

**2002 Stavanger Colloquium**  
**Workshop: Creating Trials Databases**  
**for Submission to CENTRAL Using ProCite Reference Management Software**

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**ProCite reference management software and the Stavanger ProCite workshop:**

ProCite reference management software is used for creating and maintaining trials registers. ProCite provides the greatest flexibility for importing references from an external source, and is the Cochrane Collaboration's preferred bibliographic software for managing references being submitted to CENTRAL. The purpose of this workshop is to assist Trials Search Coordinators and others with their ProCite database submissions to CENTRAL, and contribute to the quality of the CENTRAL database. The training provided in the workshop is largely based on instructions in the CENTRAL Management Plan's Guide for Submission of Hand Search Results to CENTRAL ("the Guide"). Several attached hand-outs will be used during the course of this workshop (See Appendix).

**ProCite workshop learning objectives:**

After completing the ProCite workshop, the participant should:

1. Be able to manipulate ProCite's associated Biblio-Link II software to insure MEDLINE records are imported into ProCite with all important MEDLINE data stored in the appropriate ProCite fields, consistent with the Guide;
2. Be able to search PubMed through ProCite and import MEDLINE citations into a ProCite database;
3. Be able to hand enter non-MEDLINE records into ProCite in a style consistent with the Guide; and
4. Be able to export search results from a ProCite register (both reference-based and study-based) to a RevMan review.

*The first three learning objectives above will be covered during the first one and one-half hours of the workshop. The fourth learning objective will be covered during the last half-hour of the workshop.*

**Step-by-step Instructions for Creating a ProCite database for Submission to CENTRAL:**

Steps 1-3 below provide guidance on the following aspects of the creation of electronic reference management databases for submission to CENTRAL: 1) setting up the Biblio-Link II PubMed configuration file so that MEDLINE records are downloaded into ProCite in the appropriate configuration; 2) searching PubMed and importing the relevant MEDLINE-indexed

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records into a ProCite database; and 3) hand entering non-MEDLINE records into a ProCite database in the format required by the Guide.

1. Follow steps 1a-1e below to prepare the Biblio-Link II PubMed configuration file so that MEDLINE records are downloaded into ProCite in the appropriate configuration for a Cochrane handsearch submission.
- 1.b Open Biblio-Link II: Start (bottom left of screen) -> Programs -> ProCite5 -> Biblio-Link II
- 1.b Open Biblio-Link II PubMed configuration file: File path: C:/Program Files/Procite5/Config/Pubmed.cfg. Only one database is defined for the PubMed configuration file. Double click this DEFAULT database, which is highlighted in blue.
- 1.c Change ProCite target workflow to Journal Long Form: Configuration (Drop down menu list on top left of screen) -> Database Information... In the Database Information dialog box, for the 'workflow' drop-down list, select Journal Long Form.
- 1.d In this step, you will modify the existing Biblio-Link II PubMed configuration file to transfer each MEDLINE field into the appropriate ProCite Journal Long Form workflow field, as specified in the Guide. The ProCite configuration file is set up to transfer most fields in the correct manner. However, the target ProCite field for some MEDLINE fields will need to be changed. To map the fields to meet the specifications below, you will highlight the field description, click modify and then use the ProCite field drop-down menu to select the specified target ProCite field. For any further questions about mapping fields, please see pages 26-27 from the Biblio-Link II Manual, Chapter 2: Getting Started: A Guided Tour (Attachment 1).
- 1.d.1 Modify the Biblio-Link II PubMed configuration file so that the following fields, from Table 1 from the Guide (Attachment 2), will be mapped to the specified target ProCite Destination Field:

<u>Description</u>	<u>Tag</u>	<u>Target ProCite Destination Field</u>
Journal Title (in original language)	TT	5
PubMed Identifier	PMID	6
Language	LA	8
Publication Type	PT	42
MEDLINE UI	UI	44

The PubMed configuration file is already set up to transfer all other fields in Table 1 into the correct ProCite target destination field.

