SCIE research briefings: guidance

social care
institute for excellence
scie

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Introduction

This document provides guidance on SCIE's research briefings.

Contents

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Section 1: Definition and outline process

1.1 Definition of a SCIE research briefing

A research briefing (RB) is a structured account of the research on a given topic in social care, based on a systematic search of the literature. Its purpose is to give an overview of the research evidence to people who provide and use social care services. Because we do not assess the quality of the research nor undertake a systematic synthesis, a research briefing acts as a signpost for further reading, rather than as a definitive account of 'what works'.

A RB is a *critical* account of research reports published on a topic. This means that key concepts and issues are subject to critical analysis, showing for example their origins, debates about definition, and about the relevant statistics, and demonstrating the application of SCIE's value base. The boxed text below gives several examples.

> **A briefing on older people and medication will need to examine the concept of 'compliance'. A critical perspective, drawing on social science perspectives and on a framework of participation and control, will explore how older people (just like everyone else) want to control their intake of medication, rather than simply follow medical advice.**
>
> **A review of 'young carers' will need to critique the term in the context of the social model of disability: this may recast the issue as a shortfall in the services available to disabled parents and the impact on children and young people.**
>
> **Statistics should also be subject to critical analysis. For example, the literature on falls among older people shows that some falls are not reported if older people feel it was their own fault or if they fear professionals will suggest it is time to give up their home. Studies of the 'falls' not reported as such will have different implications for services.**
>
> **Policy terms may also need to be approached from a critical perspective. For example, the concept of co-production has a 30 year history and yet is sometimes portrayed as a 'new' development in social policy. In this context it is reasonable to ask why the concept has achieved political currency.**

RBs should incorporate attention to the perspectives of people who use services and their carers. For example, a briefing on services to people with mental health problems might question how far the outcomes measured are those that matter to mental health service users. The briefing may also consider how far services allow people to maintain control and independence, or how far the processes of assistance respect the recipient's dignity.

RBs should reflect SCIE's core concern with equality and diversity. For example, research often achieves very poor response rates from members of minority ethnic groups and the question is then whether this is noted and whether the applicability of the findings to minority ethnic groups is appropriately qualified. Central concepts may also need to be questioned: for example, does 'the family' mean the same thing in minority as in majority ethnic groups?

1.2 Structure and length

While there is no specific length requirement for a RB, it should treat the topic in some depth and should reflect the range and complexity of the issue. The body text of a RB may thus be between 7-10,000 words, equivalent to a substantial refereed journal article. In addition, a RB ends with material on links to other organisations, related SCIE resources and the references, making the overall page length up to 28 A4 pages.

The structure for a RB should include:

Section	% of body text
Key messages	5% or max 500 words
Introduction - what is the issue? - why is it important?	10%
What does the research show? - use frequent subheadings to break the text into logical sections and short paragraphs to create readable chunks - give attention to the views of people who use services and their carers - give attention to equality and diversity - integrate different types of research-based knowledge - identify reviews and/or high quality research - use examples in boxed text	75%
Implications from the research - for organisations, the policy community, practitioners, people who use services and their carers	10%
Links to resources - this includes other organisations working on the issues	
Related SCIE resources - this will be completed by the publications team, but following your suggestions	
References	

Authors should bear these guidelines in mind, but should not treat them as a straitjacket: if there are reasons to vary the structure or length, these should be discussed with the relevant manager and the publications team.

1.3 Project start-up process

The research briefing production process follows SCIE project management processes, which includes essential planning of staff resources and capacity. Further advice is available from the Programme Support Manager.

The first stage is to plan a scope to help write the project business case.
A scope underpins the business case which steers the Project Initiation Meeting by informing topic coverage and assisting decisions on the title, timetable and feasibility. SCIE scoping is a broad but systematic approach to gathering a wide range of background information on a topic. The time input depends on the nature of specific projects but for a research briefing is typically 30-60 hours' information specialist time. See section 2.1 for a flow chart of procedure and document use.

The recommended timetable for this stage is based on the availability of the Project Information Team. The scope may need to be booked at least one month before. Before starting the scope, the Project Manager / Research Analyst and Project Information Officer meet to discuss broad topic and complete the scope proforma.

The scope output is presented as a summary report, an EndNote library of research references, and a Mindmap of organisations and weblinks.

