A simple method to merge duplicate Endnote Libraries together after screening as part of a systematic review

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STEP 1: Agree screening codes e.g. 
Code 0 = include for full text screening 
Code 1 = exclude at title and abstract 
Code d = any further duplicates found

STEP 2: Agree which custom field to use for reviewer 1 and reviewer 2
Custom 8 = reviewer 1 
Custom 7 = reviewer 2

STEP 3: Make two copies of the Endnote library for reviewer 1 and reviewer 2

STEP 4: Set up SMART groups in each Library

STEP 5: Both reviewers screen titles and abstracts

STEP 6: Copy reviewer 1’s library to a new library

STEP 7: Copy reviewer 2’s library to the same library

You will now have an Endnote library with two copies of each reference

STEP 8: Create a SMART group using an OR Boolean search

STEP 9: Find duplicates with the Endnote default

STEP 10: Move the duplicates to trash

STEP 11: Edit remaining references in duplicates group with 0 in Custom 7

STEP 12: Edit the SMART group with an AND Boolean search

STEP 13: Repeat STEPS 8-12 for all combinations

What your final merged Endnote Library will look like

ESMI YouTube channel with the above as a screencast