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- 1.d.2 Some PubMed fields do not need to be transferred to your ProCite database. Set the following PubMed fields to 'Do not transfer': Comments (CM), Corporate Name (CN), General Note (GN), Coden (CD)
- 1.e Save the Biblio-Link II PubMed configuration file you have just modified, and close Biblio-Link II
- 2 In Steps 2a-2h below you will use the PubMed configuration file that you modified in Step 1 above to transfer PubMed records directly into ProCite. Locate the packet with the title page 'Hard copy reports for ProCite database creation' (Attachment 3). This packet includes the MEDLINE indexed reports that will be searched on PubMed directly through ProCite and imported into a permanent ProCite database. [Note that only journal articles and letters to the editor are generally included in MEDLINE. Abstracts from conference proceedings and non-MEDLINE journal articles are not included in MEDLINE and citations for these reports will be hand entered later, as described in Section 3 below.]
  - 2.a Open ProCite: Start → Programs → ProCite 5 → ProCite
  - 2.b Create a new ProCite database: File → New → ProCite Database. In the File name: dialog box, type 'procite workshop'. Save the file in the directory C:/Program Files/ProCite 5/Database. When the File Properties dialog box appears, select OK.
  - 2.c Search PubMed to find the electronic MEDLINE records associated with the hard copy reports included in Attachment 3: Tools → PubMed search. For detailed instructions on searching PubMed and importing identified records into ProCite, please see pages 57-62 from Chapter 2: Using ProCite: A Guided Tour (Attachment 4). [Note that you will modify Step 1 pg 58 from 'Select Internet Search' to 'Select PubMed Search'; skip Step 2; and modify Step 3 to search for the distributed articles by author, title, source and publication date. To improve specificity and retrieve fewer articles, it is helpful to enter uncommon search terms in the ProCite dialogue boxes (eg, enter uncommon author name in the author dialog box or an uncommon word from the title in the title dialog box).]
  - 2.d The downloaded records are currently stored in a temporary ProCite database and it is necessary to transfer them to a permanent database. Mark relevant retrieved records by clicking the box to the left of the relevant record and then transfer all marked records to the permanent 'procite workshop' database, using either drag and drop, the copy icon, or Database → Copy Marked Records.
  - 2.e Add the handsearcher's study design classification to Field 39 for all MEDLINE downloaded records that you have transferred to the 'procite workshop' database.

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- 2.g Delete all records for which the handsearcher's study design classification code (RCT or CCT) in Field 39 agrees with the MEDLINE Publication Type code (randomized-controlled-trial or controlled-clinical-trial) in Field 42. These records are already tagged correctly on MEDLINE and published on CENTRAL.
3. Follow steps 3a-3c below to prepare non-MEDLINE records in the format required by the Guide. All of the reports in Attachment 3 that were not available on MEDLINE will now be hand entered into the 'procite workshop' database. For guidelines and specifications on hand entering data into ProCite fields, see Attachments 5 and 6 for non-MEDLINE journal article records and Attachment 7, Example 10 for stand-alone conference proceedings records.
  - 3.a Open the 'procite workshop' database if it is not already open.
  - 3.b Select Database → New record. In the workform drop-down box at the top left of the screen, check that the Journal Long Form workform is selected. Hand enter the conference proceeding reports published in journals and the non-MEDLINE journal article reports into the Journal Long Form workform.
  - 3.c Hand enter the records for stand-alone conference proceedings (ie, proceedings not published in journals) into the conference proceedings workform using ProCite Field 4 for the Paper/Section Title and Field 9 for the Proceedings Title
  - 3.d Add handsearcher's study design classification to Field 39 for all hand entered records.

As a final step, the records would be organized into database files for submission to CENTRAL. We will not be completing this step during the workshop. Instructions for this process are included in the Guide for Submission of Handsearch Results to CENTRAL, Section 3.9, Format of Submissions (available at: [www.cochrane.us](http://www.cochrane.us)).

You have now completed the workshop section on creating a ProCite database for submission to CENTRAL. For the final half-hour, Dymphna Hermans and Elizabeth Pienaar will present on exporting search results from a ProCite register (both reference-based and study-based) to a RevMan Review.