.

To remove user from the project, click on the "Remove from Project" button in the System User box [Figure 2, N4] or in the Users on Project box [Figure 2, N7].

Once all the details for the project are filled in, click on the "Screen Abstracts" button to manage the content and screening [Figure 2, N8].
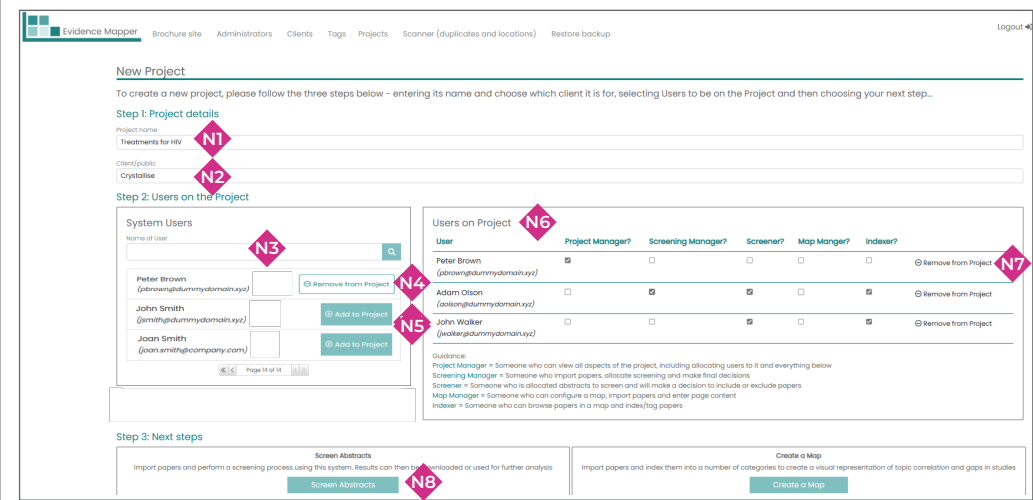

Figure 2 New project set-up

3. Setting up Screening Project

Step 1: Importing papers to a Project

File import
There are several import options available. Each imported file needs to have a name so you can track the source of each paper in the project [Figure 3, 13].

- If you have a list of papers in an Excel spreadsheet, you can import these as a .csv file [Figure 3, 11]. You can download a template showing the column headings needed [Figure 3, 12]. More information on uploading a .csv file on next page.

- If you want to upload the results of a database search, you can import this as a .ris file [Figure 3, 14] or as an .nbib file [Figure 3, 15].

- You can also upload a list of citations as a 'javascript object notation' (JSON) string [Figure 3, 14].

Manual import
- If you just want to add details of a small number of papers, such as reports and other publications from the internet, you can add a paper manually [Figure 3, 16].

Import from other projects
- You can also import papers from an existing project [Figure 3, 17]. More information on the next page.

Once you have imported all files/papers, click on the "Continue to deduplication process" button [Figure 3, 18] to proceed to next step.

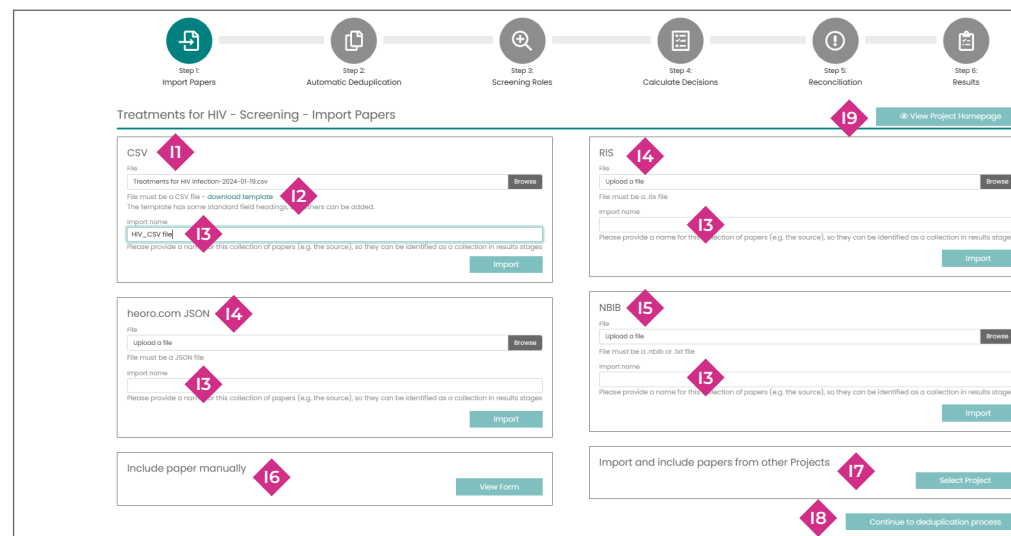Click on the Project Homepage button [Figure 3, 19] at any time to go back to the main project menu.

