INTRODUCTIONS

How much experience do you have with EndNote?

Any particular questions or things to focus on in this workshop?
STEPS IN A SYSTEMATIC REVIEW

- Formulate question
- Develop protocol
- Conduct search
- Select studies
- Appraise studies
- Extract data
- Analyze results
- Interpret results
Objective: Learn to use EndNote v8 and Rayyan for managing and screening systematic review citations.

• Why use EndNote? Why use Rayyan?
• Best practices for organising EndNote Libraries
• Importing records and prepping an EndNote Library for screening
• Screening references using Rayyan
WHY ENDNOTE?

EndNote is the gold standard reference management system for systematic reviews.

**Smart groups** allow references to be sorted and filtered automatically based on pre-defined criteria

- **Custom fields** (#1 – 8) allow users to add additional metadata to references
- Handles large numbers of records
ENDNOTE DOWNSIDES 😞

• Can be intimidating to learn and use!
• Cost $$ (free for university staff, but colleagues at other institutions may not have a subscription)
• Difficult to share libraries between teams (especially at other institutions)
• Saving to cloud-based systems sometimes cause data problems! (e.g. Dropbox, OneDrive)
WHY RAYYAN?

Rayyan is a screening software for managing the citation selection process.

https://rayyan.qcri.org/

• Free
• Simple user interface
• Allows double-blind screening or open screening
• Allows users to add custom labels, highlight relevant/non-relevant words
• Offline use, mobile app, predictive technology…
KEEPING ENDNOTE ORGANISED!
PRISMA FLOW DIAGRAM

Records identified through database searching (n = )

Additional records identified through other sources (n = )

Records after duplicates removed (n = )

Records screened (n = )

Full-text articles assessed for eligibility (n = )

Studies included in qualitative synthesis (n = )

Studies included in quantitative synthesis (meta-analysis) (n = )

Records excluded (n = )

Full-text articles excluded, with reasons (n = )

Title/Abstract screening in Rayyan

Full-text screening in Rayyan (or EndNote)

“Includes” exported from Rayyan to EndNote

CITATION MANAGEMENT

Master library (all references from all databases)

De-duplicated library

Staying organized throughout the process helps when writing the final report!
MANAGING ENDNOTE LIBRARIES

• Every EndNote Library consists of a .enl file and a .data folder. They must have the **exact same name** and be located in the same folder or the library will not open!

  ![Folder System Example](image)

  

• Consistent folder systems and filename systems are important

  ```
  Project-Name_Master_Date.enl
  Project-Name_Master_Date_BACKUP.enlx
  ```
# SHARING ENDNOTE LIBRARIES

<table>
<thead>
<tr>
<th>Sharing Options</th>
<th>Pros</th>
<th>Cons</th>
</tr>
</thead>
<tbody>
<tr>
<td>EndNote sharing (web)</td>
<td>No desktop version needed; simultaneous access and editing; can share with collaborators cross institutions; “free” version available</td>
<td>Can only use one library; only basic functionality (e.g. no smart groups); only group-level sharing</td>
</tr>
<tr>
<td>EndNote sharing (desktop)</td>
<td>Can share whole library (up to 100 collaborators); simultaneous access and editing; can share with collaborators cross institutions</td>
<td>Can only use one library; need EndNote x7 or x8 versions</td>
</tr>
<tr>
<td>Access through network drive</td>
<td>Can share multiple libraries with unlimited collaborators</td>
<td>Asynchronous access only; can only share with collaborators at University of Plymouth; potential data corruption</td>
</tr>
<tr>
<td>OneDrive/Dropbox/cloud-based storage</td>
<td>Can share multiple libraries with unlimited collaborators; can share with collaborators cross institution</td>
<td>Asynchronous access only; potential data corruption</td>
</tr>
</tbody>
</table>
CREATE A COMPRESSED ENDO NOTE LIBRARY (GOOD FOR BACKUPS!)

1. File → Compressed Library
2. Click “next”
3. Save and send the .enlx (compressed) file

To open a compressed library, double-click the .enlx file to uncompress, then click the .enl file to open.
UPDATING REFERENCES

To find additional reference information (metadata):

• Ctrl + A (to select all references), then “references” → “find reference updates”

• This is useful when downloading references from google scholar (which comes with only a few fields)

• Tip: click “update empty fields” (a pop-up message will ask if you want it to automatically do this for the remaining references)

Find full pdf text:

• select all the references to be searched (or ctrl + a), then “references” → “find full text”

• best to do this while on campus as it will retrieve more records when using university IP address!

• Note: adding lots of pdfs to your library will slow it down significantly (and my make it crash!)
SHOW/HIDE FIELDS

EndNote contains many more fields than you need

• In the right-hand preview pane, click “hide hidden fields” to hide the junk!