The next stage is to compile an outline of key dates in the production cycle.
The following staff resources should be considered and the relevant team managers consulted at the earliest opportunity, to maximise efficient use of staff capacity and enable the final product to be delivered on time.
- Head of Quality and Research
- Project Information Team
- Research analyst input
- Communications and Web teams
- External colleagues for writing, expert suggestion of sources, and for Quality Assurance purposes
- Administrative support

There should be communication between SCIE programme boards on demand for research briefings as some of the key staff would not be able to cover production of more than one briefing simultaneously.

These activities must be completed satisfactorily for the business plan to be signed off and for the project to proceed. The budget for commissioning an external research colleague to draft the briefing (see below) is in the order of £3000 (in 2009). The bid to the Programme Board should include this, plus funds to produce, launch and disseminate the briefing (another c. £8000).

The completed business case is presented to the relevant Programme Board for sign off, where the proposal and specific title for an RB should be approved. After approval, the Project Initiation meeting can be scheduled.

1.4 Project Initiation meeting

Before the meeting, the business case should be circulated, including scope results to give topic context.

Staff required:
Project manager / Research analyst
Member of Project Information Team
Representatives of Communications and Web teams (in order to plan coherently for the entire production cycle)

(optional)
Programme Support Manager
Head of Quality and Research

Agenda topics should include:
- Context
- Scope results
- Draft timetable (including alerting the Information Services team of likely timing of full text retrieval stage)
- Initial discussion on search terms and boundaries of the RB coverage
- Identifying an external research colleague* for writing the briefing (if relevant) and discussion on arrangements for bibliographic services to the commissionee (to inform copyright compliance).
- Marketing and dissemination planning

(The project initiation document template is a useful prompt for this meeting's agenda)

The outputs are:
- Completed project initiation document
- Detailed timeline

*Note: The engagement of an external research colleague to contribute to the planning and write the research briefing is an optional, but usually a necessary, part of the process: SCIE often lacks specific expertise or the time to handle the topic in depth and RBs provide a good opportunity to build bridges with the external R&D community. The external research colleague should bring additional subject expertise and may suggest material for retrieval and inclusion in the briefing. However, SCIE owns the RB and it will be a requirement that the RB is co-authored. Consult with your colleagues and with the Head of Quality and Research to identify people. Ideally the external researcher should

inform the information processes (suggesting search terms, key items, search sources, exclusion criteria, etc).

1.5 Searching and information processing
While the stages of searching, screening records for relevance, full text retrieval and record management are largely handled by the Project Information Team, collaborative input from the Project Manager is essential throughout.

Timetable
As a guide to time required at this stage, the minimum is:
    3 weeks' searching and screening
    3 weeks' retrieval with a further 2 weeks' cutoff for ordered items to be delivered

Search terms and sources
The scope results and the Project Manager's knowledge inform discussion with the Project Information Officer on:
- suggested search terms,
- appropriate limits for publication dates
- research sources e.g. bibliographic databases
- key authors
- key documents for reference harvesting
- Draft inclusion / exclusion criteria for relevant material.

Suggestions from the external research colleague are also useful.

Further search terms will emerge as searching proceeds and a coherent search strategy is developed.

Searching bibliographic databases of published literature generally makes up the major part of literature gathering. The bibliographic databases are selected from the recommended list for SCIE systematic reviews. It may be decided to limit the number of databases searched, informed by scoping and by prior knowledge of those likely to be most relevant, since searching cannot be as exhaustive for a RB as it would be for a systematic review.

Screening
The use of explicit inclusion/exclusion criteria shows the boundaries of the research briefing. The Project Manager and Project Information Officer work together to draft inclusion / exclusion criteria, which are piloted on a random 10% of the references.

The inclusion / exclusion criteria should focus on the topic, its theoretical framework and other basic criteria (such as date range, country or population), rather than on the methods or other research criteria. All types of research may be included as long as they bear centrally on the topic and its underlying theoretical framework and meet basic criteria.

SCIE is committed to drawing on knowledge from the following types of source:
- Organisations
- Practitioners
- The policy community, that is, knowledge gained from the wider policy context
- Research, gathered systematically with a planned design
- Service users and carers.

