ReadCube Literature Review

LITERATURE REVIEW USER AI GUIDE / V 1.0 / SEPT 2024

ReadCube

ReadCube Home Page

Home Page

Navigation Menu

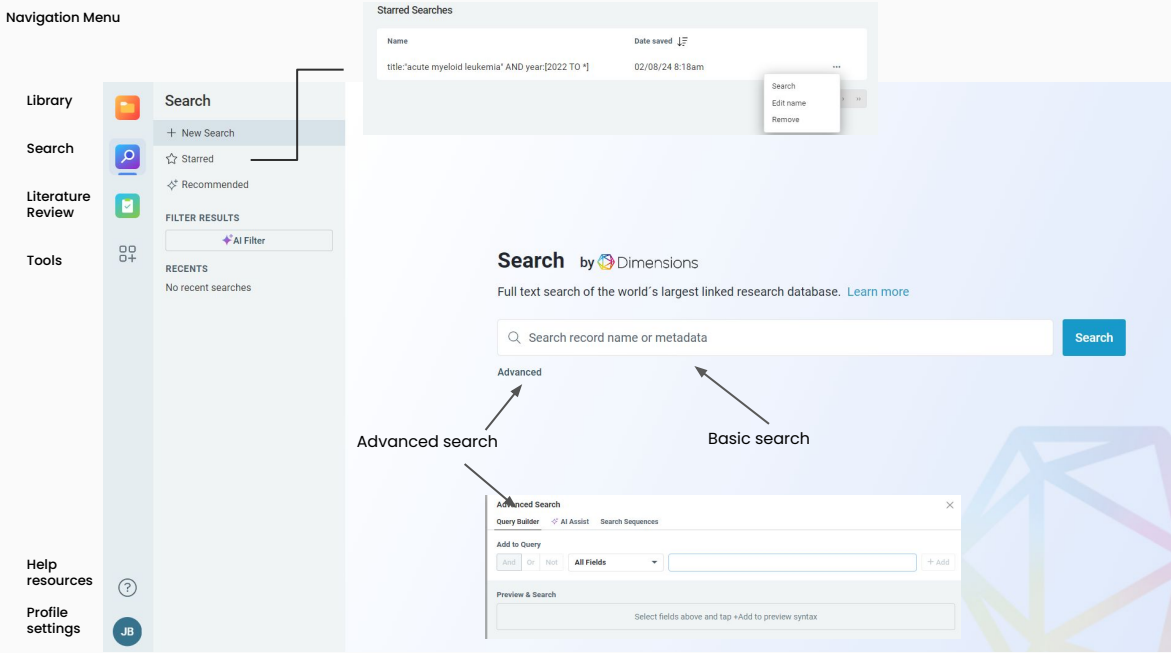
Navigate effortlessly between ReadCube Search, Libraries, Literature Review, and Tools.

Search by Dimensions

The ReadCube homepage offers robust, full-text search powered by Dimensions.

Search across the most comprehensive research database available, with access to over 120 million research publications.

Save your most effective queries to use again and find recommendations for relevant articles based on an existing collection in your libraries



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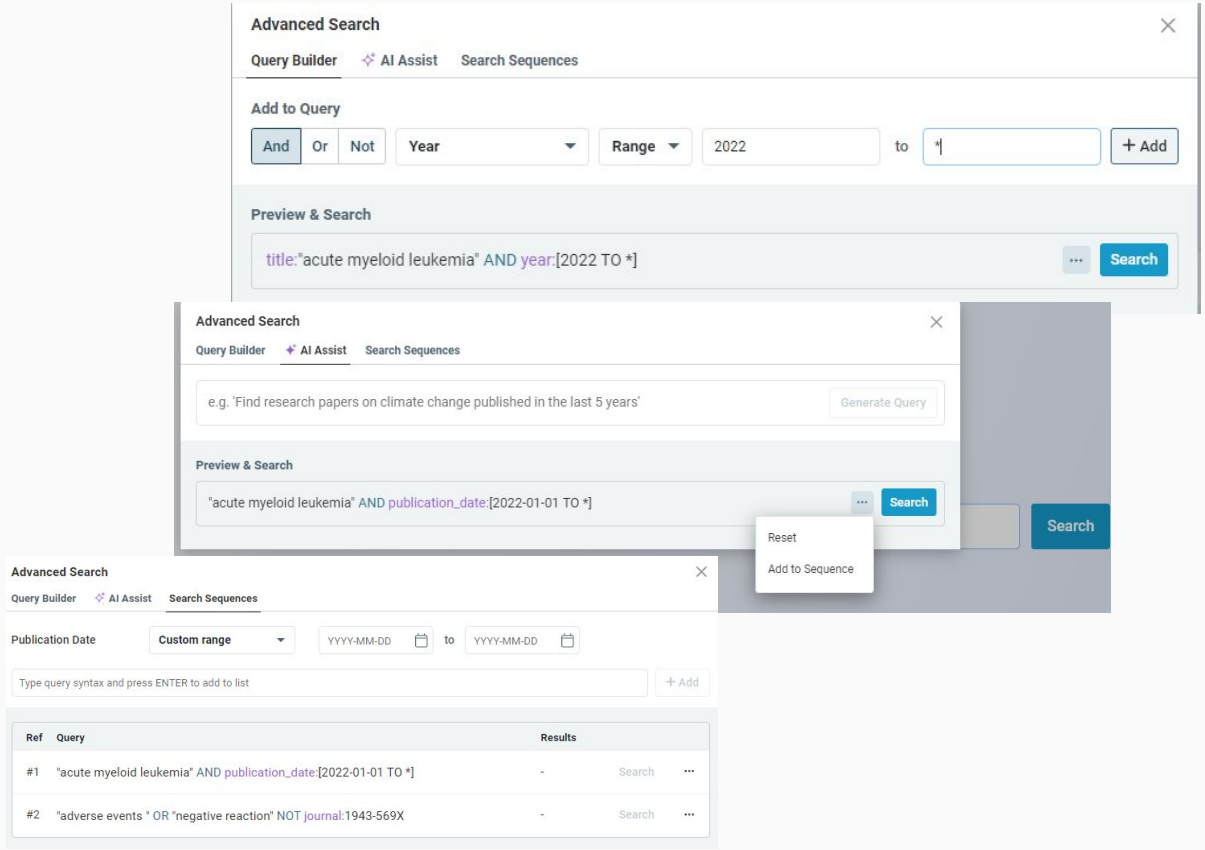
Powerful search tools with AI integration

