Lecture #4: Reference management for systematic reviews

Nicole Askin, MLIS

Round table

- ▶ What OS and version of EndNote are you using?

- ▶ What is your experience with reference management software?

Objectives

- Understand the advanced features of EndNote used for systematic reviewing
- Discuss reference management in the screening process
- Use the techniques discussed to populate a PRISMA flow chart

Citation managers

- Tools to organize, store and retrieve citations
- EndNote is recommended for this course (and for SRs in general) because of its advanced features related to groups, deduplication, etc
- HOWEVER, free options like Zotero and Mendeley are useful in other contexts

Citation manager comparison

EndNote	Zotero	Mendeley
• Costs money • Retrieve citations via direct export or manual import • Embed PDFs via Find Full Text • Strengths: customization, support, library size	• Free (can purchase storage) • Includes browser plugin to capture citations in addition to import or manual entry options • Automatically grab PDFs and archive web pages • Strengths: web sync, multiple formats	• Free (can purchase storage) • Includes Web Importer in addition to import or manual entry options • Very useful for organizing and annotating PDFs, retrieving citations for PDFs • Strengths: PDFs, social networking

Deduplication

▶ Duplicate *papers*, not duplicate *studies*

▶ John Smith (2020). "Appropriate prescribing of β-lactam antibiotics". *Am Fam Physician* 1(1), pp. 22-5

▶ Smith, J. (2020). "Appropriate prescribing of beta-lactam antibiotics". *American Family Physician*, pp. 22-25.

PRISMA 2020 flow diagram for new systematic reviews which included searches of databases, registers and other sources

Identification of studies via databases and registers

Identification

Records identified from*:
Databases (n =)
Registers (n =)

→ Records removed *before screening*:
Duplicate records removed (n =)
Records marked as ineligible by automation tools (n =)
Records removed for other reasons (n =)

Screening

Records screened (n =)

→ Records excluded** (n =)

Reports sought for retrieval (n =)

→ Reports not retrieved (n =)

Reports assessed for eligibility (n =)

→ Reports excluded:
Reason 1 (n =)
Reason 2 (n =)
Reason 3 (n =)
etc.

Identification of studies via other methods

Records identified from:
Websites (n =)
Organisations (n =)
Citation searching (n =)
etc.

Reports sought for retrieval (n =)

→ Reports not retrieved (n =)

Reports assessed for eligibility (n =)

→ Reports excluded:
Reason 1 (n =)
Reason 2 (n =)
Reason 3 (n =)
etc.

Included

Studies included in review (n =)
Reports of included studies (n =)