

Importing Structured Data from DistillerSR into SRDR

Introduction

The purpose of this document is to provide step-by-step instructions for the process of importing structured data from DistillerSR into the Systematic Review Data Repository (SRDR). Note that this feature is only available in the newest version of SRDR, i.e., SRDR+. However, for simplicity purposes and to be consistent with the rest of this report, this Appendix uses the term SRDR.

There are three main steps to the process of importing structured data from DistillerSR into SRDR. These steps assume that the user has access to the relevant project in DistillerSR. However, if the user does not have access to Distiller, simply having access to the Section files is sufficient, in which case, the user should proceed directly to Step 3.

The steps described in this document are intended to apply to the end of the process of data extraction in a systematic review, once the data are already extracted in DistillerSR. Currently, once the data are imported into SRDR, we have not yet developed interoperability in the opposite direction (i.e., importing of data extracted in SRDR into DistillerSR).

Clarification of Terms

Before we proceed with describing the steps involved with the importing process, we provide below some explanations/definitions of terms:

- Section - Data extraction forms in SRDR are organized into sections. Also known as a *tab*, each section refers to a collection of questions/items in the data extraction form.
- Section File - This is a file that is exported from DistillerSR that will ultimately be imported into a corresponding section in SRDR.
- Level - DistillerSR allows users to collect study data in phases, called *levels*. Each level either contains a form to be filled, or multiple *sub-levels*. When importing into SRDR, each level is mapped to an extraction form section.

Limitations of Current Importing Options

One limitation with current importing options is related to differences in how DistillerSR and SRDR collect and store systematic review data. For example, SRDR projects contain structured elements such as outcomes, populations, and comparisons that have no counterpart in DistillerSR. This incompatibility makes it difficult to create a fully formed SRDR project by interpreting data exports out of DistillerSR. Instead, when importing data, SRDR creates a barebones version of the project that contains none of the structured element, such as outcomes or comparisons. Rather, SRDR imports each DistillerSR file into a separate data extraction form section, where the data contained in the file are represented as question-answer

pairs. The names of the imported extraction form sections are the choice of the user importing the project.

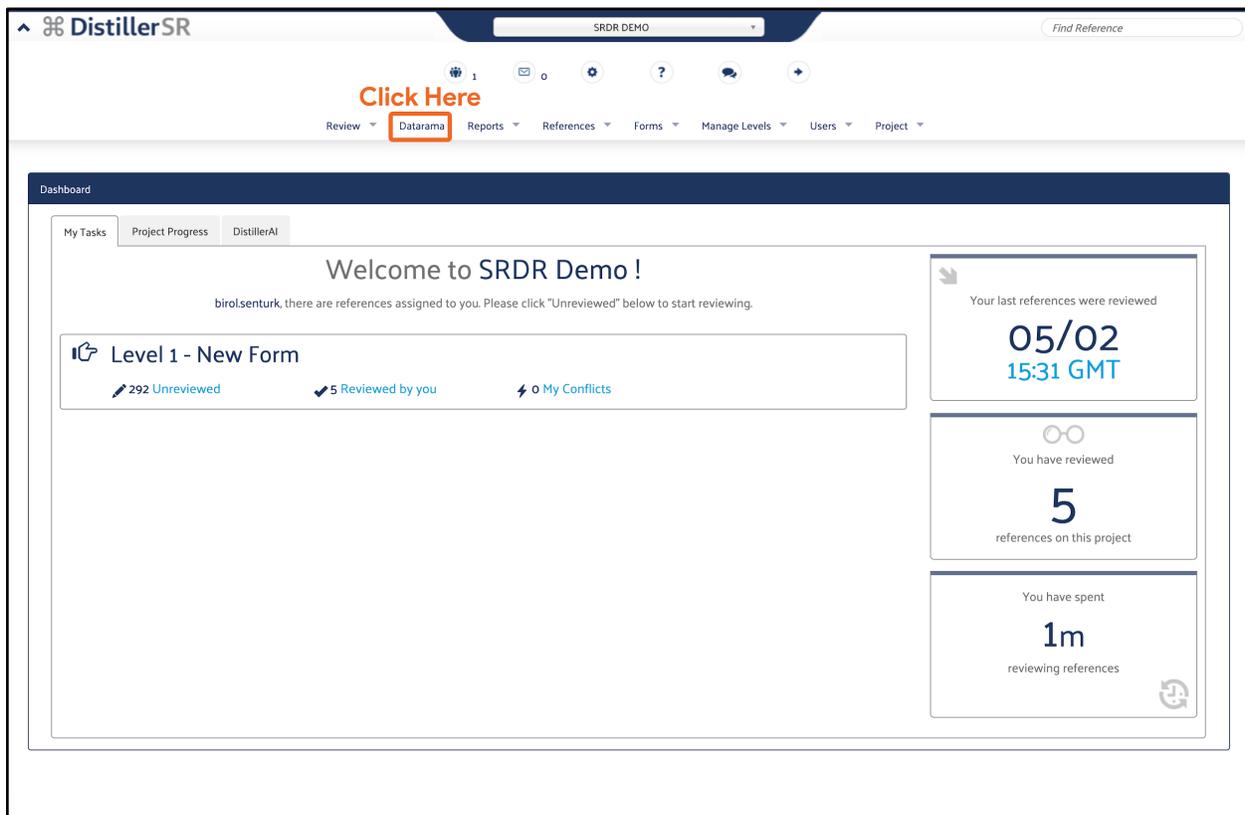
It should also be noted that once a project is imported, additional DistillerSR files cannot be imported subsequently into the same project. Therefore, we strongly recommend that the user export all the data out of DistillerSR and only then begin the import process into SRDR.

