Organising Systematic Review Citations Using Mendeley

Overview

Create a suite of folders and sub-folders for each project

One database at a time, import references into designated database sub-folder

Move all citations into the "Included" folder

Identify duplicates, drag them into the "Duplicates" folder, and delete from the "Included" folder

Identify citations for exclusion, drag them into the appropriate exclusion folder, and delete from the "Included" folder

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 Mendeley, which will automatically order them.

Figure 1: Folder structure

Step 2 – Import your references
Working one database at a time, import references into the appropriate folder in Mendeley. For example, to import
PubMed citations, select the PubMed folder, and then click the Add Files button. The citations will then be imported directly into the PubMed folder, and will also be included in all parent folders (“All Results,” “Project 1,” and “All Documents”). Repeat this process for each database.

Step 3 – Move all citations to the “Included” folder
Move all citations 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 Check for Duplicates tool, or can be found manually.

Using the Check for Duplicates tool
Mendeley provides a tool for removing duplicates, which can be found under Tools -> Check for Duplicates. Mendeley has created two short video tutorials explaining how to find and merge duplicates, located here [1]:

Figure 2: the Check for Duplicates tool

Tip
When checking for duplicates, be sure to select 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, drag duplicates to the “Duplicates” folder. The citation will remain highlighted in the “Included” folder, so you won’t lose track of it.

2 – Once a duplicate has been added to the “Duplicates” folder, delete 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.
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, drag exclusions to the appropriate folder. Then, delete these files from the “Included” folder. Citations moved into sub-folders will automatically be included in its parent folder. For example, if a citation is excluded because it is the wrong study type, dragging the file into the “Study Type” folder will also automatically move it into the “Excluded: Full Text” folder.

References