- Avoid syntax errors using the **Query Builder** to select fields and enter terms
- Enter a plain text description of your query and **AI Assist** can generate the query for you
- Create **Search Sequences** for a straightforward approach to creating complex queries



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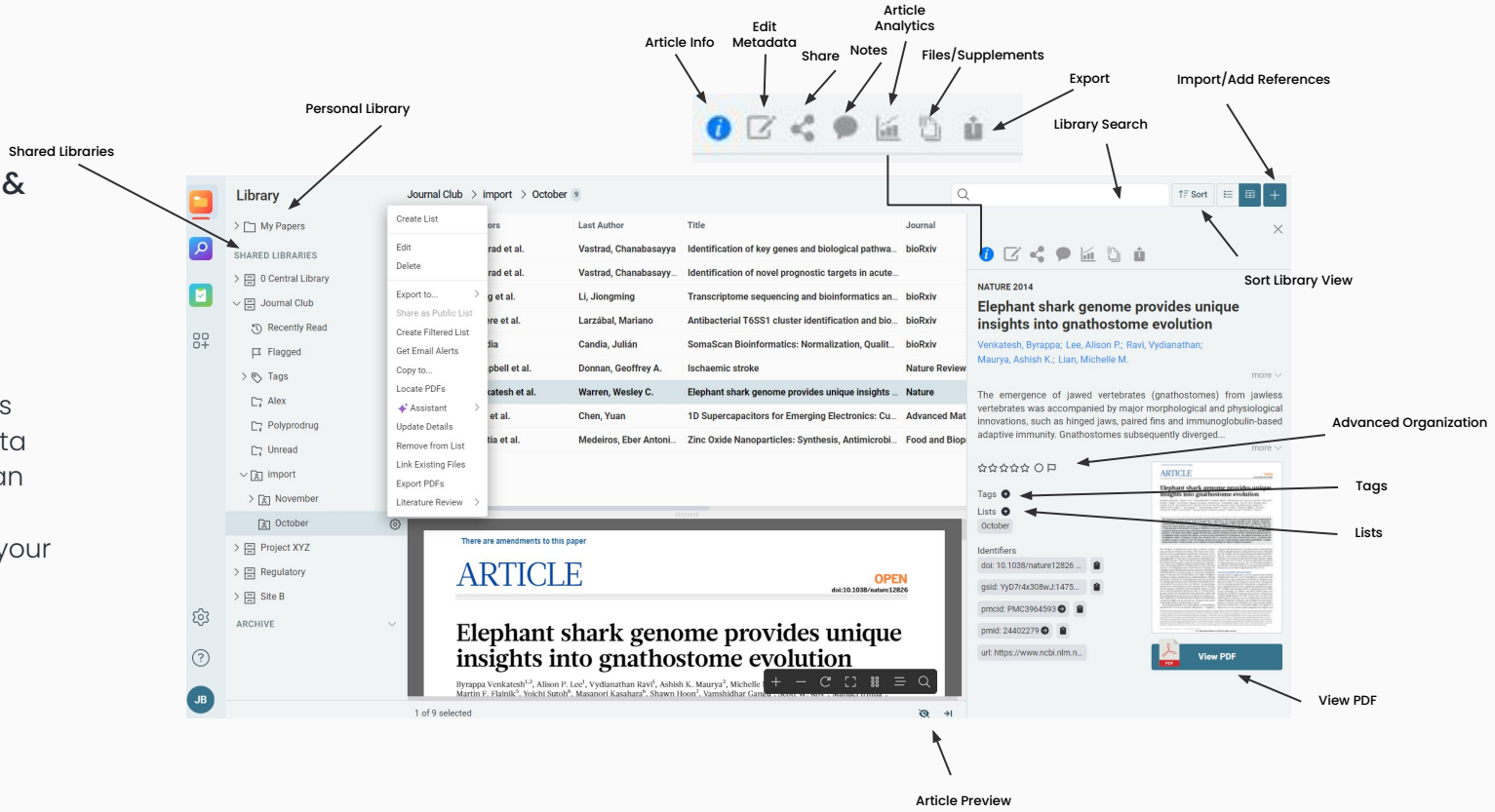
Library Feature Overview

ReadCube Libraries & Lists

Your Literature Review journey begins with ReadCube libraries. With flexible organization tools and a wide variety of data ingestion options, you can capture all of the most important literature for your research projects.



