RefWorks and the Systematic Review Process

The purpose of this supplemental handout is to highlight specific aspects of database export, and RefWorks applications which are relevant to the PRISMA citation assignment process. The Scott Memorial Library’s guide is a more comprehensive resource for learning RefWorks.

Collaboration in One RefWorks Database
Create a new RefWorks account for authors to share login credentials and view references within a centralized database.

**Tip:** restoring a RefWorks account from a backup will overwrite existing content.

Database Export
A systematic review generally involves a search of different databases, each presenting with a varied method for exporting search results to RefWorks. Once the team decides on which databases to utilize, obtaining an understanding of these methods will streamline the process. A list of instructional handouts can be found at [http://jefferson.libguides.com/citationmanager_RefWorks](http://jefferson.libguides.com/citationmanager_RefWorks). The following examples demonstrate this variability.

- PMC (PubMed Central) exports single citations only: [http://jdc.jefferson.edu/cgi/viewcontent.cgi?article=1077&context=help](http://jdc.jefferson.edu/cgi/viewcontent.cgi?article=1077&context=help)
- PubMed only imports via an indirect method. A text file is saved and uploaded to RefWorks: [http://jdc.jefferson.edu/cgi/viewcontent.cgi?article=1005&context=help](http://jdc.jefferson.edu/cgi/viewcontent.cgi?article=1005&context=help)
- Scopus and Ovid provide the option to choose exported fields. [http://jdc.jefferson.edu/cgi/viewcontent.cgi?article=1033&context=help](http://jdc.jefferson.edu/cgi/viewcontent.cgi?article=1033&context=help) [http://jdc.jefferson.edu/cgi/viewcontent.cgi?article=1008&context=help](http://jdc.jefferson.edu/cgi/viewcontent.cgi?article=1008&context=help)

**Caution:** supplemental information, such as article references or subject headings, may pose for a slow scrolling process when viewing citations in RefWorks.

Web Export
- Google Scholar: individual reference export only. [http://jdc.jefferson.edu/cgi/viewcontent.cgi?article=1040&context=help](http://jdc.jefferson.edu/cgi/viewcontent.cgi?article=1040&context=help)

Import Tips
- Collaborate ahead of time on which reference fields are pertinent to the systematic review project, taking into account the necessary information to fulfill the criteria for the anticipated citation style.
- Try to limit individual database exports to RefWorks approximating 250 citations. Export in more than one batch, if needed.

**Caution:** timeouts or incomplete imports may occur with large exports.
Managing Citations in RefWorks Based Upon the PRISMA Flow Diagram

Folders
- Create folders based upon the PRISMA Flow Diagram.
- Ensure assignment of references to the designated database folders (e.g., 1 PubMed) is complete before merging. Example: http://jefferson.libguides.com/content.php?pid=544325&sid=4607932

Merging Citations
- Select All in List under References to Use, hover over the Add To menu and select the 1 merged folder. Repeat for each database folder.
- In this example, the 1 PubMed citations are added before the 1 Scopus and 1 other folders. The eventual 1 merged folder will contain 158 citations, which will then be ready for de-duplication.

De-duplication
- Important for achieving a unique reference list, as searching more than one database with a similar search strategy may retrieve overlapping results.
- Find Duplicates is located within a pop-up menu by either a right click of a folder link in the Folders menu (A) or selecting the folder icon in Organize & Share Folders (B).
- There are two methods to Find Duplicates:
  1. Exact Duplicates in this Folder: 1st step, perform until no references exist.
  2. Close Duplicates in this Folder: 2nd step, same as above. Complete even in cases where there are no Exact Duplicates identified.
B.

Process
Removing citations from the merged folder during de-duplication: applies to Exact and Close Duplicate methods.

- RefWorks automatically positions the last imported citation at the top of each duplicate set and ticks the box to the left of its Ref ID. Ensure that each of these selected citations are indeed duplicates. Then select the **Selected** radio button and then the **Remove from Folder** icon. **Note**: this is the only instance which requires **Remove from Folder** during the PRISMA citation review process.

- The red X is to be avoided, as it will remove references from all folders.
If the X is selected in error, this action can be reversed by clicking **Deleted References** first from the View menu.

![Deleted References screenshot]

Then select **Restore your deleted references to your database**.

![Deleted References screenshot with restored references]

**Screening and Eligibility of Articles**

Final citations to be assessed in the systematic review:

- Since citations are to be excluded or included, the **Selected** option under **References to Use** is utilized instead of **All in List**.
- Obtained by starting with the de-duplicated “1 merged” and utilizing **ADD To** for populating folders: “2 Screened exclude” (shown in example below), “2 Screened include,” “3 Eligible exclude,” and “3 Eligible include.”

![Reference selection screenshot]

**http://jefferson.libguides.com/systematicreviews**
Editing

Once the final project references have been identified, editing may be required. Imported reference fields may be populated inconsistently, depending on the database. Corrections are best accomplished before the final bibliography is created by RefWorks.

Process
Select the Edit icon for each reference to make changes.

The resultant Edit Reference window displays the Fields used by citation style and Reference Type. After making changes, select Save Reference to complete.
RefWorks Folders: Alternative Labeling

<table>
<thead>
<tr>
<th>RefWorks folder name</th>
<th>PRISMA How Diagram Label</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 CINAHL 1 PubMed 1 Cochrane</td>
<td># of records identified through database searching</td>
</tr>
<tr>
<td>1 Other</td>
<td># additional records identified through other sources</td>
</tr>
<tr>
<td>1 Merged</td>
<td># of records after duplicates removed = # of records screened</td>
</tr>
<tr>
<td>2 Screened include</td>
<td># of full-text articles assessed for eligibility</td>
</tr>
<tr>
<td>2 Screened exclude</td>
<td># of records excluded</td>
</tr>
<tr>
<td>3 Eligible include</td>
<td># of studies included in syntheses</td>
</tr>
<tr>
<td>3 Eligible exclude</td>
<td># of full-text articles excluded, with reasons</td>
</tr>
</tbody>
</table>

Example

RefWorks Folders

Four Folders:
1 CINAHL=1200
1 PubMed=2000
1 Cochrane library=700
1 Google=1100
N=5000

1 Merged Folder:
References screened by title and abstract
N=4200

2 Screened Include:
Full-text articles assessed for eligibility
N=200

Duplicates removed
N=600

2 Screened Exclude:
N=4000

3 Eligible Exclude:
not Trials=100
No control=95

3 Eligible Include:
N=5