Steps of importing structured data from DistillerSR into SRDR

Step 1 of 3 - Exporting a File Containing Study References from DistillerSR

1. Go to the **DistillerSR** Home Page.
2. Log into your account.
3. Use the dropdown at the top of the page to select the project to be exported.
4. In the top bar, click on **Datarama** (**Figure i**).

Figure i



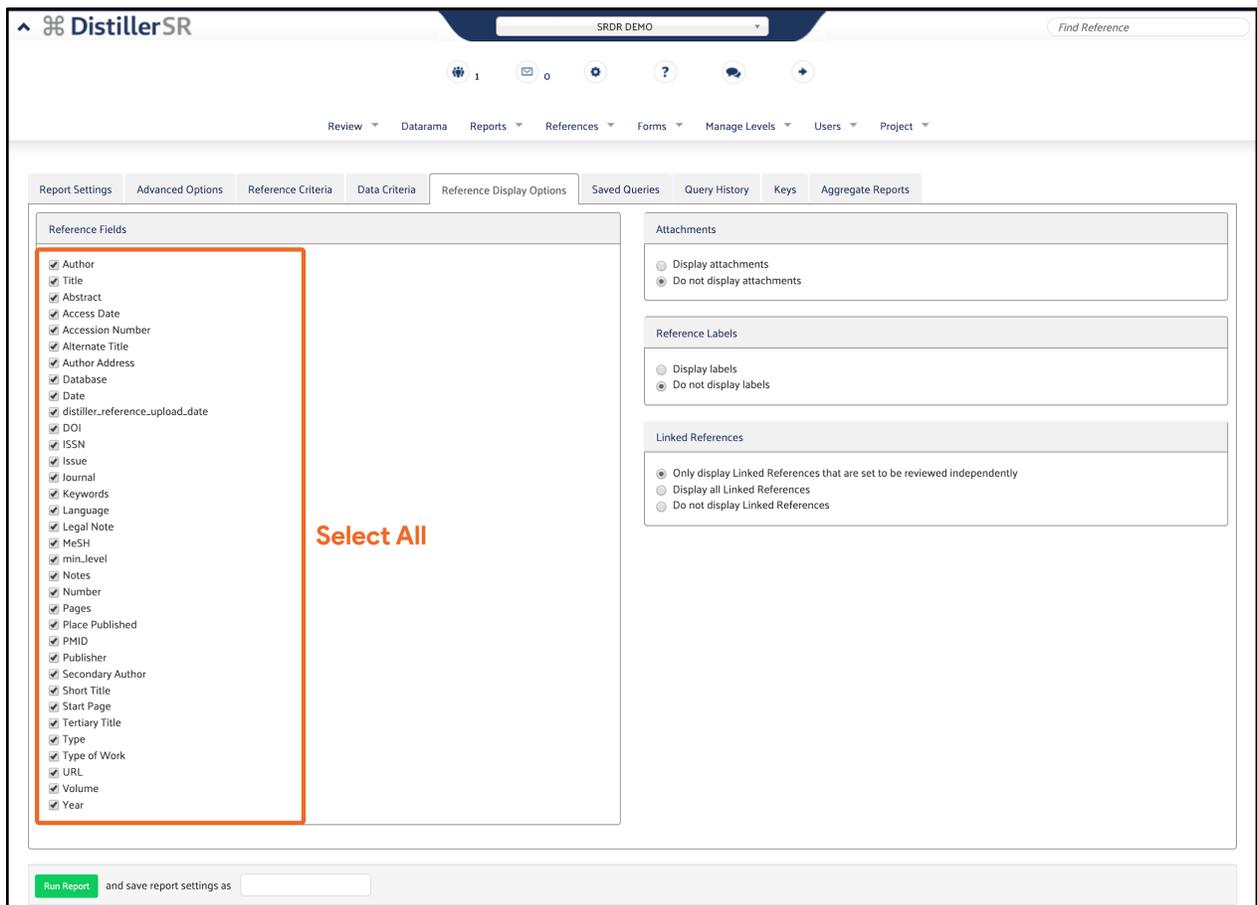
5. Click on the **Report Settings** Tab:
 - a. Under the **Basic Options** panel (**Figure ii**):
 - i. From the **Report Format** dropdown, select the **RIS** option.
 - ii. *This step is optional* - Enter a filename for the export into the textbox labeled **Export File name (optional)**.
 - b. Under the **Data to Display** panel (**Figure ii**):
 - i. Ensure that none of the checkboxes are checked.

- c. Click on the **Reference Display Options** Tab and under the **Reference Fields** panel:
 - i. Ensure that all checkboxes are selected (**Figure iii**).
6. Click on **Run Report** at the bottom left of the page to start the export.

Figure ii

The screenshot displays the DistillerSR web application interface. The top navigation bar includes the logo, a search bar with 'SRDR DEMO', and a 'Find Reference' button. Below the navigation bar are several tabs: Report Settings, Advanced Options, Reference Criteria, Data Criteria, Reference Display Options (selected), Saved Queries, Query History, Keys, and Aggregate Reports. The 'Basic Options' section is highlighted with orange boxes around the 'Report Format' dropdown (set to 'RIS') and the 'Export file name (optional)' text box (containing 'sdr.citations'). Red annotations read 'Select "RIS"' and 'Enter a file name'. The 'Data to Display' section shows 'Level 1' selected. At the bottom, there is a 'Run Report' button and a text input field for saving report settings.