Figure 3 Import papers

CSV File import

When importing a CSV file, the Import CSV page allows you to match the column headings in your file [Figure 4, V1] with those the Evidence Mapper is expecting [Figure 4, V2].

- Only the Title and Year fields are required to proceed with import. The Year must be a 4-digit number.

Once completed, click on the "Import" button [Figure 4, V3].

Manual paper import

For a manual import, the full citation [Figure 5, M1], Authors [Figure 5, M2] and Title [Figure 5, M3] are essential details but other fields are optional.

The paper must also be given a file Import name, by either selecting an existing file Import group (Import*) [Figure 5, M4] or by creating a new Import group (Other) [Figure 5, M5].

Once completed, click on the "Save" button [Figure 5, M6].

Import from existing project

To import papers from an existing project, select the project name [Figure 6, P1] and the best field to help you select relevant papers [Figure 6, P2], then click on the "Show tags" button [Figure 6, P3].

A "Tags" box will appear with a list of all tags used for your selected field [Figure 6, P4].

Click on the toggle button next to the name of the tag or tags that have been applied to the papers you want to import into your new project. Once completed, click on the "Import papers that have any of these tags" button [Figure 6, P5].
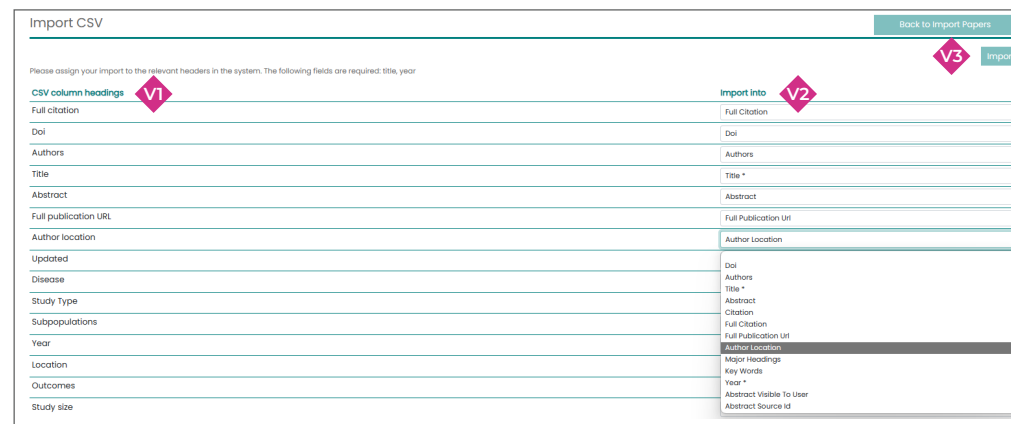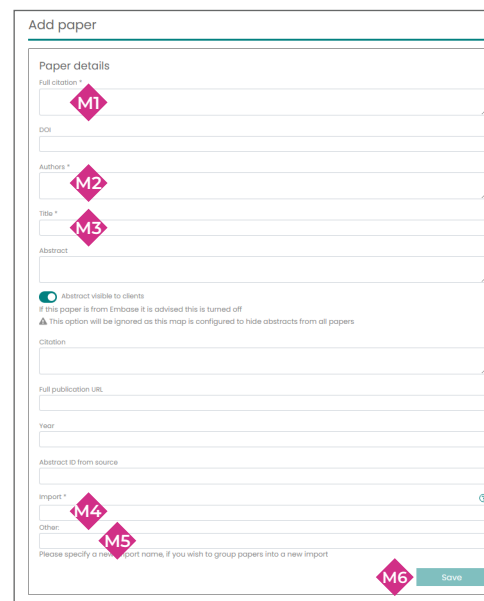
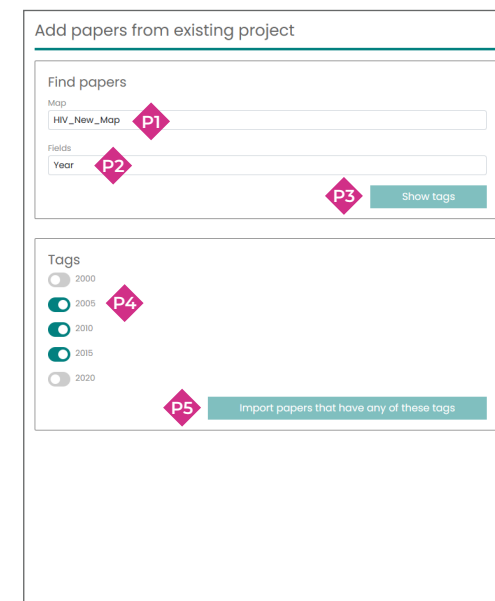Figure 4 Import CSV file

