

Tutorials

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CREATING A SYSTEMATIC REVIEW

Once you have logged in to your JBI SUMARI account (see [Log-in to your JBI SUMARI account](#))

- Select [\[Create Project\]](#)

Projects

[+ Create Project](#)

Filter projects...

-
- Type the title of your proposed review in the Project title box
 - Select the appropriate review type checkbox/es

- Select [\[Create\]](#)

Create Project

Project Title

- Effectiveness Review
- Qualitative Review
- Costs/Economic Review
- Prevalence or Incidence Review
- Diagnostic Test Accuracy Review
- Etiology or Risk Review
- Text and Opinion Review
- Mixed Methods Review
- Umbrella Review
- Scoping Review
- Custom Review

[Cancel](#) [+ Create](#)

- Select [\[Protocol\]](#) from the top menu bar

Remember all text is fully editable – the text in yellow acts as a prompt and signifies that you are required to add in text to this section that is specifically relevant to your protocol topic.

DEVELOPING YOUR PROTOCOL

INVITING PARTICIPANTS TO YOUR PROJECT

- Select [\[Overview\]](#) from the top menu bar
- Select [\[Participants\]](#)
- Add the name and email address of the other members of your team and select [\[Invite\]](#). A message should appear at the top of the screen notifying you that the person was successfully invited.
- Once the invitee has accepted the invitation to join the project you are then able to assign them a role. Invitees can be privileged authors, authors or reviewers.

Please note, that every invited member to a JBI SUMARI project MUST have their own, paid access to JBI SUMARI. If you have invited participants who do not have their own JBI SUMARI account, they will not be eligible to join your project.

Please click [here](#) for a full description of permissions and access associated with each JBI SUMARI user role.

INCLUDING STUDIES

Uploading from XML

- After creating a project, navigate to **[Studies]** from the top menu bar
- Select **[Import XML]**
- Find your saved XML file and click **[Open]**
- Click **[Save]** and then **[Back]** to return to the studies home page

Please note, that only XML files generated from EndNote can be accepted into JBI SUMARI at this time

Manually inserting studies

- After creating a project, navigate to **[Studies]** from the top menu bar
- Select **[Enter Study]**
- Select the type of citation to begin
- Enter the relevant information into the text fields
- Click **[Save]** and then **[Back]** to return to the studies home page

Study inclusion

- Once all your studies have been entered into SUMARI you must now decide to include or exclude your study, based on the studies relevance to your project
- If the study is relevant to your project select **[Include]**
- If the study is not relevant to your project select **[Exclude]** after excluding a study you will be prompted to provide a reason as to why this study has been excluded

PERFORMING CRITICAL APPRAISAL

- Select **[Appraisal]** from the top menu bar
- Studies that you have included from the Studies tab will appear here. To begin the critical appraisal process, select the first, non-greyed out **[Start]** button
- For each question, you will be required to read the included study and provide an answer. After recording your answer to the question, you are able to include some additional information to support your decision by selecting **[Comment]**
- The critical appraisal page will change depending of the type of review you have selected
- Once you have provided an answer to every question, you will then be prompted for a final decision, to include or exclude this study
- Click **[Save]** and then **[Back]** to return to the appraisal home page

Please note, there is no standardised rules or criteria for how final study inclusion or exclusion will occur. This will need to be discussed by the review team prior to the critical appraisal process.

- Once you have critically appraised a study return to the appraisal tab by selecting **[Appraisal]** from the top menu bar. Here you will see that the original **[Start]** button has been changed to

now read [\[Complete\]](#)

Proceeding with 2 reviewers

- It is a requirement of the JBI that critical appraisal of studies for inclusion in a systematic review need to be done in duplicate. Two, independent reviewers are required.
- After you have completed your appraisal process you will not be able to proceed until the second reviewer has also critically appraised the same paper.
- Once the second reviewer has performed their critical appraisal of the study you will then be able to begin the final appraisal process. To do this, select the final [\[Start\]](#) button
- This will take you to the final appraisal page, here you will be able to see the appraisal results from both reviewers. If there are any discrepancies between appraisal scores these will need to be discussed between reviewers.
- Based on the critical appraisal of both reviewers you can then decide, for the final time, to include or exclude this study.
- Click [\[Save\]](#) and then [\[Back\]](#) to return to the appraisal home page

Proceeding with 1 reviewer

- Whilst it is not recommend and not JBI policy to only undergo critical appraisal with one reviewer, SUMARI does support this functionality.
- After you have completed your appraisal process, you can select the final [\[Start\]](#) button
- This will give you a prompt, confirming that you will proceed with the appraisal process with only 1 reviewer
- Scroll down to the bottom of the page and chose to include or exclude the study based on the critical appraisal
- Click [\[Save\]](#) and then [\[Back\]](#) to return to the appraisal home page

DATA EXTRACTION

- Select [\[Extraction\]](#) from the top menu bar
- Studies that have been included after the critical appraisal process will appear here. Click [\[Start\]](#) next to any listed study to begin the extraction process.
- Enter the relevant information into the text fields.
- Click [\[Save\]](#) and then [\[Back\]](#) to return to the extraction home page

PERFORMING META ANALYSIS

- Select [\[Synthesis\]](#) from the top menu bar
- Select [\[Meta-Analysis\]](#)
- You will first need to enter a comparison. Select [\[Create\]](#) to do this. Once you have entered the comparison title, you need to create an outcome. Select [\[Open\]](#) and then [\[Create\]](#). Type in the title of your outcome, select the tick to confirm and then select whether your outcome is dichotomous or continuous
- Select [\[Plot\]](#)

- Once in the plotting stage, you will need to put in the parameters for your meta-analysis. You can try some different options here. For starters (and using the drop down menus), select 'inverse variance' as the statistical method, use a 'fixed' model with the 'odds ratio' as the effect measure, with '95%' confidence interval. In the data table, select your study (using the drop down menu) and enter the events and the total sample from both the experimental and control arms. Select **[Add]** and then complete this information for other studies that contain outcome data This will produce your forest plot.
- Click **[Save]** and then **[Back]** to return to the synthesis home page

PERFORMING QUALITATIVE SYNTHESIS

- Select **[Synthesis]** from the top menu bar
 - Select **[Qualitative]**
 - Select **[Start]**
 - The first step is your findings page. Here, enter your study by selecting **[Create Study]** and enter the author/s name. Select the tick and click on **[Open]**. Start entering each finding by selecting **[Create Finding]** You will need to type in the finding and accompanying illustration. Make sure to assign a level of credibility.
 - Once complete, proceed to the categories page **[Categories]**. Select **[Create Category]** to add in the name of the category as well as a summary. All categories will appear on the right hand side of the page. To assign a finding/s (on the left hand side of the page) click on the finding to highlight it. You can select multiple findings at once. Select **[Assign Selected]** and select the category from the drop down menu. The finding will be moved to the right hand side of the page underneath the designated category.
 - Once you have completed allocating your findings, proceed to the synthesized findings page **[Synthesized Findings]** Select **[Create]** to create a new synthesized finding. You will also need to add a description. To assign a category/categories (on the left hand side of the page) click on the category to highlight it. You can select multiple categories at once. Select **[Assign Selected]** and select the Synthesized Finding from the drop down menu. The category/categories will be moved to the right hand side of the page underneath the designated synthesized finding.
 - Once completed select **[Meta-Aggregative Flowchart]**.
 - To export the meta-aggregative flowchart hover your cursor over the flowchart. A pop-up should appear providing you with different image formats in which the flowchart can be exported.
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