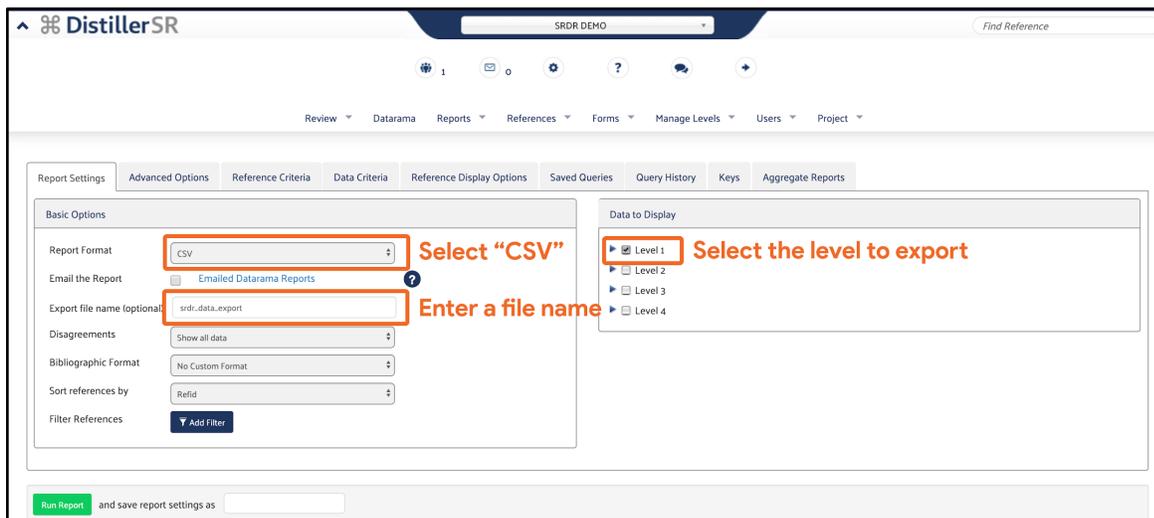
Figure iii



Step 2 of 3 - Exporting *Section File(s)* from DistillerSR

1. Go to the **DistillerSR** Home Page.
2. Log into your account.
3. Use the dropdown at the top of the page to select the project to be exported.
4. In the top bar, click on **Datarama**.
5. Go to the **Report Settings** Tab:
 - a. Under the **Basic Options** panel (**Figure iv**):
 - i. From the **Report Format** dropdown, select the **CSV** option.
 - ii. Enter a filename for the export into the textbox labeled **Export File name(optional)**. *This step is optional.*
 - b. Under the **Data to Display** panel (**Figure iv**):
 - i. Click on the checkbox next to the level you want to export.
 - ii. Ensure that only one checkbox is selected.

Figure iv

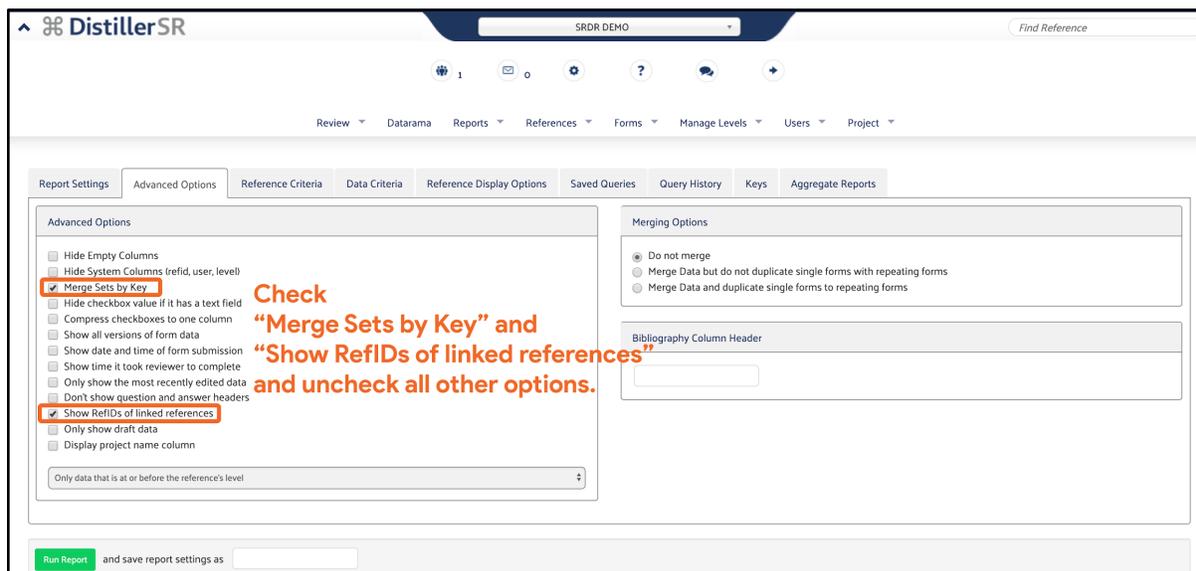


6. Go to **Advanced Options** Tab:

a. Under the **Advanced Options** panel (Figure v):

- i. Click on the checkbox labeled **Merge Sets by Key**.
- ii. Click on the checkbox labeled **Show RefIDs of linked references**.
- iii. Ensure that none of the other checkboxes are checked.