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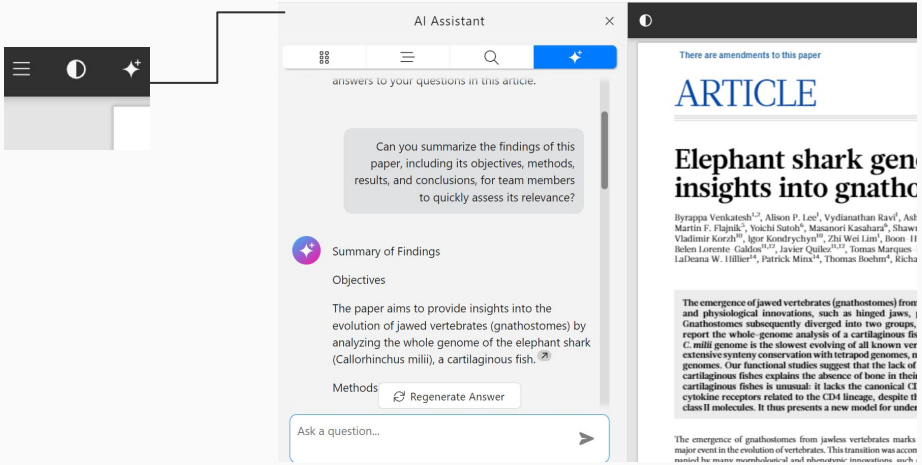
AI Assistant

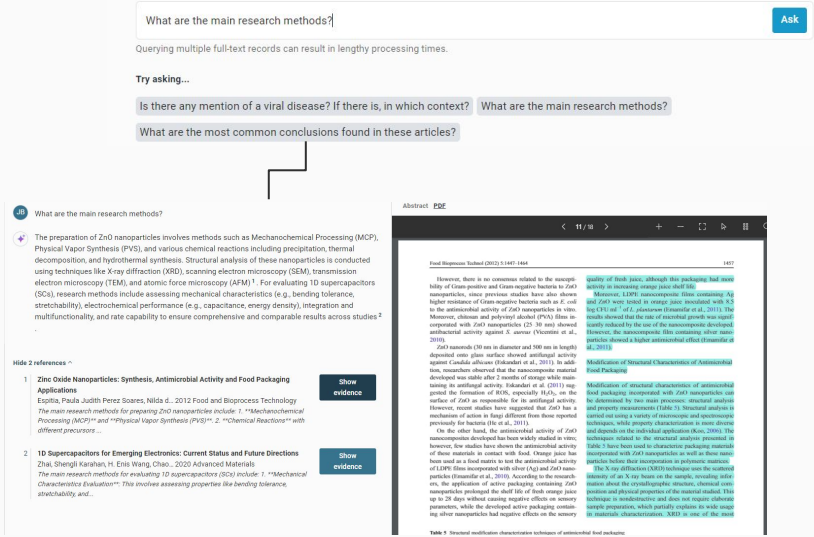
AI Assist for Individual PDFs

- In the PDF Viewer look for the AI symbol in the upper left corner of your document to open the AI Assistant
- Enter prompts to extract summaries, quantitative data, terminology and more



Analyse a collection of articles with AI Assist

- Click on the gear menu for your list of articles to **Launch AI Session** for the collection
- Select a suggested prompt or enter your own
- AI Assist will analyze based on your prompt and list all articles that answer the query, allowing you to link directly to the evidence in the paper for the response



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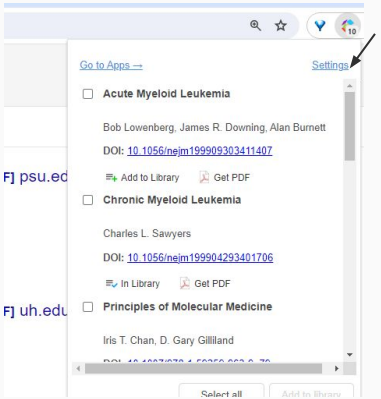
Importing & Ingesting Literature

Import directly from Discovery tools with the Browser extension

The ReadCube Browser extension works with all of the major discovery tools to seamlessly ingest results from a direct search into a specified library or list.

Browser extension



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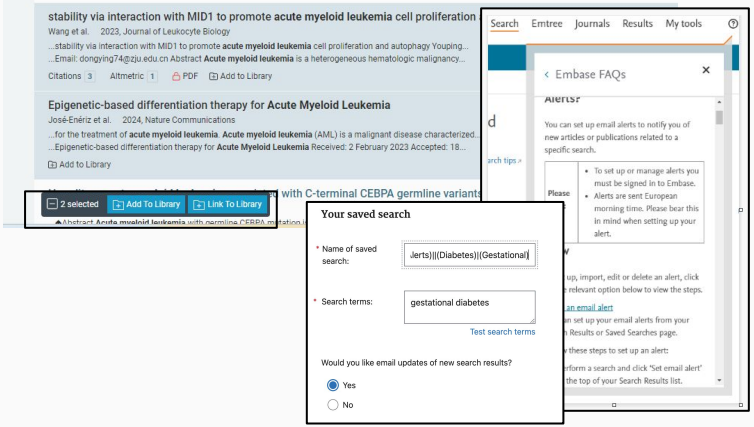
Automatically ingest new results from search queries

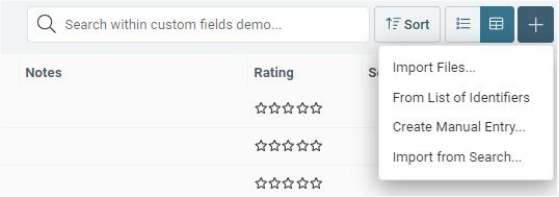
- Link a Dimensions search result to populate a ReadCube list when new results are found
- Create email literature alerts for your queries on databases such as Embase, Ovid, Dialog, or PubMed and deliver them to your ReadCube lists (Contact your CEM to set up)