Figure 5 Manual paper import

Figure 6 Import paper from existing project

Step 2: Importing papers to a Project

Deduplication initialisation

The imported papers need to be deduplicated to set them up for screening.
To initiate the process, click on the "Run Deduplication Process" button on the Automatic Deduplication page [Figure 7, D1].

Depending on the number of imported papers, deduplication process may take several minutes to complete. During this time you cannot work on the project.

Once completed, you will be shown how many duplicate entries have been identified. These will not appear in the list for screening.

To proceed to the next step, click on the "Continue to Screening Roles" button that will appear at the bottom of the screen.
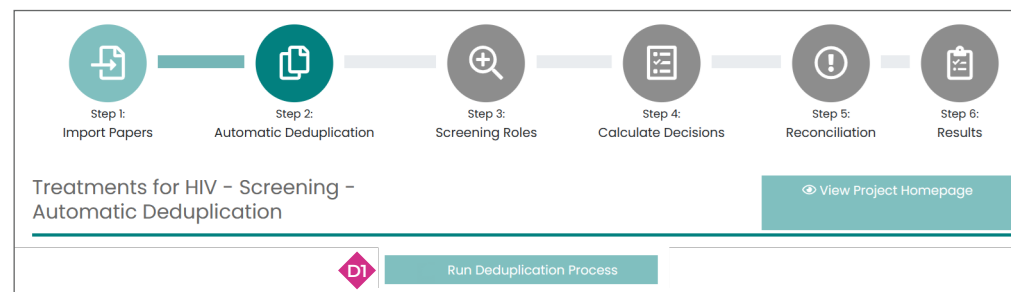

Figure 7 Deduplication

Step 3: Screening roles

Screeners on Project

The "Screeners on Project" box shows everyone who has been given a screening role. If you wish to update users or permissions on the project, click on the "Manage users…" button [Figure 8, R4].

Screening allocation

To assign Papers to screen, enter the desired papers range for each screener [Figure 8, R2], using following format:

- {number}-{number},{number}-{number}…

For example, for each user, you may assign:

- Full range (for 203 papers): 1-203

- Single paper (e.g., for Paper 1): 1-1

- Custom range (first 100 and last 100 papers): 1-100, 103-203

To confirm screening allocation, click on the "Save changes" button [Figure 8, R3].

Screening progress

Screening Managers and Project Managers can review the screening progress in the "Progress Tracker" box [Figure 8, R1], with summary results for each user assigned to the project.