(See SCIE Knowledge Review 03: Types and quality of knowledge in social care (2003) www.scie.org.uk/publications/knowledgereviews/kr03.asp)

The topic focus and theoretical framework should be drawn as narrowly as possible without losing relevance to related concerns. For example, a topic on carers as a whole would be too broad for the RB format and would need to be narrowed down to focus on – for example – populations of carers (young carers, minority carers), or interventions to assist carers (breaks, counselling).

The key is to use the focus of the research topic and the underlying theoretical framework to guide decisions affecting the number of records which form the basis of the briefing. As a guide, 50-100 records are considered to be an appropriate maximum number of records for the writer to synthesise (although there may be circumstances in which this might vary). As screening proceeds, the criteria are likely to be more closely defined, and the Project Manager should ensure that all parties to the RB, and in particular all those engaged in screening, are aware of these refinements. If the restriction of topic, publication date or other criteria is not sufficient to reduce the number of records to a manageable level, the Project Manager may seek the advice of the Head of Quality and Research and the Project Information Team Manager to consider other restrictions.

Retrieval of full text records
After screening on titles and abstract, the articles assessed as relevant for inclusion and any outstanding queries will be retrieved in full text hard copy to allow further screening and to aid the writing process.

The nature of the commissionee's access to full text affects full text ordering route and costs. The main decision to be made is between using single, paper copies of articles (no further copies can be made, suits in-house analyst or arrangements where papers can be readily shared) or paying for copyright clearance (multiple copies can be made for this project, but costs nearly double).

EndNote is used to manage the retrieval source and hard copy status of the records, and to manage loans. EndNote may also be used by authors to record their notes or keywords, using the Notes, or Research Notes fields.

Record management
An EndNote database is compiled for the purpose of managing record loans. If copyright clearance has been obtained, a second copy can be made to send to the external research colleague who is writing the briefing.

1.6 Commissioning brief for the writing stage

The project manager will write a commissioning brief to engage an external research colleague, in order to define the allocation of roles, workload, authorship and timetables. As SCIE is paying for external expertise, the brief would normally be based on the external colleague undertaking the majority of the research synthesis and writing a first draft. External expert input at the searching and screening stages is also valuable.

At the earliest opportunity, arrangements should be made with the external research colleague for access to the full text records. This must happen before full text records are ordered, as different ordering processes and costs are required depending on whether the staff are internal or external to SCIE. If copyright clearance has been arranged and paid for at time of ordering full text items, a second copy can be sent to the commissionee while maintaining a master library at SCIE.

The final draft research briefing is co-authored, including the Project Manager, the external research colleague and the Project Information Officer.

Guidance on the format for the draft can be found above at section 1.2.

1.7 Quality assurance of draft Research Briefing

The project manager is responsible for editing and checking the material produced by the external research colleague to ensure it complies with SCIE's standards. The draft RB will be subject to internal (by the Head of Quality and Research) and external QA.

The format and timescale of RBs does not permit the use of full quality appraisal tools. Because a RB describes a range of relevant research, multiple tools would be required and there is the risk of excluding relevant material because of methodological flaws.

As section 1.1 describes, however, authors should adopt a critical perspective, and the account should pay attention to whether the evidence base addresses the views of people who use services and of their carers, and to equality and diversity. The assessment of material is therefore underpinned by these critical perspectives, and will focus primarily on topic relevance rather than research methodology.

However, there are occasions when the material is so misleading that its unqualified inclusion would undermine the purpose of a RB to alert the reader to relevant evidence. For example, studies describing the views of 'families' may not attempt at all to distinguish which family member's views are reported. Since it may contain some relevant material, such work should be included with qualification.

In addition, there may be material that is so poor that its legitimacy as relevant research is questionable. For example, a study which claims to report the views of children and young people may not contain any data obtained directly from them. If the research is

about the views of children and young people, such a study should be excluded as fatally flawed.

1.8 Submission to Communications Team

The RB should then be passed to the Communications team for publication, requesting a 'light' edit (i.e. for house style). This is to ensure that SCIE's standards for written text are met while avoiding in-depth editing that risks changing the sense. The Project Manager should review the editorial comments and keep the Web team informed of progress.