Import options

Click the + symbol in the main search area to view import options

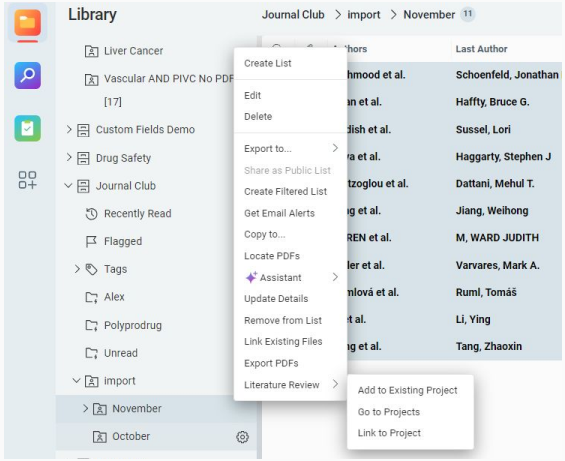
- Select **Import Files** to locate a file on your device to import
- Select **From List of Identifiers** to paste in a list of DOIs or PMIDS
- Highlight the library or list for import and select **Import from Search** to run a query and import the results into a library or list
- Drag & drop your .ris, .bib, or .csv file into your library or list to import

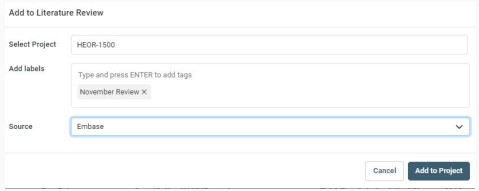


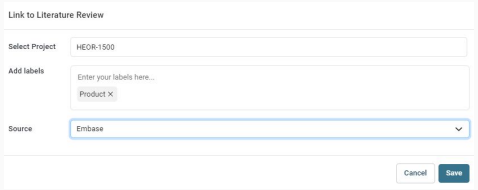
Add References to Literature Review Projects

Select specific references to add to a project

- Highlight a search result **OR** click on the Gear menu for a list that you would like to add to a project
- Locate the Literature Review menu item and select **Add to Existing Project**
- Select your project from the drop down list (you will only see projects that you have been assigned to review)
- Create or assign a label (optional)
- Select a source from the menu (optional)
- Click **Add to Project**







Link a list to a specific project

- Click on the Gear menu for a list that you would like to link to a project
- Locate the Literature Review menu item and select **Link to Project**
- Select your project from the drop down list
- Create or assign a label (optional)
- Select a source from the menu (optional)
- Click **Save.** Any new references that added to the list going forward will automatically be added to your Literature Review project

Literature Review

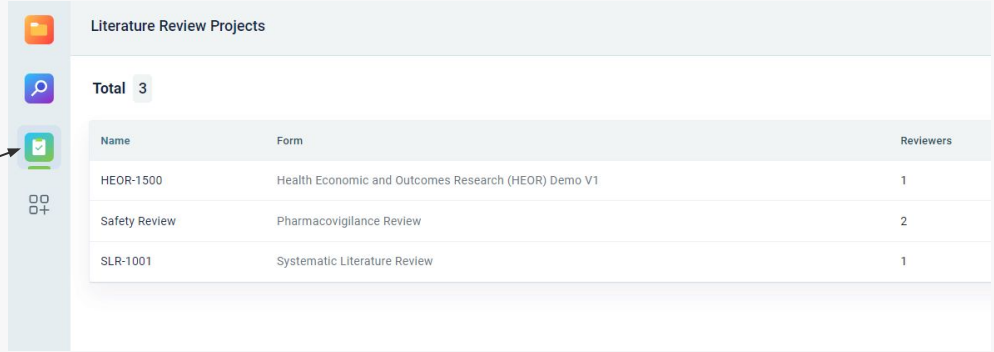
Literature Review Navigation

Open Literature Review

Click on the green Review link in the main platform navigation menu to open Literature Review. By default, Literature Review opens in the **Projects** section.

Navigation path

As you click into levels of the platform, your Navigation path will appear in the upper left corner. Click on any section in the path to return to that section



Project Table

Table view

Only projects which are assigned to you will appear in your Project table.

Click on Name. Created, or References updates columns to sort projects by those columns

Search/Filter and Export

Search projects by title, or filter by Created and/or update date.

Click on the Export option to download the projects that appear in your table view.

Project Status Navigation

Toggle between projects by status:

- Active
- Drafts
- Archived

Reference table

Reference Table View

Click on any project name to open the Reference table for any project:

- References in table will show Pending, Excluded, or Included
- For references that have been reviewed, you will see the Reviewer listed in the table
- Click on the column headings for Title, Stage, Added, or Updated to sort by those columns
- Click on the pencil icon in the Labels column to add a label to the record from the table
- Click on the 3 dot action menu in the far right to Reset a review, Delete a record, Mark a record as duplicate, or view an audit log for the record