Screening Managers and Project Managers can reconcile screening conflicts at any stage of the screening process by clicking on the "Continue to Calculate Decisions" button [Figure 8, R5].
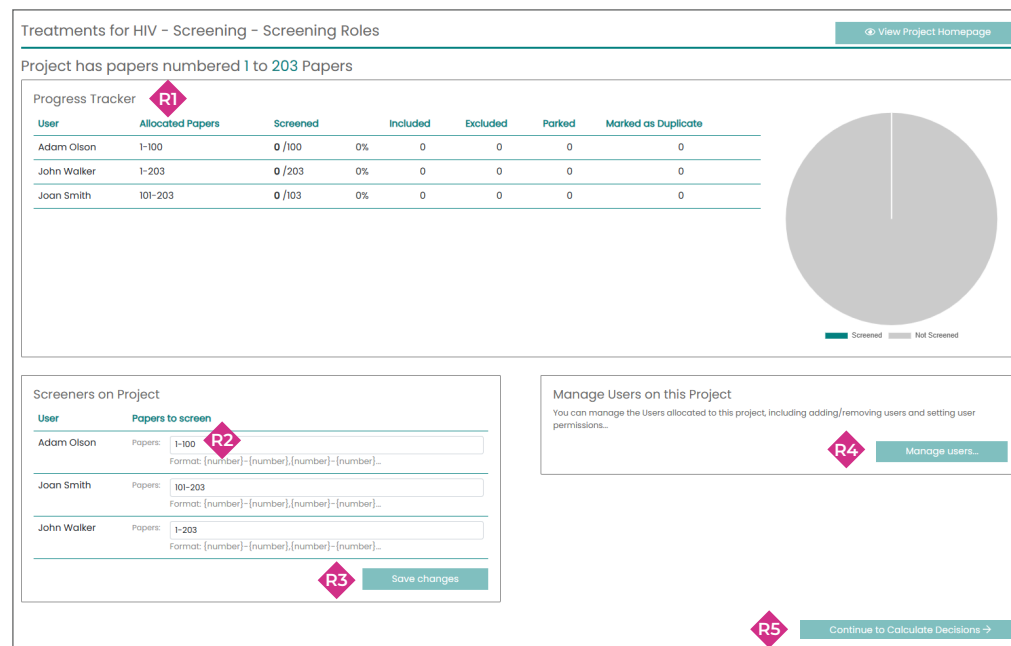
Figure 8 Screening roles

Step 4: Abstract screening

Click on Screen Abstracts from the Project Homepage [Figure 9, S1] to see the abstract screening page.

The details of each abstract are shown on the left of the screen [Figure 9, S7]. The fields with screening decisions are shown on the right of the screen [Figure 9, S8]. Switching to Fullscreen mode [Figure 9, S5] makes it easier to see all the abstract content for screening.

You can assign your screening decision to each abstract by selecting one of available options in the "Your Screening decisions" box [Figure 9, S8]. You may Include [Figure 9, S10] or Exclude [Figure 9, S11] each abstract, mark it as a Duplicate [Figure 9, S12], or Park it if you are not sure what the decision should be and want to come back to it later [Figure 9, S13].

You may add notes, such as to index different categories of included or excluded paper or explain your reasoning, [Figure 9, S9], but it is best to do this before clicking on your screening decision box, because this will automatically make your next allocated abstract appear.

You can navigate around the abstracts either by clicking on the Previous paper [Figure 9, S2] and Next paper [Figure 9, S4] buttons or by using the left and right arrow buttons on your keyboard. You can also navigate through the abstract by selecting the abstract number you want to view [Figure 9, S3]. If you have screened some abstracts for this Project previously and want to carry on from where you were, click on Jump to last viewed paper [Figure 9, S6].
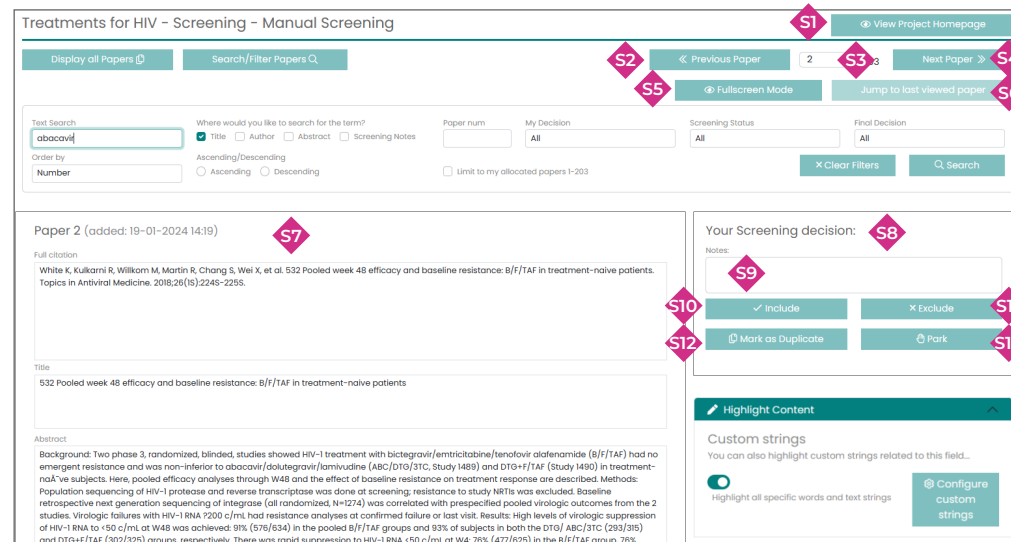

Figure 9 Screening roles

Abstract screening

To find a specific abstract:

- If you know the abstract number within your Project (e.g. abstract 45 of 207), click on the box [Figure 10, S3] and enter the paper number. Please note that this number will change depending on how you have ordered the abstracts.

