EndNote for Systematic Review

About this Guide
There are a variety of ways to manage references for research projects and systematic review. This guide does not prescribe a methodology but it describes some EndNote functions which may assist with the methods you have chosen.

It is assumed that you have some basic knowledge of using EndNote.

It is not possible to describe all functions in a single guide. If you don’t find what you need, try some of the other guides and videos available at http://libguides.stir.ac.uk/endnote and use the EndNote Help.

Backup your EndNote Database
Before making any changes in EndNote (especially removing duplicates, changing fields etc.) it is important to take a backup.

Click File and use either Save a Copy or Compressed Library (.enlx). Further details available at http://libguide.stir.ac.uk/EndNoteBackup or use EndNote Help.

Customise the Reference Pane
EndNote typically displays: Read/Unread Status, File Attachments, Author, Year, Title, Rating and Last Updated Status.

Change the fields as required e.g. show journal titles or page numbers to aid scanning for duplicates.

1. Click Edit and select Preferences.

2. Choose Display Fields and select fields you want from the drop down lists.

3. If you want fewer than 10 fields, choose [Do not display] for those remaining.

4. Click OK.
Organise with Group Sets and Groups

Decide on a folder / subfolder structure for your references. In EndNote these are called Group Sets and Groups. For a systematic review consider groups for your inclusion and exclusion criteria and other variables in addition to database searches.

Use the Groups menu to create Group Sets and Groups.

You can also right-click on any Group Set to create a Group within it.

**Important:** move your newly added references to the correct Group immediately.

Update the Name of Database and Database Provider Fields

[Change, Move Copy Fields]

When you export references to EndNote the Name of Database and/or Database Provider fields may be blank or might give an abbreviation that is unclear.

You might use these fields during your review process e.g. to aid decision on which duplicates to delete, so it is best to update them when they are added to EndNote.

1. Export references from a database to EndNote and they will be added to the Imported References group.
2. Although you can update the fields at any time, it might be helpful to do this before moving your Imported References to the correct group.
3. Click on the Group containing the references to be updated e.g. the Imported References group.
4. Check a few references and decide if any fields need to be updated.

In the following example the Database Provider field already includes ‘EBSCOhost’ it but it may be helpful to replace the abbreviation in the Name of Database field with the full title.
5. Highlight the references to be updated (Ctrl + A to select all in the Group).
6. Click the Tools menu and select Change, Move Copy Fields.

   a. Select Name of Database from the drop-down list.
   b. Select the option to change e.g. Replace whole field with.
   c. Type your text in the box and click OK.

Remove Duplicates
There are a number of ways to remove duplicated. See separate guide at http://libguides.stir.ac.uk/endnoteadvanced for more details.

Annotate Records Using Custom Fields
Rename and use Custom Fields to annotate or tag your records e.g. with inclusion/exclusion criteria, whether to obtain full text, reviewer comments etc.

1. From the Edit menu select Preferences
2. Choose Reference Type from left menu.
3. Click Modify Reference Types.
4. Scroll down to the Custom fields and enter the name(s) you wish to display.
5. Click Apply to All Ref Types, then click OK.
6. The customised fields will appear in all references – e.g. see Criteria 1 in the screenshot below.

Note: Some EndNote installations already include customisations. The example above already included Legal Note, PMCID, NIHMSID and Article Number. Change existing customisations if you are certain you won’t need them.

Choosing Names for Custom Fields
Customised field names display in your references making it easier to annotate your records correctly. However in Search criteria the original field names are shown e.g Custom 1 etc.

Consider using a naming system to reminds you of the original field name.

Instead of the name ‘Criteria 1’ for example, you might call the field ‘Custom 3–Criteria 1’, or ‘3.Criteria 1’.

Use Annotations Consistently
Smart Groups depend on consistent annotations to retrieve all relevant references e.g. if your Smart Group is to filter all the records with the words ‘obtain full text’ it will miss out any that just say ‘full text’ or ‘obtain FT’ etc.

Smart Groups to Filter References
Smart Groups are generated and updated dynamically based on search criteria e.g. you could search for and create a group of all references flagged to be excluded from a systematic review or those flagged to obtain full text.

1. From the Groups menu, select Create Smart Group.
2. Enter a name for the group, build your search strategy and click Create.

Every time you add or edit new reference which meets the search criteria, it will automatically be added to your Smart Group.