Managing References for Systematic Review

Step 1: Export/import references into RefWorks Account
- Create a folder for each database search results, i.e. MEDLINE, EMBASE, PsycINFO, Scopus...
- Export references into Refworks and sort into appropriate folders. Refworks has problems importing over 1000 records at a time. May need to divide search results.
- Record total # of records in RefWorks database (Box 1)
- Backup RefWorks database (Tools – Backup & Restore)

Step 2: Remove Duplicates
- Delete duplicate versions of the same article
  - View – Exact duplicates
  - View – Close duplicates
- Record total # of records in RefWorks database (Box 2)

Step 3: Initial Screening
- Create folders for Initial screening process
- Review abstracts and sort records into folders
  - Initial screen – Exclude (Box 3)
  - Initial screen – Include (Box 4)*
- Backup RefWorks database (Tools – Backup & Restore)

*The Include folder will contain abstracts which meet your inclusion/exclusion criteria OR articles which may meet your criteria but you need to read the full paper for more details.

Step 4: Second Screening
- Obtain full text articles for all records in the “Include” folder (you can attach pdf article to the RefWorks record)
- Create folders for 2nd screening
- Read full text articles and sort records into folders
  - Second screen – Include
  - Second screen – Exclude (Box 5)

Adapted from Figure 11.2.1 Study Flow diagram, (2011, March). In Cochrane Handbook for Systematic Reviews of Interventions. www.cochrane-handbook.org

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