Organising Systematic Review Citations Using RefWorks

Overview

Step 1 – Create a suite of folders for each project
Create a set of folders and sub-folders according to Figure 1. Maintain separate parent folders for every project (e.g. “Project 1”). Name files as appropriate for your systematic review. For example, label exclusion folders according to the criteria you have laid out. Numbering the folders helps to organise them in RefWorks, which will automatically order them.

Figure 1: Folder structure
Figure 2: Importing to the PubMed folder

Step 2 – Import your references

Working one database at a time, import references into the appropriate folder in RefWorks. For example, to import PubMed citations, click the “Import” button, and select the “PubMed” folder. The citations will then be imported directly into the “PubMed” folder. Immediately after doing this, move all imported citations into the “Project 1” AND “All Results” folders. Repeat this process for each database.

Step 3 – Move all citations to the “Included” folder

Move all citations (from all databases) from the “All Results” folder into the “Included” folder. From this point forward, you will be working exclusively within the “Included” folder.

Step 4 – Identify duplicates

Duplicates can be detected automatically using the Find Duplicates tool, or can be found manually.

Using the Find Duplicates tool

RefWorks provides a tool for removing duplicates, which can be accessed by opening the “Organize & Share Folders” tab and rolling over the folder icon for the folder you wish to search – in this case, the “Included” folder. Search for Exact Duplicates first, followed by Close Duplicates.

Tip

When checking for duplicates, be sure to choose the folder in which you want to search – in this case, the “Included” folder.

Searching manually

Alternatively, depending on the number of citations to be checked, you might want to remove duplicates manually. This can be done by sorting citations by author, title, or other relevant field, and then physically scanning the list for duplicates.
Removing duplicates

Do not delete duplicates entirely! This will make it difficult to maintain accurate counts when reporting your systematic review. Keep track of your duplicates using the following method:

1 – Working in the “Included” folder, select duplicates (using the checkbox) and move them to the “Duplicates” folder. If using the Find Duplicates tool, duplicates will be selected automatically. After being moved, the citation will remain selected in the “Included” folder, so you won’t lose track of it.

2 – Once a duplicate has been added to the “Duplicates” folder, immediately remove it from the “Included” folder. The citation is now housed in the “Duplicates,” “All Results,” and “Project 1” folders, but NOT in the “Included” folder.

Tip
Be sure to use the “Remove from Folder” button (outlined, right), and NOT the “Delete” button.

Step 5 – Apply inclusion/exclusion criteria
Your inclusion/exclusion process will occur in several phases, since you will be screening studies based on title (or title/abstract) and then by full text. The documentation requirements of your project will dictate how many sub-folders you will need at each step in this process. In the above example, only one folder is needed for “Excluded: Ti/Ab,” but sub-folders are used within “Excluded: Full Text.”

Removing excluded citations
Remove excluded citations in the same way you removed duplicates. Working within the “Included” folder, select exclusions and move them to the appropriate folder. Then, remove these files from the “Included” folder. If you wish to move a citation into an exclusion sub-folder (e.g. “Age Group”), you should also move it into the parent exclusion folder (e.g. “Excluded”) in order to maintain consistent citation count data.

Tip
Beware! Once an action is completed in RefWorks, it cannot be undone – you will have to undo the changes manually. Double-check before you click to make sure you are performing the correct action.