• Right-hand click the reference list panel to select which fields to show or hide in the main window. Uses for this include:
  
  * to aid in deduplication (for example, by showing page number field)
  
  * “added to library” or “last updated” field to see what’s new or what you have added most recently
  
  * show a custom field (e.g. if you added the “reference source” to a field)
BATCH EDIT CITATIONS

Change field “label” to reference source

- Click “unfiled” group after each different database import
- Tools → Change/Move/Copy fields → Dropdown menu “Label” → type “PubMed” (or other database name)

Labelling the source of each reference can help reduce confusion in the later stages of the project!
GROUPS VS SMART GROUPS VS COMBINATION GROUPS

- **Groups**: drag and drop references into a folder
- **Smart groups**: pre-specify inclusion criteria (for example, label field contains word “PubMed”)
- **Combination groups**: pre-specify inclusion criteria (at the group level)

- **Pro**: Smart groups are more stable! They are less prone to user error and data corruption. Smart groups also automatically update when reference fields change.
- **Con**: Many smart groups can slow down your library!
SMART GROUPS

• Right-hand click in sidebar and select “create smart group”

A few uses…

• document reference source (e.g. pubmed, CINAHL)

• if screening directly in EndNote, use to automatically capture and sort screening decisions
Combination groups allow you to create smart groups out of previously made groups (any kind, smart or regular).

Use boolean logic (AND/OR/NOT) to combine groups.

Right-hand click a group and select “create from groups”.

A few uses…

- good for doing screening directly in EndNote (e.g. combination group for reviewer 1 includes OR reviewer 2 includes)

??
**IDEAS FOR SMART AND COMBO GROUP USES**

- separate multiple items with a semi-colon (example: retrieve any citation with any of the words anywhere in the title)

  ```
  Title ▼ Word begins with ▼ occupational; OT; therap*
  ```

- use * as a wildcard (example: retrieve any citation with any pdf notes)

  ```
  PDF Notes ▼ Is greater than ▼ *
  ```

- create a smart group based on the rating you have given an article

  ```
  Rating ▼ Is greater than or equal to ▼ ★★★★★
  ```

- use a smart group to search **full text** of attached pdfs for relevant phrases

  ```
  PDF ▼ Contains ▼ quality of life
  ```

  ```
  Any Field + PDF with Note ▼ Contains ▼ quality of life
  ```
OR, USE THE SEARCH BAR

- can convert searches to smart groups by clicking “options”
- “match words” = no truncation (i.e. if selected, typing “myalgia” would not return instances of “fibromyalgia”)
Steps
1. Batch edit all citations to put “pubmed” in label field
2. Create a custom group that includes any references with “pubmed” in the label field
3. Show the label field in the main references window (tip: right-hand click the top bar)
DE-DUPLICATE REFERENCES

When importing references from multiple sources, there will likely be duplicates

- To remove duplicates, click “edit” → “find duplicates” → press delete on keyboard (after checking to ensure they are true duplicates!)

- By default, EndNote compares author, year, title, and reference type fields to check for duplicates.

- Change which fields are compared by going to “edit” → “preferences” → “duplicates”

- Use an iterative process: first, remove “definitely” duplicates with strict criteria, then add looser criteria (e.g. only check “title”) and manually check results

For more information and a more detailed process:

PROCESSES RECAP

1. Create your master library with all references.
2. Label the source of every reference (and put in smart groups if desired).
3. Create a backup, lock it down, and hide the key!
4. THEN, de-duplicate.

Staying organized throughout the process helps when writing the final report!
USING RAYYAN FOR SCREENING
USING RAYYAN FOR SCREENING

• create free account at https://rayyan.qcri.org/
• create “new review” and import .ris file from EndNote
• invite “collaborators” to screen
New search for Systematic Review: Occupational Therapy and Fibromyalgia

Migration Guides

Supported formats

Upload references in one of these text formats:
- EndNote Export (download example.env)
- Refman/RIS (download example.ris)
- CSV (download example.csv)
- PubMed XML (download example.xml)

Additionally, you can embed any of the above text files into:
- Text (download example.txt)
- Microsoft Word (download example.docx)
- GZ compressed file (download example.ris.gz or evidencelive15.ris.gz)

Finally, you can group any number of the above files in a single ZIP archive (download example.zip)

- EndNote Desktop guide
- Mendeley Desktop guide
- Papers Desktop guide
- Microsoft Excel guide
- PubMed guide
- ScienceDirect guide
### 2017-02-21: Occupational Therapy and Stroke (test) [Blind OFF]

Showing 28 to 35 of 333 unique entries (filtered from 334 total unique entries)

