

## Prepare Your RW Account for a Systematic Review

### Step 1: Create your RefWorks folders

Click on the **New Folder** icon. Once there, create a folder to hold your Excel workbooks and your paper. If you are working with another person, using a cloud-based system can simplify some of the logistics of sharing files.



### 0 Excel workbks & paper

Next, create a folder for **each database** you will search. The naming convention uses a “1” in front of each folder name followed by “a”, “b”, “c”, etc. in the order in which you search. Databases can include:

1a medline

1b pubmed

1c Embase

1d psycinfo

1e cinahl

As you screen titles and abstracts found through database searches, those items that will be considered for inclusion (i.e. labeled “maybe” in the Excel workbook) will be saved in the **2a Abstracts Maybe** folder.

### 2a Abstracts Maybe

**3a FT Yes** holds those items that, upon full text review, you deemed were eligible for inclusion.  
**3b FT No** holds those items that, upon full text review, you deemed were ineligible for inclusion.  
**3c FT ILL** holds those items that you were unable to easily retrieve and had to request through Interlibrary Loan. Once the item is available for full text review, it should then be saved in either the **3a** or **3b** folder.  
**3d FT Unavailable** holds those items that we unavailable in time to be included for review.

3a FT Yes

3b FT No

3c FT ILL

3d FT Unavailable

As you review relevant articles, you may also want to do extra follow-up using those articles.

**4a bibliographies** holds *unique* items found by searching the bibliographies of relevant articles.  
**4b authors** holds unique items found when searching for additional articles written by authors of studies you are including.  
**4c citation tracking** is the process of looking up highly relevant articles to see who has cited them.  
**4d hand searching** is the process of checking individual issues of *select* journal titles.

4a bibliographies

4b authors

4c citation tracking– scopus

4d hand searching

**Background** and **discussion** are for those citations that you might use in either the introduction or the discussion sections of your paper.

**For next article** holds those items that are really interesting and may serve as a starting point for your next paper.

Background

Discussion

For next article

### UTSPH Library

1200 Hermann Pressler Dr.

Houston, TX 77030

Circulation Desk: 713.500.9121

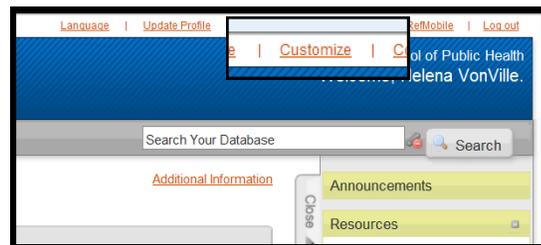
Reference: 713.500.9129

OR 713.500.9131

Virtual Reference Assistance: <http://tinyurl.com/libanswers>

## Step 2: Customize your account

Along the top of the RefWorks window, select **Customize**.

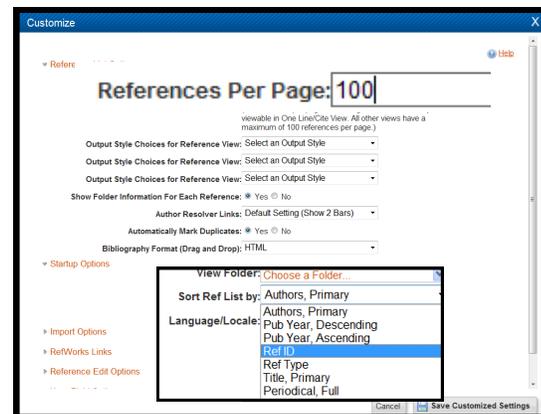


### Reference List Options: References Per Page: 100

This determines how many citations per page will be shown. Use an even number as it makes checking for duplicates much easier.

### Startup Options: Sort Ref List by: Ref ID.

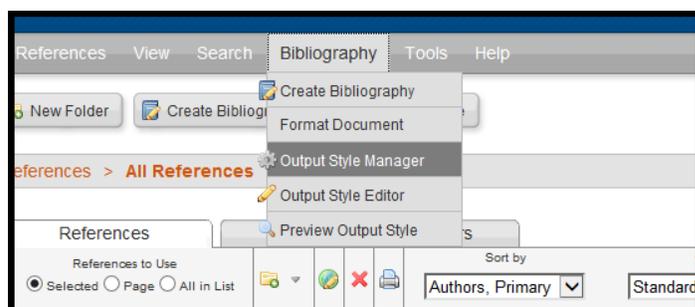
This forces the citations to appear in Ref ID order anytime you login. It makes it easier to find citations to move them after screening.



Use the *Excel Workbook for Tracking Systematic Review Search Strategies & Results and Screening Titles & Abstracts* to screen titles and abstracts and track all of your methods data. You will also need to add an output style to your list of favorites.

### Add the “Tab-delimited style with Ref ID Title Abstract” to your Output Styles list.

1. Roll your cursor over **Bibliography**.
2. Click on **Output Style Manager**.
3. Enter **tab** in the search box; click **Search**.



4. Scroll down until you see **Tab Delimited with Ref ID Title Abstract (NOT Tab Delimited\*)** in the **List of Output Styles**; click on it, then click on right facing green arrow to add it to the **Favorites** list.
5. Click on the **X** (upper right corner of blue bar) to close the **Output Style Manager**.