Figure v



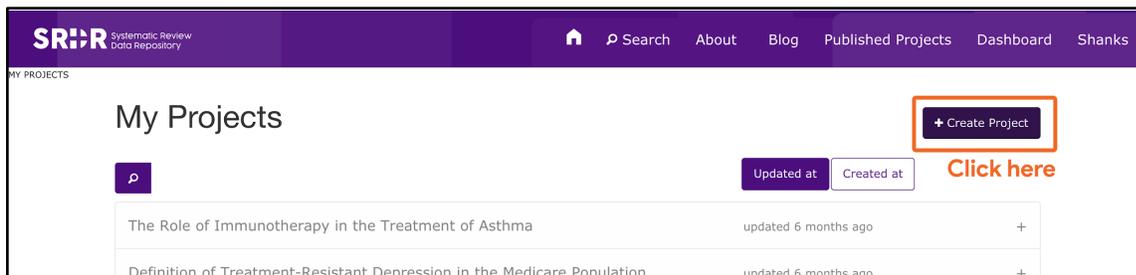
7. Click on **Run Report** at the bottom left of the page to start the export.

8. Repeat steps 1 through 8 until all the desired *levels* are exported as section files.

Step 3 of 3 - Importing the References File and Section File(s) into SRDR

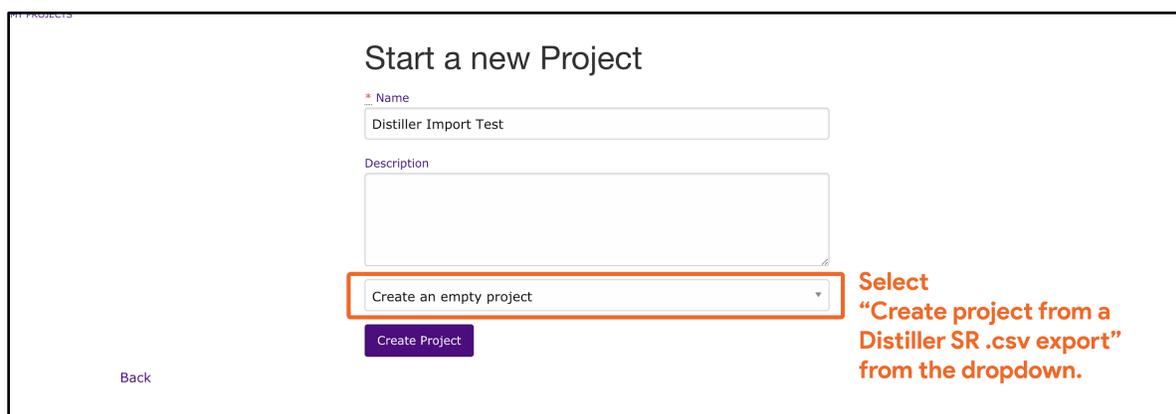
1. Go to the **SRDR Home Page** (<https://srdplus.ahrq.gov>).
2. Log into your account.
3. Click on **Dashboard** at the top bar.
4. Click on **Create Project** at the top right (**Figure vi**).

Figure vi



5. Enter a name for the imported project using the textbox labeled **Name**.
6. *This step is optional* - Enter a description for the imported project using the textbox labeled **Description**.
7. Click on the dropdown that says **Create an empty project** and then select the option to “Create a project from a Distiller SR .csv export” (**Figure vii**).

