

USING ENDNOTE FOR SYSTEMATIC REVIEWS

IMPORTING AND DEDUPLICATING RESULTS

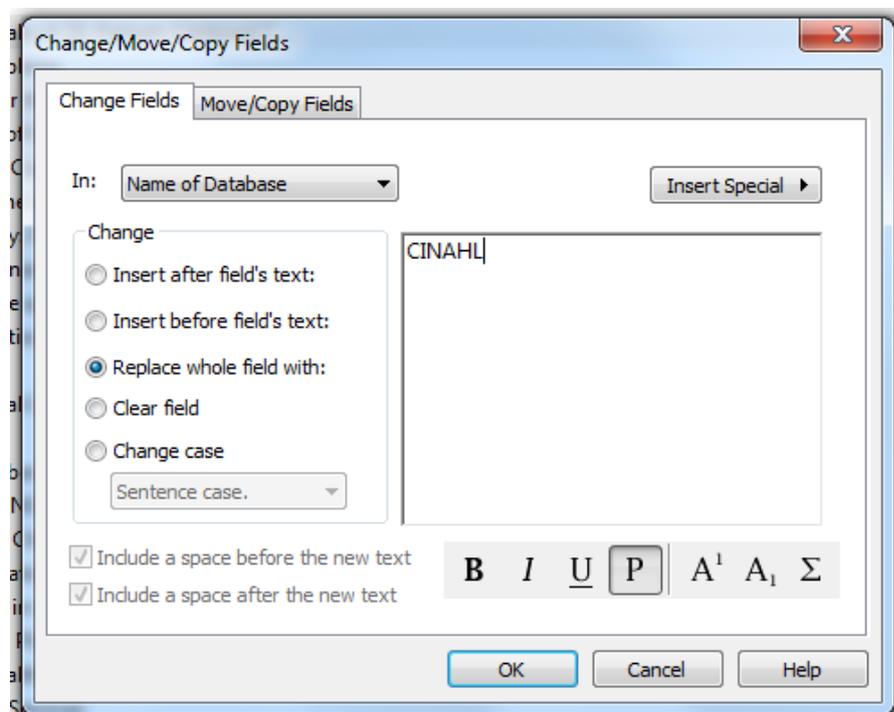
It is almost certain that you will have the same articles appear in the searches you run in different databases. Sometimes these results will appear absolutely identical, sometimes there will be subtle differences - J. Smith in one, J.A. Smith in another, Jane Smith in a third - but they are indeed the same article. You will need to remove these duplicates from the results pool in order to give an accurate figure of how many individual-but-different results you have retrieved.

Deduplicate results **before you decide on relevance, so you only need to decide on relevance once for each article.**

Create a folder on your computer to keep a number of EndNote Libraries all together.

Create a new Library for your first database, saved in that new folder, and have only that Library open; send the results into it from the database.

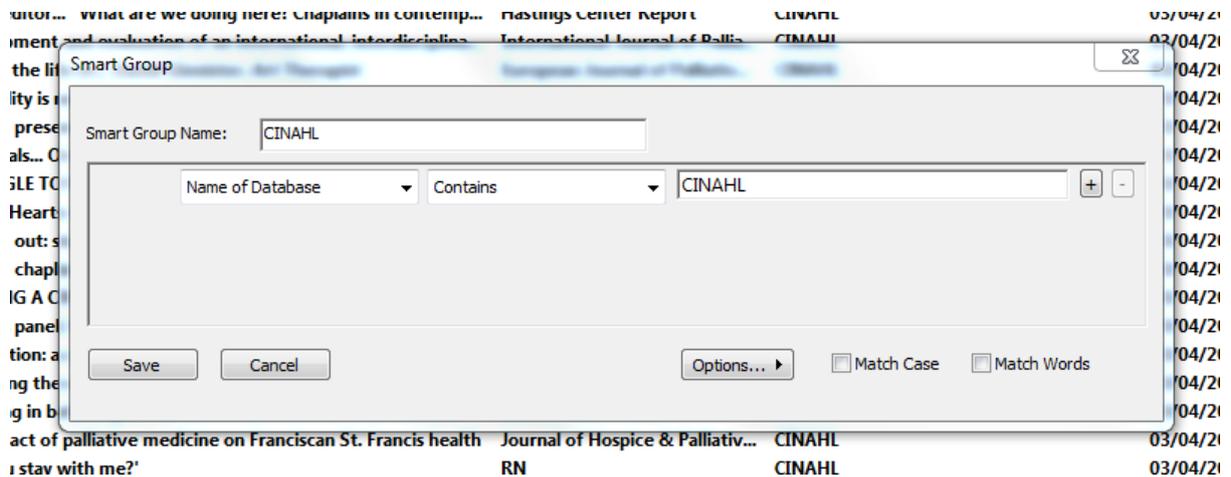
In that EndNote Library, look at the records and make sure they all have the database name under *Name of Database* – if not, select them all, go to *Tools > Change/Move/Copy Fields*, and under the *Name of Database* field, choose *Replace whole field with:* and add the name of the database there.



