ENDNOTE ONLINE

Tips for using it for systematic reviews

EndNote will help you manage your references and provide the figures you need to report your results in a PRISMA flowchart. For more guidance on doing a systematic review see our guide which includes a link to the PRISMA flowchart template: libguides.reading.ac.uk/systematic-review

PREPARING YOUR ENDNOTE LIBRARY

Before you start, remove all existing references from your EndNote library, or create a new account using a different email address. Remove references by marking them and moving to Trash. Empty your Trash once finished. This will give you an empty library to ensure the reference numbers you will need to report in your PRISMA diagram are accurate.

CREATING GROUPS

Putting your references into groups helps you to manage them. When doing a systematic review create a group for each database you are searching, and create groups for ‘Include’, ‘Exclude’ and ‘Undecided’.

1. To create a group, click on the ‘Organize’ tab and select the ‘Manage my groups’ link.

2. Click on the ‘New Group’ button, enter your group name and click OK.

3. To copy references into your group click on the ‘My References’ tab. Select the references you want to move to a group by clicking the checkbox box to the left of each reference.

4. Click the down arrow next to the ‘Add to group...’ box.

5. Select your group. The selected items are copied to the group and the number of items in the group is displayed next to the group name.

When you are importing references from PubMed, Summon and many other databases select the relevant group as you import the references, instead of having to move them afterwards.

DOWNLOADING FROM DATABASES

If relevant start with Web of Science – it gives you the best quality records and full journal names. When downloading from Web of Science if you want to download all the results just click on ‘Export’ and ‘EndNote online’ and you can download up to 500 at a time.

Once the references are in EndNote select them all and add them to your ‘Web of Science’ group. If you have other references already in your library, use the sort option on the right of the screen to select ‘Added to library – newest to oldest’. you should then be able to select the ones added from Web of Science today and move them into the relevant group.
See our EndNote Online guide for information about downloading from other databases
libguides.reading.ac.uk/endnote/online.

DEDUPLICATION

Once you have downloaded all the references from all your databases you will need to remove any duplicates. Make sure you have a note of the numbers of references downloaded from each database before you do this and a note of the total number of references in your library! Add this number to the top of your PRISMA diagram.

Deduplication tool

First try the Deduplication tool under ‘Organize’ > ‘Find duplicates’. EndNote will display any duplicate entries and select one or more instance of each for deletion. You can change the selections. When you are ready click ‘Delete’. These will be moved to the trash folder – leave them there until you finished deduplicating so you have a record of the number removed by deduplication.

If you have a choice between two references keep the one from Web of Science because the journal name will be in given in full.

Manual deduplication

After using the deduplication tool scan your list of references for other duplicates (often Pubmed references will not match due to the abbreviated journal names). Mark any duplicates and click ‘Delete’

Finished deduplicating?

Once you have finished deduplication take a note of the number of references in your Trash and the total number of references in your library. You will need to report these numbers in your PRISMA diagram.

SCANNING YOUR REFERENCES

Read the title and abstract for each reference and move it into the ‘Include’, ‘Exclude’ or ‘Undecided’ group. Use the ‘Research notes’ field in each reference to record your reason for excluding a reference. If you can’t see the Research notes box click on ‘Add empty fields’ at the top left of the reference. At the bottom of the reference you will see the ‘Groups’ section – click on the arrow to open up a list of your groups and select the ‘Include’, ‘Exclude’, or ‘Undecided’ group as appropriate.

Make a note of the numbers in each group after your initial screening as you will need to report this in your PRISMA diagram. After your initial sort you will need to get the full articles to read to make a final decision.
GETTING & ATTACHING FULL-TEXT PDFS

Once the references are in your library you can try to access the full-text of the article by clicking on ‘Search for Item at Reading’ button under each item. You may then be able to download the PDF of the article. You can then attach this to the reference in EndNote by clicking on the paper clip icon under the reference and selecting ‘Attach files’.

As you read the papers move any references for exclusion into the ‘Exclude’ group, noting the reasons in the ‘Research notes’ field. You should not have any left in the ‘Undecided’ group after this step!

Make a note of the final numbers in the ‘Exclude’ and ‘Include’ groups.

If you are unable to access the full-text via the ‘Search for item at Reading’ button, try a search on Google Scholar. If you are still unable to access the full article apply for an inter-library loan – see www.reading.ac.uk/library/inter-library-loans for more information.

ENSURING CONSISTENCY

Once you have your final papers for inclusion check the references, especially the format of the journal names and make sure they are all given in full, with no abbreviated names. Edit the references to put the full names if necessary. Also check the capitalisation of article titles, to ensure they are all consistent – ideally these should be in lower case apart from the first letter of the first word, and any proper names within the title.

Look out for any other inconsistencies once you have inserted the references in Word. If you spot any, edit the reference in EndNote, remove and reinsert the reference in your Word document.

Further information & help

For more information and help see libguides.reading.ac.uk/endnote/online or contact your Academic Liaison Librarian www.reading.ac.uk/library/liaison.