Using Excel to Track Your SR Searches

An Excel workbook ([http://tinyurl.com/m6w4q8](http://tinyurl.com/m6w4q8)) has been created to help you track all of your searches for your systematic review, including the results, duplicates, and search strategies. This handout describes the workbook and how to use it.

Workbook Description

The workbook is composed of 3 major sections. The first section is for tracking searches from databases. It has 5 database-specific worksheets and 6 worksheets for databases not in the group of five. There are two worksheets that track database items rejected (with places to indicate why) and compile database results. The second section is for tracking search results from other sources, such as hand searching of journals, bibliographies from articles, Google, and citation tracking using Scopus or Web of Science. The third section has just one worksheet which contains the flowchart which is modeled after the PRISMA guidelines.

Description of Database Worksheets

Along the bottom of the workbook you will see individual tabs with database names. Click on the name of the database you searched. Each database worksheet contains the following fields: Data Source; Limiters; Results, a section to record your search strategies and a section to track duplicates.

Data Source

The information on lines 1 and 2 is already filled in. Date searched: Enter the latest date that the database was searched. If you have an auto alert set up, the latest date would be from the last auto alert that you received. Database update: Some databases (most notably those from Ovid) indicate when the database was last updated. Be sure to include that information as well.

Limiters

English only? defaults to y. Change this to n if you are including other languages. Dates: Specify the range of years included in your SR. Be sure to have a clear rational as to why you chose that range of years. Did a prior SR cover the early years through 2003? Was there a change in a medical procedure or funding for medical expenditures? Publication types: Some databases include dissertations, books, book chapters, and conference proceedings in addition to journal articles. Also, most cover research studies from refereed journals, editorials, comments, corrections, guidelines, etc. Indicate what types of publications were included in your strategy.
Results

**Items found**: Enter the total number of items found.

**Inner duplicates**: After importing the citations into RefWorks (or some other citation manager) check for duplicates. Some databases have duplicates within them; record the number in cell C10.

**External duplicates**: These are found by comparing the results found in one database with the results found in another. If you are using RefWorks, be sure you check for duplicates after each import. As you delete a page of duplicates, record the number of duplicate items in the column to the right of search results. A formula in cell C12 performs the calculations.

**Text of Search Strategy**

Each search strategy should be copied and included in your final write-up. There is a space to copy and paste your search strategies below search results.

Brief instructions can be found in each worksheet describing how to retrieve a copy of the search strategy depending on the vendor or interface.

This is data that will be used in your thesis or dissertation so it is helpful to make the search strategies appear uniform across databases. In the example to the right, the Ovid Medline search was retrieved by going to Saved Searches and clicking on the eye icon. The search strategy (along with the search strategy name) was highlighted and copied.

This was then pasted into **Notepad** and a tab space was inserted between the line number and search text.

Lastly, the search strategy was copied and pasted into the space provided in the database spreadsheet. The saved search name was copied and pasted separately. By adding a tab between the line search number and the search text, the line number will be in one column and the text in another.

When you are ready to copy and paste this into your final document (i.e. article, thesis, dissertation), a two-column table will be created with the exact search strategy terms used. All you will need to do is adjust column widths in each table and decide if you want a border or not around the table cells. Otherwise there should not be any editing required.

This will save you a great deal of headache at the end of your project when you need to focus on the writing process. Do it **up front**; not when you are in a critical stage of publishing!
DB Items Rejected ITEMIZED or DB Items Rejected TOTALS: Use one or the other, NOT both

These worksheet are set up to calculate the number of items rejected (either abstract or fulltext) and subtract them from the number of items found. Use the former if you plan on itemizing by database the reasons why citations and articles are rejected. Use the latter if you are going to record just the bottom-line number by reason.

In this example, a total of 172 items were found in an Ovid Medline search and 128 items were rejected after reading the abstracts. The total number of abstracts rejected is 153. (The number of items in your RefWorks Abstracts—No folder should also be 153.)

After reading the full text of each item, indicate in RefWorks those articles that were rejected and include the reason why. This data is then input into the Full Text Rejected section of the same worksheet you used for abstracts. Note that there is a column for # of FT items that were not available for review.

DB Results Table
This worksheet gives a synopsis of the results of each search. It shows database information, limits, duplicates, and total values for abstracts and articles rejected and remaining. You shouldn’t input any data into this worksheet as the cells are automatically populated with data from other worksheets.

Don’t see your database in the workbook?
There are 6 worksheets that have been labeled Your_db1, Your_db2, Your_db3, etc. These have been created for databases not identified in the table. To change the name of the worksheet, right-click on the worksheet tab and choose Rename.

Enter the new name of the worksheet, then <Enter>.

Be sure you remember to change the Vendor and Database information in the Data Source fields as well.
Non-Database Searches
The worksheets for non-database searches do not have the same level of detail. Record only the number of full text items that were reviewed.

The Flowchart
The flowchart is used to see the progression of search results. It follows the PRISMA format (Moher D, Liberati A, Tetzlaff J, Altman DG, PRISMA G. Preferred reporting items for systematic reviews and meta-analyses: The PRISMA statement. Ann Intern Med. 2009;151:264-269). (http://www.prisma-statement.org/)

Data from the results tables is gathered in the flowchart, then calculations are performed to present a final number of items that met inclusion criteria in your systematic review.

A flowchart should be incorporated into your write-up. The image to the right was used by copying the screen using the PrtSc function. You can also create an image by using Snagit from TechSmith. The gridlines have been turned off for a better image. If you want the gridlines on, go to View to turn them on.

In this example, only 4 exclusion reasons were used but the flow chart has room for 6. Delete the rows that don’t have exclusion reasons listed. To do this, highlight the rows to delete, right click and select Delete. You may need to add a border at the bottom of the box with excluded items. You can also insert rows by right clicking but you would also need to insert formulas into the cells.

Questions?
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