Managing References for Systematic Review using Legacy RefWorks

**Step 1 Export/Import references into Legacy RefWorks**
- Organize your references into folders (Ex: Medline, CINAHL, Embase etc.)
- Record the total # of references from the Statistics section on your RefWorks page. See: (Box 1)

**Step 2: Create a Second Legacy RefWorks Account**
- Import your references into this second account for screening
- Remove duplicates of the same article
- View ➔ Duplicates ➔ Close duplicates
- Record the total # of records from your RefWorks database See: (Box 2)

**Step 3: Initial Screening**
- Create 4 folders for Initial screening process (Exclude, Include - maybe get full text, Duplicates, Background)
- Review title and abstracts and sort records into folders
- Number of excluded ones (Box 3)
- Include – maybe get full text (Box 4)*

*The Include folder will contain abstracts which meet your inclusion/exclusion criteria OR articles which may meet your criteria but you need to read the full paper for more details.

**Step 4: Second Screening**
- Obtain full text articles for all records in the “Include – maybe get full text” folder. You can add articles to the database (approximately 100 attachments)
- Create folders for 2nd screening (Include, Exclude)
- Read full text articles and sort records into folders
- Second screen – Include
- Second screen – Exclude (Box 5)

Adapted by Sarah Parker, MLIS Candidate, University of British Columbia, with permission from Jackie Stapleton, University of Waterloo
PRISMA flow diagram can be found here: http://www.prisma-statement.org/statement.htm