Search/Filter and Export

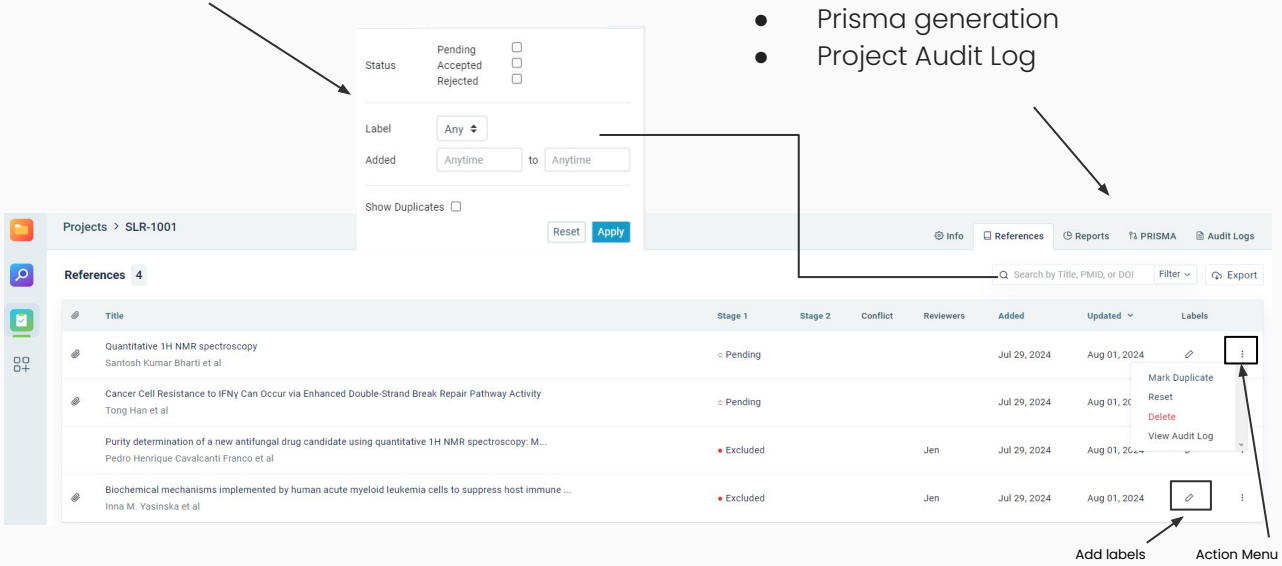
Search references by title, DOI, or PMID.

Filter references by status, label, or added date. You can also choose to show any duplicates

Project Navigation

A project navigation menu is located in the right corner of the Reference table. Access:

- Info - project settings
- Reports - (Inclusion/Exclusion or Custom)
- Prisma generation
- Project Audit Log



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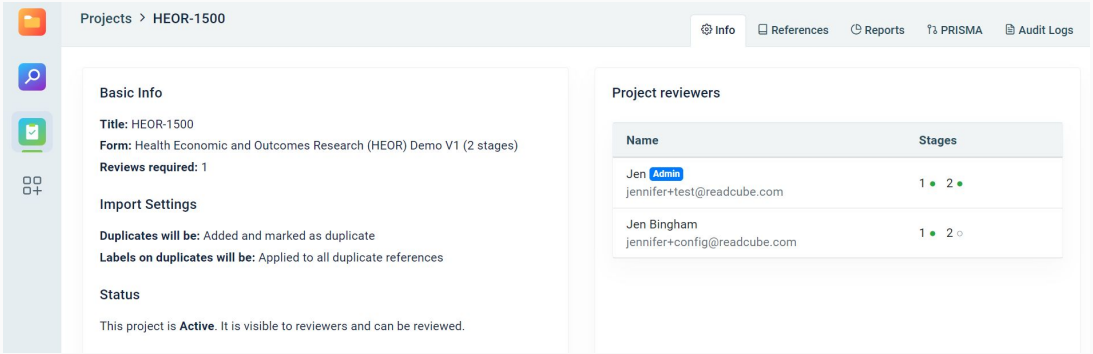
Project Information

Review project settings

Click on the **Info** tab in the upper right Navigation Menu to review project information & settings. On this tab you will find:

- Project name
- The form template utilized
- Number of required reviewers at each stage
- Duplicate handling
    - Duplicates are skipped
    - Duplicates are added but marked as duplicate (will only be visible when show duplicate filter is applied)
- Label handling for duplicates
    - Labels are applied only to the added reference
    - Labels are applied to the duplicate record
- Names of assigned Reviewers with stages that are assigned

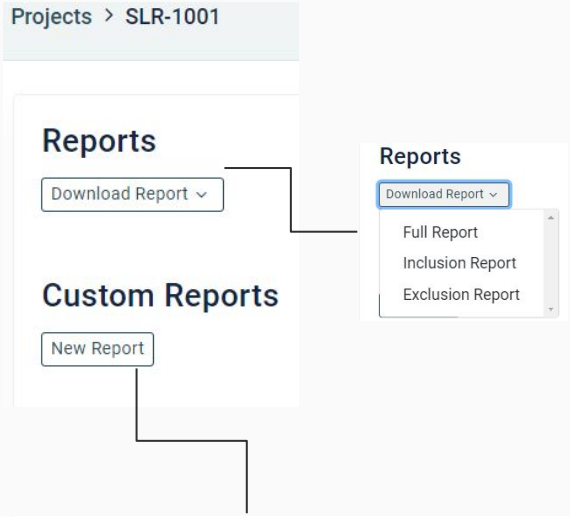


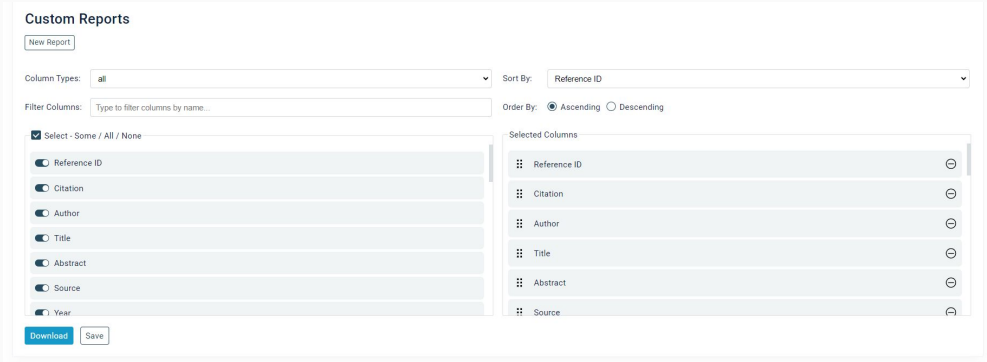
Reports

Generate Reports on your Project

Click on the **Report** tab in the upper right Navigation Menu to generate a report. Available reports include:

