Objectives

This workbook is designed to introduce Legacy Refworks citation management for a systematic review.

During this session we will review how to:

- Use Legacy Refworks for a systematic review
  - Screening using Legacy Refworks
  - Find and remove duplicate records

It would be beneficial if you are familiar with Legacy Refworks and these features:
  - Exporting references from a database into your Legacy Refworks account
  - Creating and organizing references into folders
Section 1: Using Legacy Refworks for Systematic Reviews

1. Stores all results from all literature searches
   a. References can be directly exported into Legacy Refworks from many databases
   b. Allows for easy detection and removal of duplicates
   c. Can store 100,000+ records

2. Aids in tracking references during screening
   a. Decisions can be recorded in folders

3. Simplifies the article retrieval process
   a. Folders can be created to indicate location or status
   b. Full text (in online journals subscribed to by the University of British Columbia or free online journals) can be accessed within Legacy Refworks
Once you have exported your references into Legacy Refworks, there are several steps that will assist you with your systematic review.

It is recommended that before you start your screen process, you create a second Legacy Refworks account and export all of your references into the second account. They will remain in the Not in Folder list. Furthermore, if there are two reviewers, it would be recommended that you each export all of the references into separate accounts. It will be easier to identify any discrepancies between your results.

Now that you have two Legacy Refworks accounts, you can use one for the screening and not disrupt the original imported references. This is a good practice to ensure that you do not eliminate a reference that you do not intend to.

In your second Legacy Refworks account:

- Customize your account view to show more than 25 records at a time.
- Removing duplicates will be a bit faster, since you won’t have to keep shifting pages.
  - Click on Customize on the right hand side of the page under “Quick Access”

- Change your References Per Page to a higher number than 25. Maximum is 500 references per page.
- Click Save Customized Settings.
Now you will remove duplicates.

- Click on **View**
- Mouse over **Duplicates**
- Select **Close Duplicates**

The duplicate with the higher Reference ID will already be selected. **Check to make sure these are duplicates before you delete them.** Often similar records that are not duplicates get listed here. This is why it is important to have your original account available to correct any errors.

- Select any duplicates that are not already checked.
- Click on the 'Delete' button to remove these records from the database.

**Record the number of duplicates you are deleting!**

After duplicates have been removed from your database you can then prepare to start screening.

Create 4 folders with the following names:

- **Exclude**
- **Include, Maybe – Get Full Text**
- **Duplicates**
- **Background**
Ensure there are no references in any folder when you begin screening.

The only folder that is automatically assigned is ‘Last Imported’. The references from your last database import may still be in there.

- To remove everything from this folder, click on the folder icon and then click on ‘Clear Folder’.

- Do all your screening from the ‘Not in Folder’ list.

As records are given a decision and put in a folder, they will automatically disappear from the ‘References not in a Folder’ list. You avoid having to keep track of where you left off.

- To view a full reference (including abstract), click on the magnifying glass.
Once you have reviewed the full reference & abstract, click on **Edit**.

(Note: Not all articles will have abstracts, depending on the type of article and what database it was imported from.)

On the ‘Edit Reference’ screen, use the **Add to Folder** drop-down menu to select which folder you want to move the article into.

Once you have made a decision, click on **Save Reference**.

Move to the next record by clicking on the ‘Next’ button at the bottom of the Edit window.

Alternatively, you can screen abstracts using this method:

- Click on the **Change View** menu and select **Full View**. This will allow you to view a list of articles and abstracts on one screen.

Continue reviewing by adding records to decision folders and moving to the next record.

Your screening will be complete when your ‘Not in Folder’ list is empty and all references have been assigned to a folder.
Section 3: Article Retrieval Using Legacy Refworks

Now that screening is complete, you will need to retrieve the full-text for references in the ‘Include, Maybe – Get Full Text’ folder.

When retrieving the full text of your articles, use additional folders to indicate the retrieval status of the full-text.

Put a zero at the beginning of these new folders so they automatically go to the top of the list. For example:
- 0: Woodward
- 0: electronic
- 0: ill (interlibrary loan)
- 0: obtained
- 0: photocopy at library

- Click on the UBC eLink to find the article’s location.

If you cannot find the PDF version through the library, it may be available as a print copy in the library.

If not available through the library, you can obtain it by requesting an InterLibrary Loan (ILL).
**Note:** When you save the PDF file, you can attach it to the reference in your Legacy Refworks account by editing the reference.

**Hint:** When you save the PDF file to your hard drive, rename the file to include author’s name and the Legacy Refworks Reference ID number.
- Example: Albrecht_289.pdf

**There is a 5 GB limit for attachments, but it is recommended that you keep it to about 1 GB or the equivalent of 100 attachments.**

---

**Need Help with Legacy Refworks?**

- Legacy Refworks 2.0 Tutorials

- University of British Columbia Legacy Refworks Guide

- Visit the library information desk for assistance or sign up for a Legacy Refworks workshop
  [http://woodward.library.ubc.ca/](http://woodward.library.ubc.ca/)