Section 2: Detailed procedure for Project Information Team

2.1 Flow chart of scope process within the PIT

Receive email from SCIE project manager
notifying requirement for scope

⇩

Send scope pro-forma to project manager and
make 1-hour appointment to discuss pro-
forma

⇩

Conduct structured reference interview with
project manager based on pro-forma.
Negotiate scope scheduling and arrange mid-
scope and end of scope meetings

⇩

Follow checklist to guide procedure

Consult
colleagues and
experts - may
include online
lists

⇩   ⇩   ⇩

Conduct bibliographic searching and record
in Excel search output file. Save database
output files in Search Output folder

Search and browse for relevant weblinks for
organisations, projects, initiatives, resources

⇩   ⇩

Organise and keyword bibliographic output
in EndNote

Organise weblinks on Mindmap template

⇩   ⇩

Generate Word output of keyworded
EndNote bibliographies (using template)

Generate Word output of organised weblinks
from Mindmap (using template)

⇩   ⇩

Write scope summary using template

⇩

Final output: Summary, EndNote library and
bibliography, Mindmap and Word output.
Excel file of search terms can be sent if
required.

2.2 Example of scope summary

Nutrition and hydration in social care
Date scope completed: started 25 March 2008
Janet Clapton, Information Officer

Brief
Find recent tools and guidelines on nutrition and hydration which have relevance for social care.

Summary of finding
There is much recent guidance on nutrition, less so on hydration but that which exists is still recent.
Sub-topics are emerging as follows:
- Nutrition and hydration guidance in the most general sense
- Economics, including domestic food budgets
- Activities:
  - Screening and assessment
  - Eating support
  - Mealtime organisation
  - Education and training: of service users, carers and staff
- Helping specific groups (which overlap significantly)
  - Residential care
  - Older people
  - People with dementia
  - Those who have swallowing problems
  - People with learning disabilities
  - Homeless people
  - Dental care recommendations in connection with eating

Sources of material
The Department of Health Nutrition Action Plan was the most important source of organisations and literature.
Reference harvesting was the most important source of new references, and was carried out on all the reports listed in the Mindmap.

Challenges identifying material
A huge amount of research material exists into problems of nutrition and dehydration. There seems to be a large literature on interventions, but guidelines and good practice examples were harder to find by searching. However, an extensive collection of recent tools and guidance was gathered.

Layout of scoping results
Mindmap and EndNote library (59 references) coded according to:
- Assessment

- Community care
- Dementia
- Dental health
- Economics
- Education
- General
- Homeless people
- Hospital care
- Key document
- Learning disabilities
- PEG feeding
- Residential care

Extent of scoping

11 hours have been spent on this scope so far; duplicates are turning up very frequently which suggests the most significant guidelines have been captured.

Potential for further work

Some reports e.g. those from the Caroline Walker Trust have extensive research reference lists, should this type of information be required.

Contacts with the key organisations participating in the Nutrition Action Plan summit should be productive.

Key documents

The key source document is:

Department of Health Nutrition Summit Stakeholder Group (2007). Improving nutritional care: a joint action plan from the Department of Health and Nutrition Summit Stakeholders, Department of Health.
http://www.dh.gov.uk/prod_consum_dh/idcplg?IdcService=GET_FILE&dID=152713&Rendition=Web

The Nutrition Action Plan outlines how nutritional care and hydration can be improved and suggests five key priority areas through which managers and staff working in health and social care can address this.

2.3 Discussion on search terms and timetable

The Project Information Officer work breakdown (based on pilot study) is:
- Searching 30 hours
- Data cleaning and deduping (removing duplicates) 15 hours
- Screening 10 hours (plus further full text screening – 10 hours)
- Full text retrieval 10 hours (plus processing of orders – 5 hours)
- Hardcopy administration and assisting commissionee: 5 hours

Searching process

The recommended databases for searching are drawn from the SCIE systematic review database list and the SCIE approach to economic evaluations:

AgeInfo
Applied Social Sciences Index and Abstracts (ASSIA)
British Education Index
C2-SPECTR
C2-RIPE (Register of Interventions and Policy Evaluations produced by the Campbell Collaboration)
ChildData
CINAHL
Cochrane Library (CDSR, CENTRAL)
Dissertation Abstracts
ECONLIT
EMBASE
Health Management Information Consortium Database (HMIC)
International Bibliography of the Social Sciences (IBSS)
Medline
NHS EED
PsycINFO
Social Care Online (SCO)
Social Sciences Citation Index
Social Services Abstracts
Social Work Abstracts
ZETOC

The SCIE approach to economic evaluation of interventions is due to be published shortly (June 2009); there will be searching implications from this approach and training guidance will also be available soon.