Figure vii



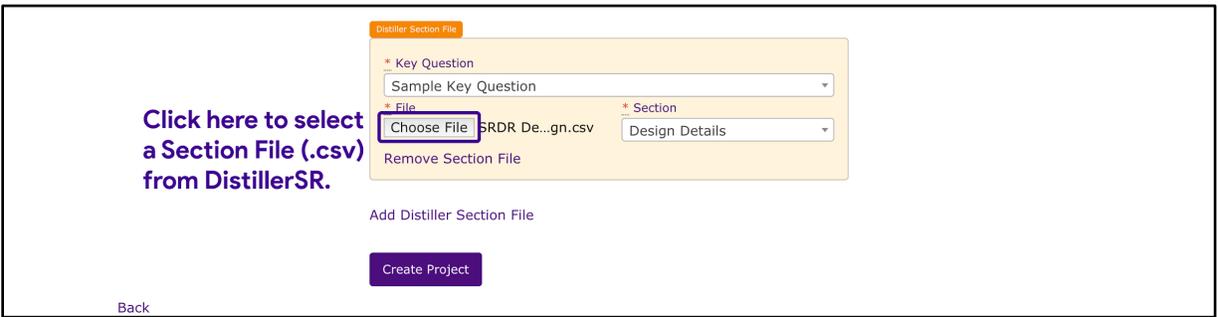
8. Under the **Distiller References File** panel (**Figure viii**):
 - a. Click on **Choose File**, then select the References File exported from DistillerSR.
 - b. Ensure that selected **File Type** is **.ris**.

Figure viii



9. Under the **Distiller Section File** panel:
 - a. Click on the **Choose File** button (or **Browse...** button on *Firefox*), and then select a Section File exported from DistillerSR (**Figure ix**).

Figure ix



- b. Click on the dropdown labeled **Key Question** and type in the key question addressed by the Section File (**Figures x and xi**). You can also select from the previously entered key questions by clicking on the dropdown option.

Figure x

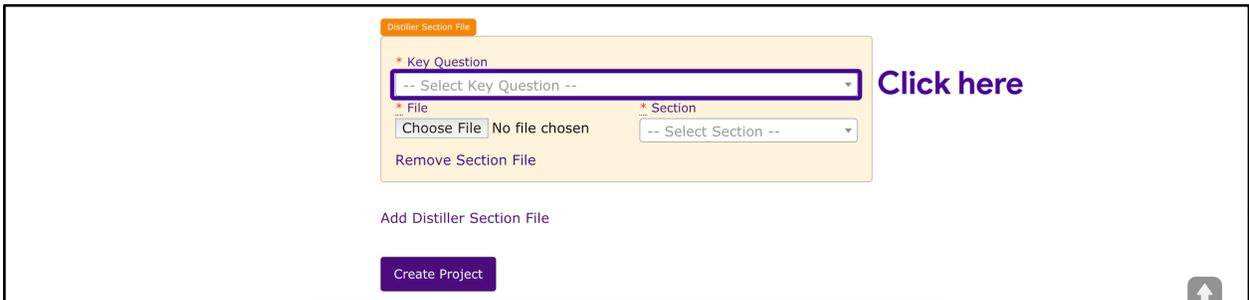
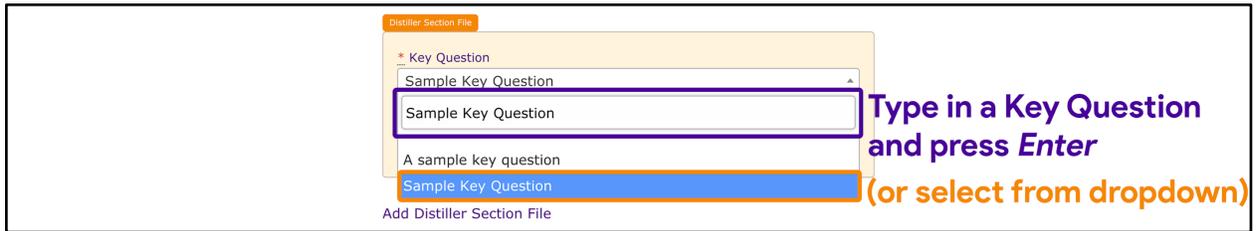


Figure xi



- c. Click on the dropdown labeled **Section** and type in a name for the extraction form section (**Figure xi** and **xii**). You can also select from the defaults by clicking on the dropdown option.