- Full report - exports all fields for all references regardless of Inclusion/Exclusion status
- Inclusion Report - exports all references indicated as Included and associated responses
- Exclusion Report - exports all references indicated as Excluded and associated responses
- Custom Reports - exports selected fields for all references regardless of Inclusion/Exclusion status
    - Custom reports can be saved as a template and used again
    - You can either turn off fields that you do not want to include, or you can turn off the Select All option to turn on the specific fields you want to include
    - Selected fields will appear in right panel
    - Set the Sort order & Ascending/Descending order for your export
    - Exports are in Excel format



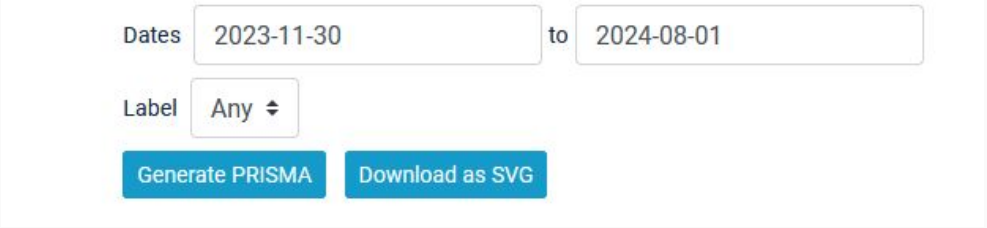


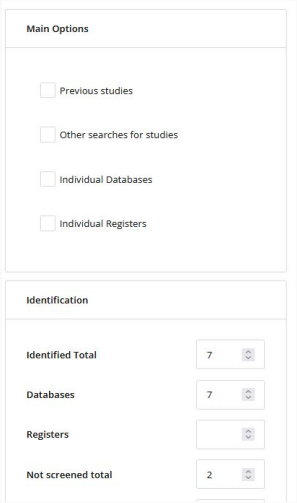
Prisma

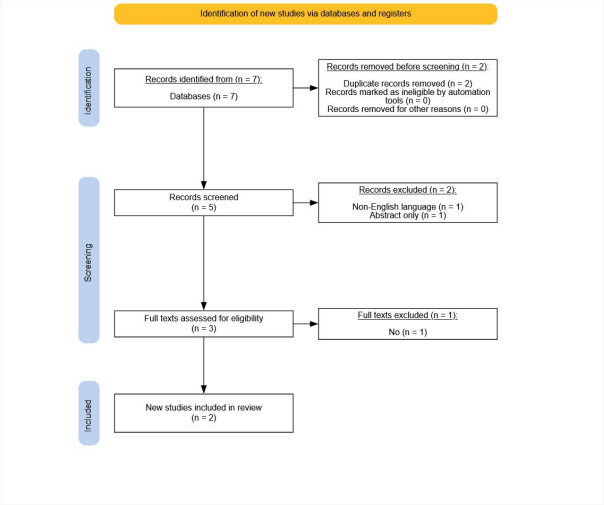
Generate a PRISMA Report on your Project

Click on the **PRISMA** tab in the upper right Navigation Menu to generate a report.

- The project PRISMA can be filtered by specific added dates and/or by a specific label
- Manually adjust any field as needed from the side panel
- Download your PRISMA in SVG format to add to your document or report

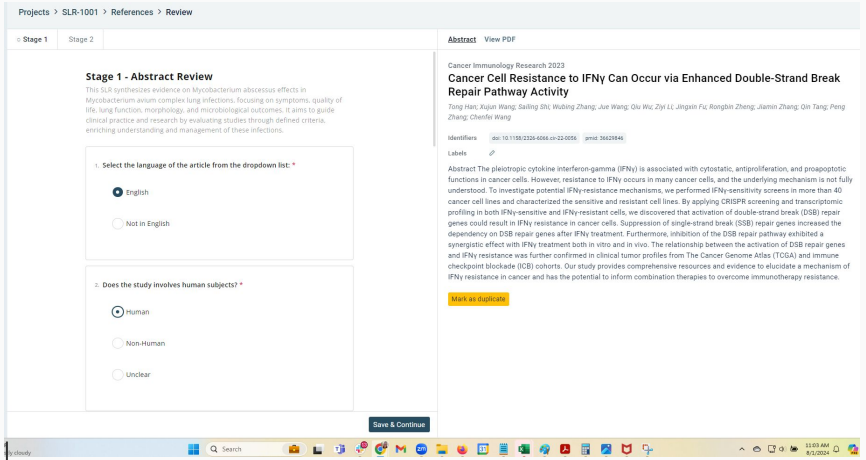


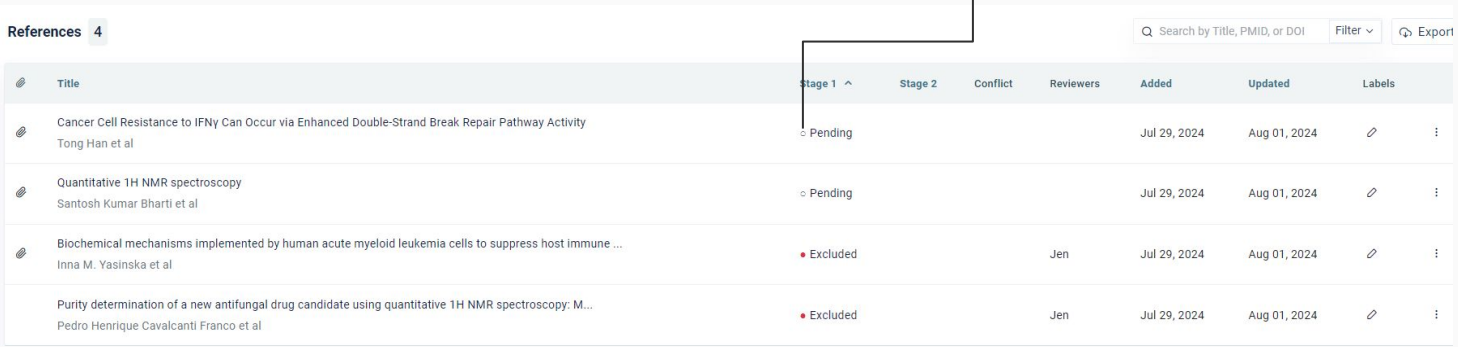




Article Review

- Open your project to the reference table to locate records that are pending review
    - Click on a specific stage column to sort by the status of that stage, or filter your table view based on the status
- Click on the **Pending** link for the first reference in the table to open it and begin review
- The form will have your questions on the left hand side pane, and the Abstract or PDF in the right-hand pane