The source for access to electronic resources is the SCIE online resources file including SCIE listing of e-journals subscriptions, held on SCIEnet at:
http://scienet1/sites/knowledgemanagement/online_resources/default.aspx

To develop search strings, controlled language tools and known relevant documents are explored to discover relevant search terms, and subject experts may be consulted in addition. The search strings need to take account of the inclusion / exclusion criteria. The search strings need to be piloted on selected databases (e.g. one large health database such as Medline, one social care database such as Social Care Online and one subject specific database such as AgeInfo) and the relevance of the records checked. The search strings can then be revised if necessary, and are developed iteratively for each database.

After trying a search string on each database, the results' topic coverage needs to be assessed before repeating the search with additional terms. The search strategy will need to be adapted for each database depending on its coverage, structure, utilities and the controlled language tools available. All searching will be carried out by the information officer but results will need to be discussed with the project team and altered accordingly.

Journal searching will generally require short search strings. This is because the available content on a specific issue is likely to be limited, and journal searching interfaces do not offer the capacity to conduct complex searches.

The search output is imported to and managed in EndNote. No filtering out is done at this stage. All search output figures and strategies used should be recorded in the relevant templates. When searching is complete the results are deduplicated in EndNote (using the deduplication function and manual inspection) and the data is cleaned; these processes are iterative.

Recording the search

The aim of recording the search is to make it possible to rerun the search.
The search details should be saved in Excel (working document) and Word (final presentation)

As a minimum, the following data should be recorded
- Database name, version and host
- Date search conducted
- Date limits set on records to search (e.g. 1999-2006) and rationale
- Language limits set on records to search and rationale, or note if no language limit available
- Exact search terms used for each database, and the combination of terms
- For journals, the journal title, volume, issue and dates of publication should be included

Excel
Example extract:

Co production research briefing	Name of searcher: Janet Clapton	Start: 10/06/08				
Database	Host	Database coverage dates	Date of search	Search limits	Search terms	Search output
AgeInfo	CPA	1975 onwards	11/06/2008	none	text = co-production	1
			10/07/2008	none	text = co-produce*	0
			10/07/2008	none	text = co-producing	0
			10/07/2008	none	text = timebank*	0
			10/07/2008	none	text = time bank	0
			10/07/2008	none	text = time bank*	2
ASSIA	CSA	1987 onwards	11/06/2007	none	freetext=co-production	29

Word
Ideally each search line should be on a new line, with care taken to make the connection between lines clear with Boolean operators (and, or, not)

Database name, version, host
Date search conducted
Date limits set on search
Language limit set on search
Notes

Screenshots of the search history should also be saved for all databases. This is because host interfaces can change at short notice and evidence should be presented in case of question as to how the database was searched originally. In such cases, a new search may need to be devised for the purpose of later review work.

An example of a search recording template is given below:

Applied Social Sciences Index and Abstracts (ASSIA)