- To search for a specific abstract by Paper ID, which does not change, click on Search/Filter papers [Figure 10, S15], add the abstract number to the Paper num box [Figure 10, S18] and click on the Search button [Figure 10, S23].

- To search for abstracts containing specific text, add the characters you want to find in the Text search box [Figure 10, S16], and click to specify if these are in the title, the author's name, the abstract text or the notes field [Figure 10, S17], then click on the Search button [Figure 10, S23]. To search across all fields, leave these blank.

- To find abstracts that have a specific screening decision, click on the "My decision" dropdown [Figure 10, S19], select the decision to view, then click on the Search button [Figure 10, S23].

- To filter abstracts by screening status, click on the "Screening Status" dropdown [Figure 10, S20], select to view Unscreened, screened by me, or screened by one or two others, then click on the Search button [Figure 10, S23].

- To filter abstracts by Final Decision, click on the "Final Decision" dropdown [Figure 10, S21], select the decision to view, then click on the Search button [Figure 10, S23].

- To go back to the full list of abstracts, either click on Clear Filters [Figure 10, S22], or on Display all papers [Figure 10, S14].

Figure 10 Screening page

Content Highlight

You can colour selected terms in the title and abstract to make it quicker and easier to screen.

Click on the Highlight Content button [Figure 10, S24] then click on Configure custom strings [Figure 10, S26].

Click on the + sign to add a colour [Figure 11, H1]. Click on the black box that appears [Figure 11, H3] or enter the required colour ID (HEX format) [Figure 11, H2] or RGB format [Figure 11, H6] to select a colour for text highlighting.

- To highlight text strings that are whole words, add the string to the first box [Figure 10, H4]. This is useful if you want to highlight an abbreviation but not any other words that also contain that string of characters. For example "MI" will only be highlighted if it exists as an abbreviation but "might" will not be coloured. Enter each text string on a separate row.

- To highlight text within a word where there could be several variants, add the characters to the second box [Figure 10, H5]. For example, adding "diabet" will mean that "diabetes", "diabetic" and "diabetologist" will all be partly coloured. Enter each text string on a separate row. You can colour different sets of words with different colours, by clicking on the + that appears at the top of the Text highlighting window. Then click on Save [Figure 10, H8].

- To highlight the selected words, toggle on the Highlight all specific words and text strings button [Figure 10, S25].

- To remove specific content highlight, select the colour you want to remove and then click on "Remove Colour" [Figure 10, H7].
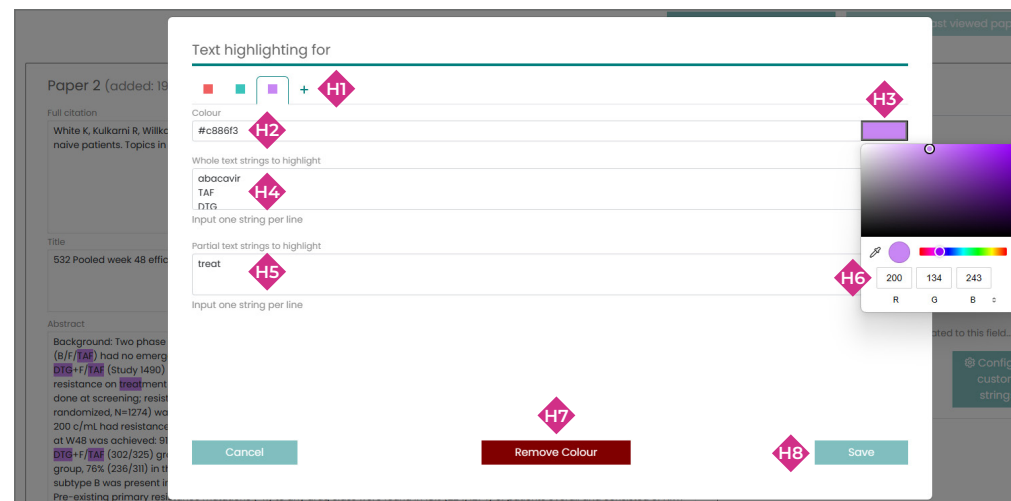

Figure 11 Content Highlight Setup

Step 5: Calculate Decisions

Select papers to calculate Final Decisions

From the "Papers without final decision" panel [Figure 12, X1], select the papers group for which you want to calculate decisions. You may select papers screened once [Figure 12, X2], twice [Figure 12, X3], 3+ times [Figure 12, X4], or select multiple groups as desired.