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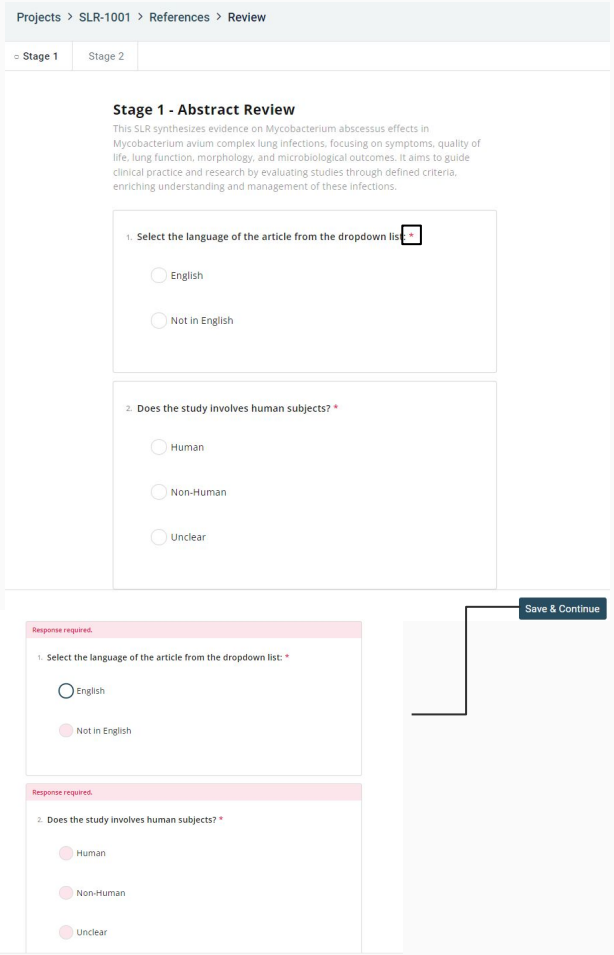
Question Panel

The form will open to the first question under the Stage you opened. You must complete the earlier stage for a reference before proceeding to the next stage. In the form:

- Some questions will only be visible if a specific reply is provide in an earlier question
- Some questions are required. These will be indicated by the red asterisk
    - If you try to save the form without responding to a required question, you will receive an error message jumping you to the first required question
- Make sure to save the form after completing for each reference, this will allow you to continue to the next pending reference
- After your complete all pending questions in your Stage, you will return to the reference table. If you are assigned to later stages, you can now proceed with editing those stages.



Abstract/PDF Panel

- By default the reference will open to Abstract view of the article. In this view you should see the metadata items if they were present on the record in your ReadCube library:
    - Article & Publication titles
    - Year of publication
    - Public identifiers such as DOI or PMID
    - Any labels that exist for the reference (labels can be added to the record directly from this view using the pencil icon)
    - The full Abstract
- If the record is determined to be duplicate, you can **Mark as duplicate** from the Abstract view and continue to the next reference.
- If the PDF is attached to the record, you will see the option to **View PDF.** Click to open if the full text review is required
- If the PDF is not attached and full text is required, click **Attach PDF** to Import the PDF from your ReadCube library or Device

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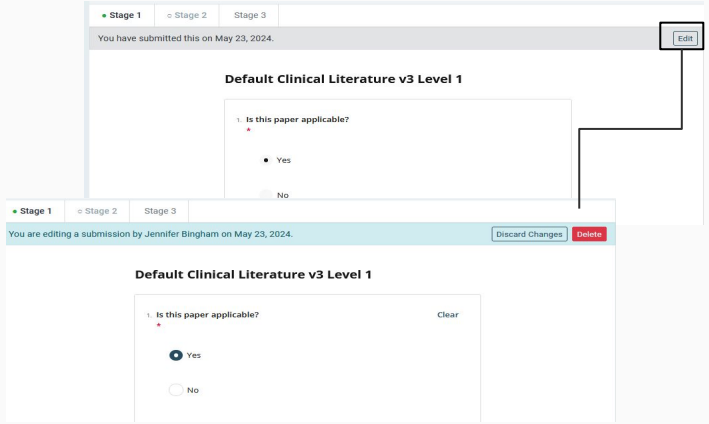
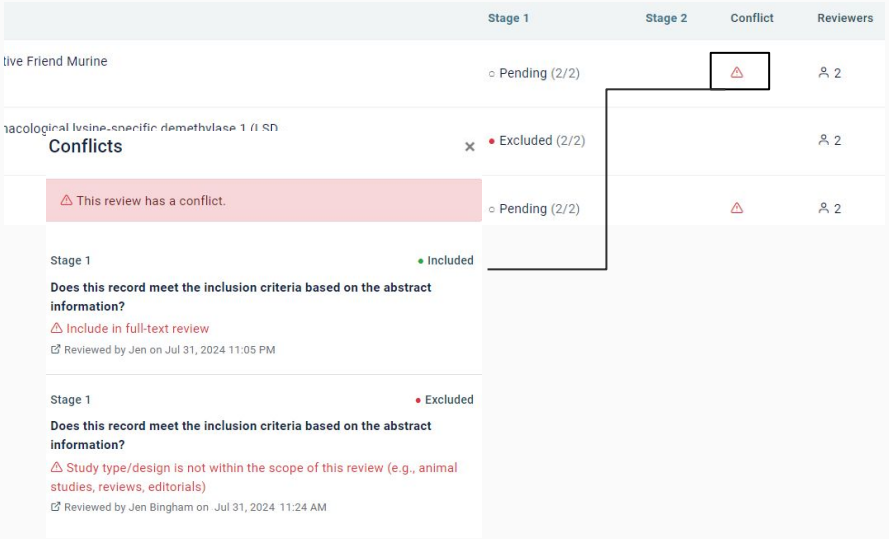
Editing Responses