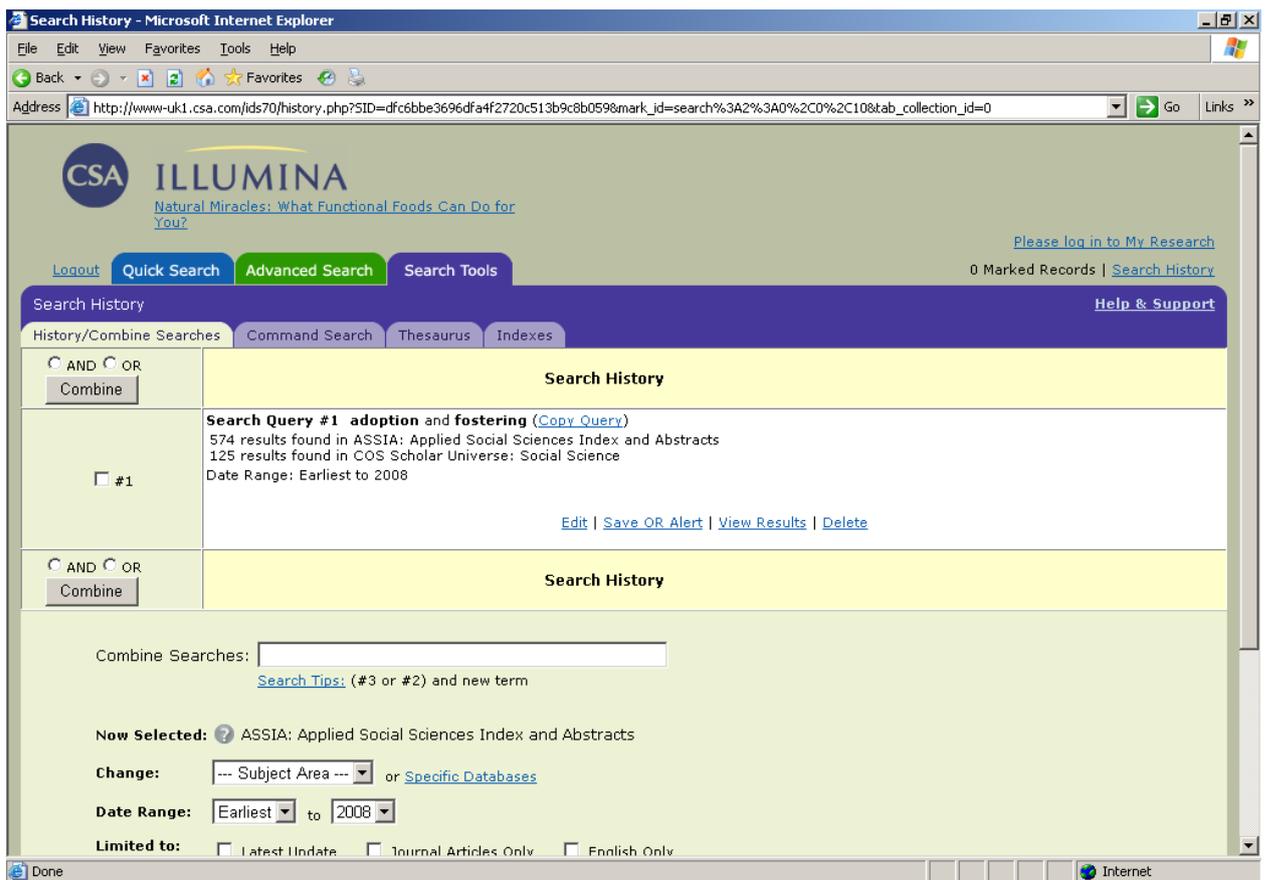| ASSIA, CSA Illumina |
| --- |
| Date search conducted |
| Date limits set on search |
| Language limit set on search |
| Notes |

e.g.
1 ((**approved social worker**) or (**approved mental health professional**)) and (**compulsory treatment**)
#2 schizo*
#1 or #2

ASSIA screenshot example

EndNote use

EndNote is convenient for handling and organising the search output, data collection, retrieval and hard copy management. Records downloaded into Endnote will consist of bibliographic details and sometimes abstracts, which will then be screened against inclusion/exclusion criteria.

Data to collect:
- Total search output, including duplicates
- Number of duplicates found at each stage (at start, screening on titles and abstracts, and full text screening)
- number of items found in searches
- number of items found by other means (personal contact, stakeholder input, handsearching, citation tracking)
- inclusion/exclusion of items:
  - number excluded on preliminary screening, and reasons
  - number parked for potential later work
  - number of full-text items retrieved
  - number excluded on full-text screening, and reasons
  - number to be considered for inclusion in research briefing
- number of useful citations retrieved from each database against total number of hits.

The search output from most databases can be imported directly to EndNote, and remaining search results are typed in. It is easiest to have several EndNote libraries, one for each stage, and a carefully maintained Excel sheet of literature flow at each stage. It is important to cross-check record number totals for each category; the publication stage is embarrassingly late to find discrepancies.

De-duplication can be started via the automatic duplicate finder in EndNote, followed by a manual check, but further duplicates may be identified at the screening stage.

These are recorded in the Excel sheet described above, e.g.

	date	
Number of records to start with	13/11/2006	3830
Number of duplicates automatic removal	06/09/2006	895
Number of duplicates after additional manual removal	13/11/2006	**1144**
Total number of duplicates	13/11/2006	2039
Number of records going through to screening	13/11/2006	2696
Number of duplicates removed before screening	19/01/2007	**1134**
Number of unique records	19/01/2007	1791

Data cleaning is most practical once the volume of records has been reduced by deduping – as a minimum, the record data should be in the correct fields and the author names should be correctly formatted. Cleaned data will make further deduping possible.