Figure xii

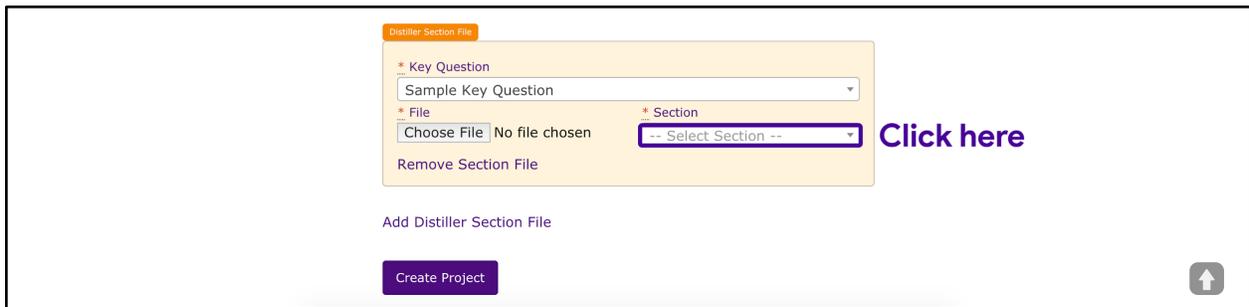
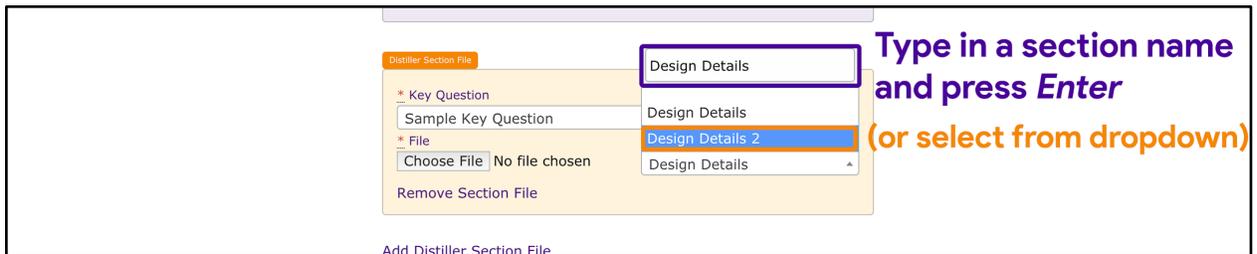


Figure xiii



10. If there are additional Section Files to import, click on the **Add Distiller Section File** link and repeat Step 7 (**Figure xiv**).

Figure xiv



11. Click on **Create Project** to start the import (**Figure xv**). A green notification will appear indicating that the import is being processed (**Figure xvi**).

Figure xv

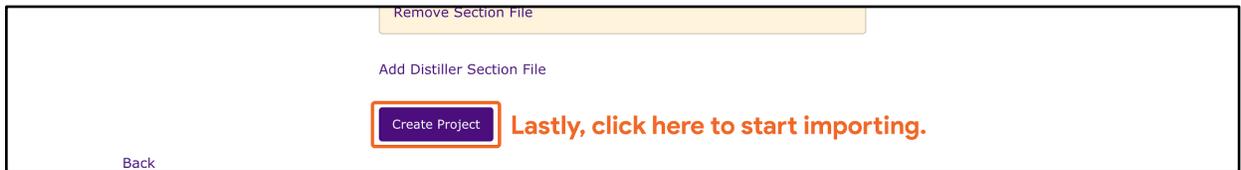


Figure xvi

