Using the CRS to manage systematic review searching

[Searching in your registry only](#)

[Searching bibliographic databases + your register and combining those results in the CRS](#)

Searching in your register only

Some CRGs will use their Specialised Registers as their main source for trial identification, with the possible addition of some top-up searches to ensure that any very recently-published reports are also identified. If study report identification activities centre on your register you will use the Search tab, which allows searching of all fields (including user-defined fields) and comprehensive MeSH search features. For more information on CRS search features see the *Searching in CRS* chapter in this guide: http://www.cochrane.org/sites/default/files/uploads/TSC/CRS/CRS-UG-Searching_in_CRS.pdf

Searching bibliographic databases + your register and combining those results in the CRS

Many review groups conduct individual searches of bibliographic databases and their specialized register then send a combined, de-duplicated set to the authors. The easiest way of dealing with this in the CRS is to create batches for each record set from the bibliographic databases. It will often be the case that one or more searches have been carried out for a review previously and it is possible to import these previous sets before conducting the new search to avoid records being sent to an author(s) again. To read in the back sets:

1. Export the previous search sets in tagged text format from ProCite, EndNote, etc (See *Exporting from reference management software:* http://www.cochrane.org/sites/default/files/uploads/TSC/CRS/CRS-UG-Export_frm_ref_mgmt_sftwr.pdf
2. Import these records into the CRS using the **Import Records** tab. Choose either *ProCite CRS Tagged Text* and *EndNote CRS Tagged Text* (a filter for Reference Manager will be available soon) to import the records.
3. From the **Action** menu select **Send marked records to author** (Ctrl+Shift+A)
4. Select an author from the drop-down list and check the box beside the review that is to be associated with the records. Make sure to check the **Mark as already sent** box which tells CRS not to send the records, just to mark them as already having been sent
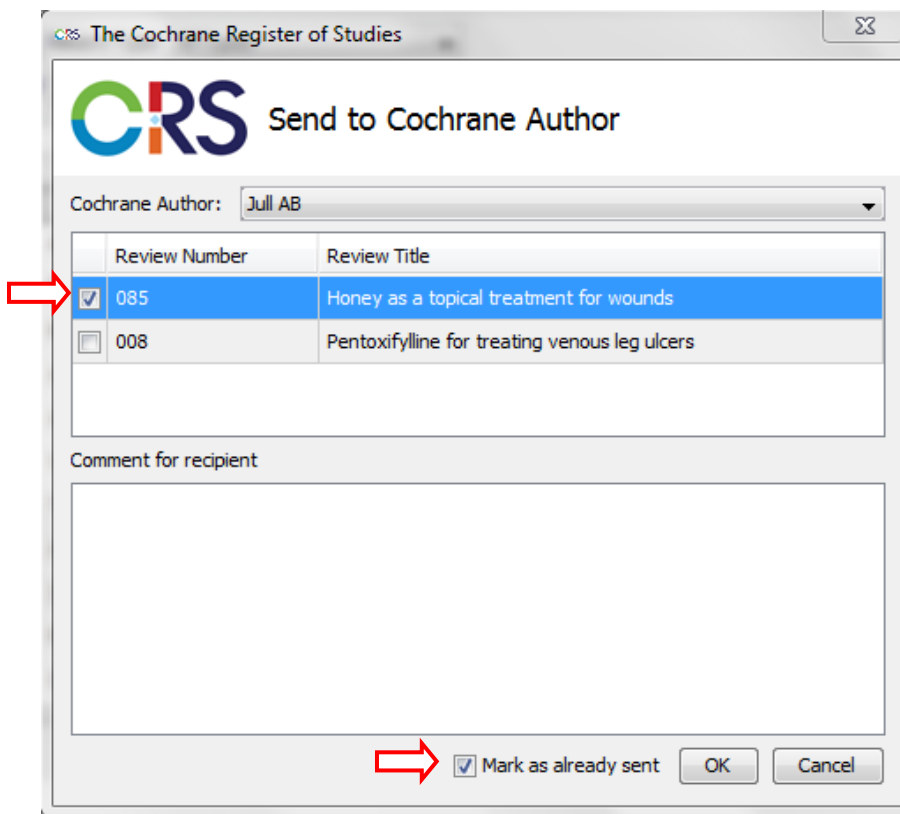
5. Now import the results from your current database searches. Each set of records will be imported as a batch. If each file is not given a batch name on import, the CRS will automatically create a name using the filename and the current date/time. If the file name is informative enough (e.g. 150_Webster_CENTRAL_Issue 12 2012) there will be no need to create a separate batch name. Naming the files consistently in a way which means they can be easily associated with the review will make it easy to find them and use them in subsequent searches. A good tip is to include something in the batch name that can be used in a search at a later date. There is a special search feature which allows batches to be identifed by entering characters from the batch name, e.g. searching for 150_Webser:CRSBATCHNAME would return all records in all batches that have "150_Webser" as part of the batch name.

6. Once all record sets have been imported, locate them again using the **Batch** feature on the **Browse** tab.
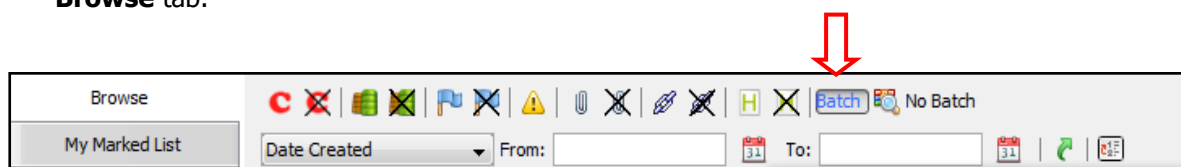
7. Mark each batch of records so that they appear in the **My Marked List** tab.

8. Run a search of the register (or segment if you prefer) and mark those records as well. The resulting set of marked records will be a combination of the records identified in external databases and the results of the register search.

9. Although deduplication is part of the import process there may still be a few duplicate records in the combined set. The default deduplication algorithm used on import cannot be adjusted but use the **Deduplication** tab to run another deduplication using a modified version of the algorithm

Remember to select the **Marked Records** radio button before running the deduplication. For more information on the deduplication feature see the *Deduplication* chapter in this guide: http://www.cochrane.org/sites/default/files/uploads/TSC/CRS/CRS-UG-Deduplication_2.pdf

10. Once there is a final combined set for the current searches, it is helpful to give this a batch name so the whole set can be easily located again later.

11. Send the marked records to the author (see steps 3 and 4 above) but ensure that the **Send marked records to author** box is not checked.

12. In the **Tracking** tab it is possible to filterby author name and status. The CRS will automatically exclude those records marked as previously sent to the author. The records with the status *PENDING* are the new records to be sent to the author. It is important to note that at this stage the records have not been sent to the author.

13. To deliver the records to the author mark the records and click on **Send All Selected**. The status will change to *READY TO SEND* and they will be sent to the author the next time the CRS is synchronised. You can send the records to yourself instead by changing the email address. For further explanation of the options available on the Tracking screen see the CRS Help file (http://www.metaxis.com/CRSHelp/Tracking.html)