

Using EndNote to screen your Systematic Review Literature to PRISMA reporting standards

In the first video we showed you how to:

- Set up a separate EndNote library specifically for your systematic review
- Use the 'group set', 'custom group', and 'groups from groups' function to track the deduplication of your systematic review library
- Alter the display fields as needed.

The two EndNote videos in this tutorial demonstrate the features in EndNote that can be adapted and used to screen your literature to PRISMA reporting standards.

For demonstration purposes, the library I will be working with has a small number of records and we will begin where Video One finished deduplicating.

We started with 97 records in our 'All-references' standard group. 37 duplicates were identified in the first video and placed into the 'Duplicates' folder, leaving us with 60 unique records in the 'Unique Records' group.

We are now ready to start the next level of screening or Title and Abstract screening.

To begin, create a new group set. I am naming this group set 'Title Abstract Screen'.

The first standard group we create in the 'Title Abstract Screen' set will hold the unique records that were identified following deduplication.

I will name this standard group 'Title Abstract Screen Total' and I will populate this group with the records in the 'Unique Records' group. To bring the unique records across, press CTRL+A to highlight all the records in the 'Unique Records' group and then drag these records into the 'Title Abstract Screen Total' standard group. This group is static; the number of records held in this group will not change.

Next, I want to create a running total group that will allow me to track my progress as I screen. Before I can do that, I need to create two more standard groups. The first standard group I will

call Include 'TIAB', the second standard group I will name 'Exclude TIAB'. These two groups will remain empty until I begin my Title Abstract screening. To keep my groups in order, I have renamed the 'Title Abstract Screen Total' group to include the number one. This forces the total group to the top of the list.

Now I ready to set up my 'Title Abstract Running Total' group. This group is not static, the number of records held in the group will adjust as records are screened and either included or excluded based off my inclusion and exclusion criteria.

To create the running total group, use the 'Create from groups' function.

Select 'Groups' from the menu, select 'Create from Groups'.

In the pop-up box, I am calling this group 'Title Abstract Running Screen'.

In 'Include References' select 'TIAB Screen Total' but NOT 'Include TIAB' and NOT 'Exclude TIAB'.

Select 'Create'.

At every stage of screening in EndNote it is good practice to do a compressed file backup of your EndNote library. Include the date and time in the filename of your library backup and place your backup file in at least two different locations.

For large systematic review libraries with thousands of records, this is essential.

If you make a mistake setting up your groups or if your library corrupts, you can access the most recent backup of your EndNote screening library without having to recreate your library from the beginning.

My Title Abstract screening groups are set up and I can begin screening.

This can be done wholly in EndNote provided the abstract was imported exported as part of each record from the database.

Carefully check the title and the abstract against your inclusion and exclusion criteria and move the record to the appropriate group.

As the record is either included or excluded the number of records in the running total group is adjusted and decreases by one. Note that the number of records in the 'Title Abstract total' group remains the same.

Records that are included will progress to full text screening. If you are unsure if a record should be included or excluded based on the record's title or abstract, send the record to include group so it can be critically examined at the full text screening level.

Once you have completed your title and abstract screening, you can begin full text screening.

Again, set up a new group set for the next level of screening. I am calling this group set 'Full Text Screen'.

In this newly created set, create your standard 'Full Text total' group. This group is populated with records from the 'Include TIAB' group. Press CTRL+A and drag the records across. The number of records in the 'Full Text total' group will not change.

Like we did at title abstract screening level we will create a 'Full Text Running Total' group to track our progress. Before we can do this we will need to finish setting up the standards groups first. At the full text screening level you need to list the REASON for exclusion and your group names will reflect this. Create your 'Exclude Full Text' groups and your 'Include Full Text' group.

Now I ready to set up my 'Full Text Running Total' group. This group is not static, the number of records held in the group will adjust as records are screened and either included or excluded based off my full text examination of each record.

To create the running total group, use the 'Create from groups' function.

Select 'Groups' from the menu, select 'Create from Groups'.

In the pop-up box, enter in the name of this group. I am calling this group 'Full Text Running Screen'.

In 'Include References', select 'Full Text Screen' but NOT any of the 'Exclude' groups or 'Include' group.

Select 'Create'.

My Full Text screening groups are set up and I can begin.

At this level it is useful to have the full text pdf file attached to each record. EndNote has an annotation function that may be helpful when examining the record at full text.

Detailed instructions on attaching pdf files, finding full text, and using the annotation features can be found in the [EndNote Basic Tutorial](#).

As each record is screened bring the record into the appropriate group.

Once finished, enter the numbers into your PRISMA flow diagram.

EndNote has some useful additional features that can assist with the screening process.

You can check to see what groups a record belongs by looking at the Reference Summary. In the menu bar, click on 'References' – select 'Reference Summary'.

You can also enter information into individual fields in an EndNote record. You can enter details of screening decisions, individual reasons for inclusion or exclusion or any information that will facilitate efficient screening of your systematic review literature.

For a single record, highlight the record, select 'Edit', the field you require and enter the information. Fields such as NOTES, THEME and Research Notes are ideally suited to this purpose - they are normally empty, fully searchable and are not part of the bibliographic record. Save any changes you make to the record.

You can also bulk edit records in a group. Select the group and highlight all the records in this group using CTRL+A. From the Menu select 'Library' – Change / Move / Copy fields.

Select the field, for this example I am using 'Research Notes'. Again, this field ideally suited to this purpose. You have several options, if you have already entered information into this field you can place your entry before, after or to replace text that is already in this field. For this example I am selecting Insert after field's text.

Individual fields in each EndNote record are fully searchable.