Calculate Final Decisions

After selecting the papers group(s), click on the "Calculate X final decisions" button [Figure 12, X5].

Final Decisions

The summary of final decisions will appear in the "Final decisions to date" panel, with the number of abstracts included, excluded, marked as duplicate or disagreement [Figure 12, X6].

- Disagreement includes papers for which the screening decisions differ between screeners, or papers that have been indexed by one or more screener as "Park".

These papers can be reconciled by the Screening Manager or Project Manager to determine the final screening decision.

To proceed to next step, click on the "Continue to Reconciliation" button [Figure 12, X7].
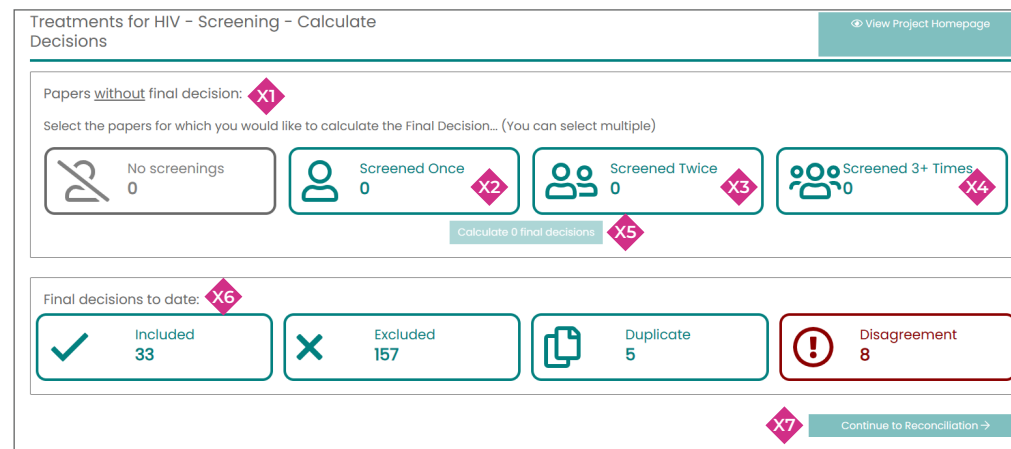

Figure 12 Calculating decisions

Step 6: Reconciliation

Reconciliation Page

The reconciliation page displays the details of papers where screeners have disagreed or parked a paper.

Screening History

Decisions made by screeners are displayed in the "Screening History" box [Figure 13, Y1], with user details, decision made, date and user notes (if provided).

Reconciliation

To resolve disagreement for the displayed paper, select the relevant Final decision box [Figure 13, Y3].

- You can add additional information in the "Notes" box [Figure 13, Y2], but this must be done before selecting the Final Decision, as clicking the decision box will automatically move you to the next paper to be reconciled.

Once the disagreements for all papers are resolved, no more papers will be displayed.

You are still able to Search/Filter for papers with specific Final Decisions from the Search/Filter Papers panel [Figure 10, S21].