Close the Library, create a new Library for the next database and send in the next batch of results.

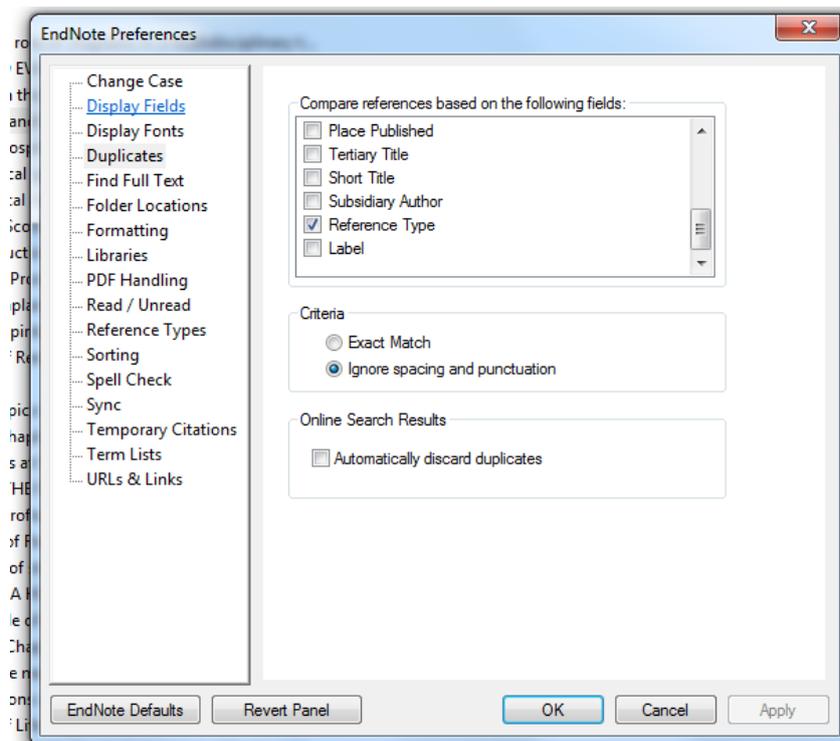
Once you have separate Libraries created for each database, create a new blank “master Library”.

You can create Smart Groups in this Library to automatically display how many results you have left from each database. For example, *Name of Database > contains* [whatever you called it using *Change/Move/Copy Fields*]

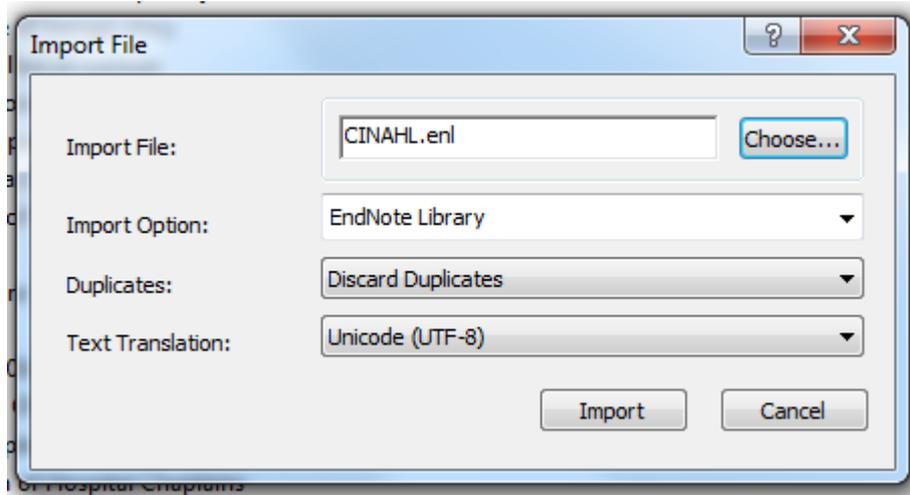


Decide which order you are going to import the databases’ Libraries. This can be important as it will decide which of the duplicate results you will keep.