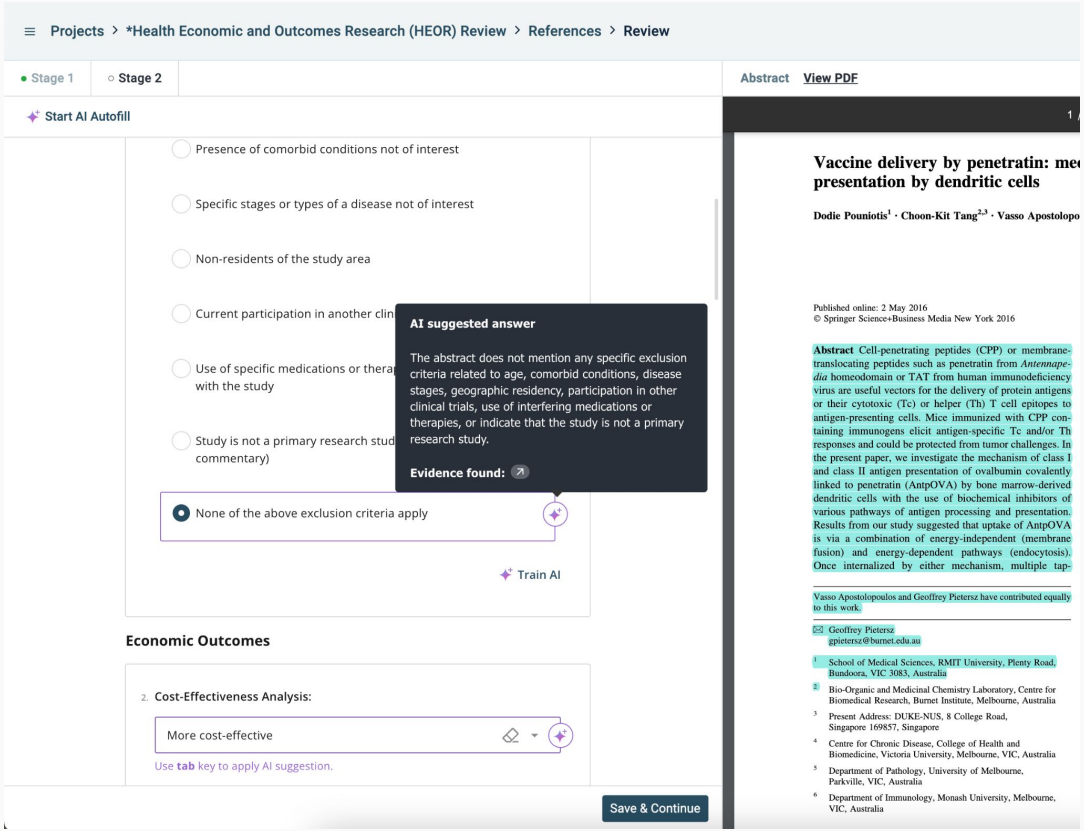
- You will only be able to edit references for the stages you are assigned
- If you need to edit a response that was already submitted, open the record for the stage. You will see the Reviewer (yourself or other) who submitted the original response, and the option to edit will appear. Click **Edit** to update and responses and remember to save your changes.
    - The ability to edit another reviewer's response is only available for projects that have a single reviewer requirement
    - Editing responses at an early stage will reset the responses for later stages
- For projects that require more than one reviewer for each stage, when there is a conflict between the users responses, you will see a Conflict flag. The two users should confer and agree on the correct response and the reviewer with the response that needs to be changed will need to edit their response





AI Review

- **AI Assistant in Literature Review**: analyze document titles, abstracts, and full text (when available) to extract relevant information and efficiently answer specific questions posed in a review.
- **Start AI Autofill**: automatically populate answers for each question in the review form, following the logical sequence. This ensures that the responses are organized and consistent with the structure of the review.
- **AI Suggested Answer**: add valuable insight by explaining why the AI selected a particular answer, helping users understand the reasoning behind the responses and assess their relevance and accuracy.
- **Evidence Found**: Highlight specific sections of the document where the AI found information pertinent to the answers, enhancing transparency by allowing users to see the source of the information within the document.



AI Review

Train AI: Users can refine the AI's prompts to improve the quality and accuracy of the answers for future references. This feature is essential for tailoring the AI to better meet specific needs or correct any recurring inaccuracies.

- **Run New Prompt**: Once adjustments are made, the AI can immediately run the revised prompt. This allows users to add specific language or parameters that refine the scope of the AI's search and analysis, ensuring the returned answers are more precise and relevant to the user's specific questions.

- **Save Your Prompt**: After training the AI with new prompts, users have the option to save these modified prompts. This feature ensures that any future literature reviews utilize the improved prompts.
    - Suggestion: After training the AI with new prompts, users can save the modified prompts, ensuring that future literature reviews utilize the improved prompt.