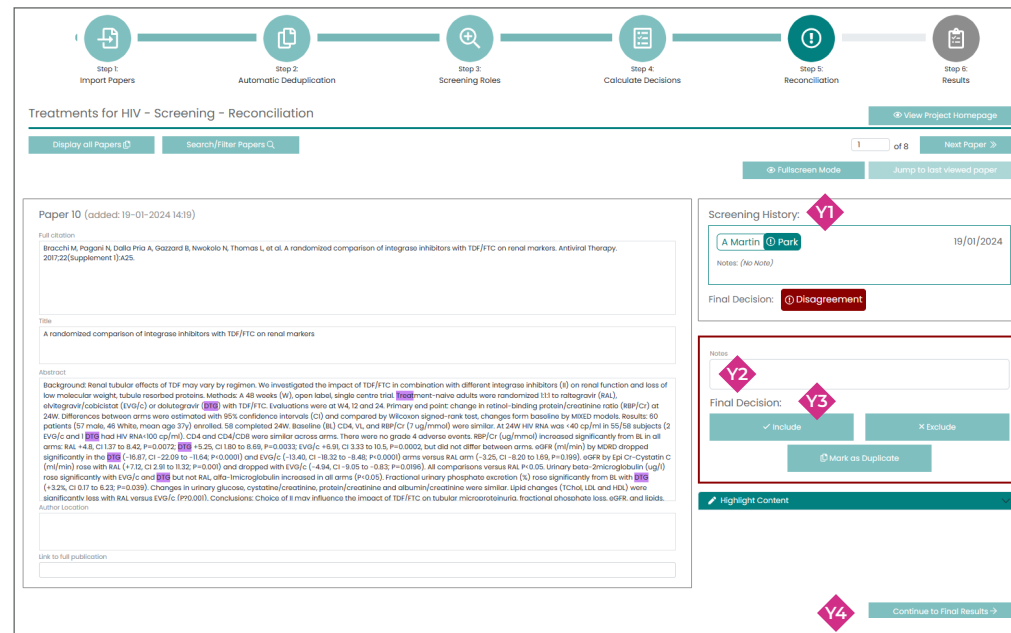To proceed to the next step, click on the "Continue to Final Results" button [Figure 13, Y4].

Figure 13 Reconciliation screen

Step 7: Final Results

Final Decisions

The summary on final screening decisions is displayed in the "Final decisions to date:" panel [Figure 14, **Z1**].

To display results by import name, click on the "View Breakdown By Import" button [Figure 14, **Z2**]. A detailed breakdown will appear in a new table.

Exporting Results

You can export the screening results at any stage of the process as:

- Included papers only (either .csv format [Figure 14, **Z3**] or .ris format [Figure 14, **Z4**]), or

- All papers (either .csv format [Figure 14, **Z5**] or .ris format [Figure 14, **Z6**])

The .csv format will export details of each paper including the final screening decision, source of the paper and any notes that have been added to that paper.

Next Steps

- Import more papers: click on the "Import more papers to screen" button [Figure 14, **Z7**]. You will be taken to the "Step1: Import papers" stage [Figure 3]. After importing new papers, you will need to follow all the steps again, starting from deduplication, to make the new papers visible for screening.

- Create a Map: papers screened as includes may be imported into an Evidence Map for the project by clicking on the "Create a Map" button [Figure 14, **Z8**]. You will be directed to the Map set-up page.
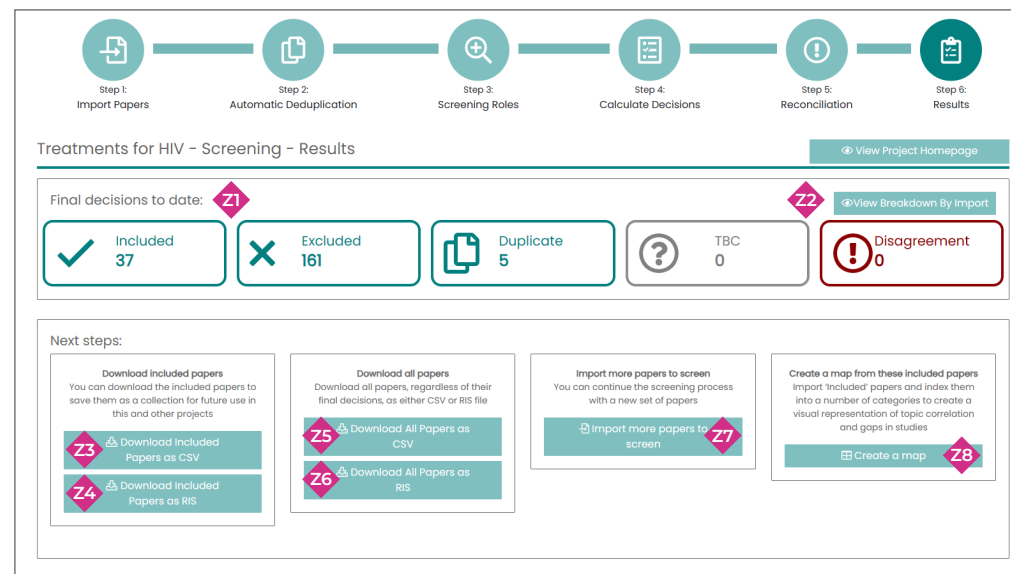

Figure 14 Results page