What counts as a duplicate is decided under *Edit > Preferences > Duplicates*. By default matches must have the same authors, year, title and reference type, but variants in spacing and punctuation are ignored. You can make changes here to widen or narrow the definition. You might decide you don’t care if a journal article is print or electronic, so you would untick *Reference Type*.



Go to *File > Import > File*. Choose the Library (a .enl file), then under Import Options select *EndNote Library*. Tell it to *Discard Duplicates*.



Many of the duplicates will then be automatically deleted as the results are imported into your master Library.

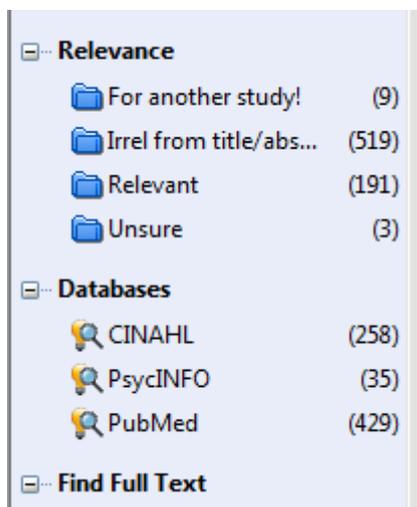
You can find duplicates later by going to *References > Find Duplicates*.

Trust me, there will still be duplicates in there. Order the whole list by author, or by title, to help see them. All things being equal, keep the one with the lower record number – this is the one you imported first, decided by which database you imported before the other. You can make this easier by setting one of the displayed columns to be *Record Number*.

DECIDING ON AND RECORDING RELEVANCE

We need to come up with folders (*Groups* in EndNote) to keep our relevant and irrelevant results separate from each other. It's easiest to have these folders together in a *Group Set* - you can create other sets later to group together other things, like themes or authors, but don't do that yet. Go to *Groups > Create Group Set*. Call it *Relevance*.

Add sub-groups to it, for example, *Irrelevant from Title/Abstract* and *Relevant*.



Knowing whether you have made a decision on relevancy will be done by moving each record into one of these groups. Any record that isn't moved into a group is listed as *Unfiled*.

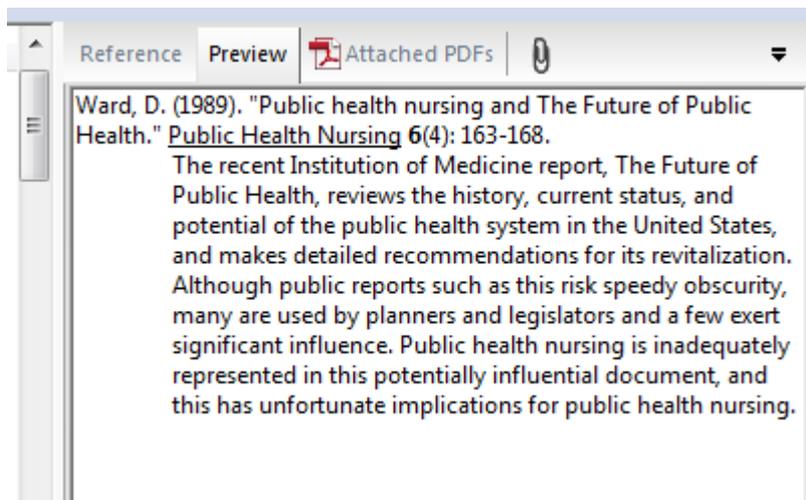
Don't put records into other folders until you have decided on relevance (Smart Folders are OK as they work differently) as it will then no longer be *Unfiled* and it makes it much harder to know whether it's gone into one of the *Relevance* groups yet. Remember, an article can be relevant but bad; decide on relevancy before you critically evaluate the study.

Click in to *Unfiled*. This is important!

Set the citation style to *Annotated*, and the Reference Panel to *Preview*.



This shows you any abstracts that came in with the record, and makes it easier to see if the article is relevant.



Work your way through the *Unfiled* records, moving them to *Irrelevant* and *Relevant* (etc.) as appropriate, until there are no records left without a group - *Unfiled* will be empty. That way you've made a decision about each record.

Then you can decide if you need to see the full text, and whether the article is well-written, and start populating other groups. You can add any thoughts you have to the record under the *Research Notes* field, or use the *Rating* field.