<table>
<thead>
<tr>
<th>Date</th>
<th>Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015-01-01</td>
<td>Effectiveness of interventions for adults with psychological or emotional impairment after stroke: an evidence in...</td>
</tr>
<tr>
<td>2015-01-01</td>
<td>Cognitive remediation of attention deficits following acquired brain injury: A systematic review and meta-analysis</td>
</tr>
<tr>
<td>2015-01-01</td>
<td>Kessler Foundation Neglect Assessment Process uniquely measures spatial neglect during activities of daily living...</td>
</tr>
<tr>
<td>2015-01-01</td>
<td>Performance-based testing in mild stroke: Identification of unmet opportunity for occupational therapy</td>
</tr>
<tr>
<td>2015-01-01</td>
<td>The effect of differential training-based occupational therapy on hand and arm function in patients after stroke...</td>
</tr>
</tbody>
</table>

---

**Keywords for include**
- stroke: 291
- occupational therapy: 143
- trial: 59
- randomized: 52
- controlled trial: 41
- compared with: 37
- randomly: 32
- randomized controlled trial: 31
- randomly assigned: 16

**Keywords for exclude**
- trials: 22
- survey: 20
- review: 19
- cohort: 15
- longitudinal: 12
- observational: 12

---

**A multi-faceted knowledge translation approach to support persons with stroke and cognitive impairment: evaluation protocol**

**BACKGROUND:** Patients with cognitive impairments following a stroke are often denied access to inpatient rehabilitation. The few patients with cognitive impairment admitted to rehabilitation generally receive services based on outdated impairment-reduction models, rather than recommended function-based approaches. Both reduced access to rehabilitation and the knowledge-to-practice gap stem from a reported lack of evidence to support the integration of cognitive impairment knowledge into clinical practice guidelines. A comprehensive knowledge translation (KT) approach should be implemented and evaluated. It will be targeted specifically at the inter-professional application of the Canadian Occupational Performance Measure (CO-OP). CO-OP training combined with KT support is called CO-OP KT. The long-term objective is to implement CO-OP KT for individuals with stroke and cognitive impairments. Three research questions are posed: 1. Is the implementation of CO-OP KT associated with a change in rehabilitation clinicians’ practice, knowledge, and self-efficacy relative to implementation of CO-OP training? 2. Is the implementation of CO-OP KT associated with a change in patients’ performance in daily activities? 3. Is CO-OP KT associated with changes in patient satisfaction and self-efficacy?
A viewer can see all the articles in the review but cannot add, delete, label or include/exclude any.


Screening summary

95.2%

Owner:
Prof Zbyy Fedorowicz

Collaborators:
Doctor Abdulla Ibrahim

2567 minutes
92 sessions
ADDITIONAL ADVANCED FEATURES IN ENDNOTE
OUTPUT STYLES

Output styles control how references will appear in citations or bibliographies or when using the “copy formatted” command.

Select a style by using dropdown menu, then click “select another style”


Download custom University of Plymouth cite while you write style: http://plymouth.libguides.com/c.php?g=127887&p=861680
EDITING OUTPUT STYLES (PT 1)

Create a custom EndNote style or tweak an existing one for your needs.

To edit a style, click “edit” → “output styles” → “new style” OR “open style manager” to edit an existing style.
Tweak existing styles to fit your needs by manipulating these criteria.

You can change:

- sorting of output (by author, by date…)
- how in-text citations look
- how bibliography looks
- how footnotes look
- add an abstract or URL or your own custom notes before/after the formatted citation
USES FOR EDITING OUTPUT STYLES

• Intended use is for creating a formatted bibliography just the way you want (e.g. edit an existing style to make the title of a journal article **bold**). Or maybe the journal you’re submitting to has some really wacky formatting guidelines…

• Create a style for reviewing a bunch of articles in word (or printing out to review on the go). (e.g. Formatted citation, followed by the full abstract, followed by your own custom field)

• Create a style that outputs only the “accession number” field (which holds a PubMed/Ovid Medline PMID). A list of PMIDs can be very useful for data analysis! (e.g. PubReminer)

• ??
ANNO TATE PDFS

- highlight
- add comments
- ability to search PDF comments
- ability to display PDF with and without markup
REFRESHER ON GETTING READY FOR PUBLISHING

Using Cite as You Write
Using citation mark-up can conflict with other EndNote libraries!
Convert citations to plain text before sending document to avoid data conflicts
ENDNOTE RESOURCES

Screencast on using only EndNote for systematic review screening. Created by PenCLAHRC Evidence Synthesis Team in Exeter.
http://medicine.exeter.ac.uk/esmi/workstreams/informationscience/is_resources,_guidance_&_advice/

Thompson Reuters EndNote v8 training materials
http://clarivate.libguides.com/endnote_training/users/enx8

University of Plymouth EndNote Research Guide
plymouth.libguides.com/endnote

Your information specialist!
informationspecialists@plymouth.ac.uk
THANK YOU!