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 workbs & 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.

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.

**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.
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.