2.4 Screening and retrieval

The detailed guidance in this section consists of:
- Screening, with inclusion / exclusion criteria example, against titles and abstracts (where available);
- Retrieval procedure to acquire full text of articles, including Konduct instructions for requesting interlibrary loans;
- Copyright.

Screening

The main stage of screening is carried out in EndNote, using agreed keywords for the relevant inclusion / exclusion criteria, applied in the Keyword field, e.g. Exclude scope. The largest proportion of search result records are excluded at this stage. It is necessary to reflect on questions about the inclusion / exclusion criteria, record decisions and guidance, and amend the criteria if necessary.

The EndNote library is the main data repository software available to the staff writing the RB.

Example of inclusion / exclusion criteria: Co-production

Inclusion / exclusion criteria		Guidance	Comments and queries
1	**EXCLUDE: Scope**: not social care	Not about social care. Or about policing, transport or town planning. Or behavioural or mass control interventions: e.g. smoking cessation, obesity. Only include social welfare and timebanks if evaluated. Include tenants' associations.	Include general theoretical pieces about public services if published in peer reviewed journals. A lot of systems level pieces. Exclude health but include mental health, exclude policy, and exclude citizen participation
2	**EXCLUDE: Age:** not adults	i.e. exclude children's services	Exclude family services
3	**EXCLUDE: Co-production** not	Not about co-production as in	Exclude if abstracts read as if

	meaning involvement	valuing users of services as equal partners	the 'co-production' is tokenistic / superficial
4	**EXCLUDE: Location** not developed countries	Setting is developing countries	To monitor
5	**EXCLUDE: Date** of publication before 1990	Published before 1990	To monitor
6	**EXCLUDE: Publication type**	Published in books newspapers, trade journals such as Community Care	To include conference proceedings
7	**EXCLUDE: insufficient details** to identify reference or no abstract to screen		
8	QUERY	Not sure	
9	INCLUDE	Not excluded by above	

Retrieval procedure

Overview of procedure:
1. Establish whether copyright clearance is required for this Research briefing
2. Source the article
3. Record article source in the Label field in EndNote
    a. If copyright clearance is required, check the copyright fee at the British Library and append it to the Label field
4. Print or order the article using Konduct / ILL via librarian (Chris Streets)
5. Record the retrieval status in the Call number field in EndNote
6. Update the retrieval status as required
7. Check EndNote for outstanding work

"Quick wins"
1. Order by journal source for more efficient retrieval
2. Search for references that contain "http:" or "www." these are usually available online

Additional notes before starting retrieval
- Tidy references at earliest opportunity – i.e. author names in correct format, editing journal titles so the same title is uniform – change & to and, spell out words in full.

Resource list
In EndNote, clicking on Edit Preferences / Library display to give the display
Author   Title   Keywords   Label   Call number
then clicking on the column heading will make it easy to sort and see the status of records at a glance.

a. Keywords for retrieval

PLEASE DO NOT ALTER OR ADD TO THESE KEYWORDS WITHOUT GROUP AGREEMENT.
Retrieval source terms: Use Label field
Assumes no copyright clearance required. Options if copyright clearance is required are in **bold type**

Online
SCIE e-journals
UWE e-journals
UWE ILL
EBSCO Host
British Library
SUNCAT
Check
Not found

Retrieval status terms: Use Call number field

Not sourced
Sourced
Ordered
Retrieved

b. Article retrieval sources
Source the article by working down the following list and record its status. A front sheet is showing bibliographic details is printed and enclosed for every record. Use EndNote output Author Date Large and paste into a Word document to do this.

General note when retrieving:
If the original item had no abstract but you find one in the above sources, copy and paste it into the Abstract field in EndNote.
Pubmed is a useful source of abstracts: http://www.ncbi.nlm.nih.gov/entrez/query.fcgi

Full text in electronic record
Print the record
Source: **Online**
Retrieval Status: **Retrieved**

Google
Search Google using the exact title (in "quotation marks").
A check in Google is useful for reports or unclear journal titles (e.g. unfamiliar abbreviations) or open access e-journals which have no print version.
Source: **Online**
Retrieval Status: **Retrieved**

Large online reports (i.e. more than 30 sides) do not need to be printed but instead show the URL on the printed front sheet.

SCIE electronic journals list
- Click on the Excel sheet SCIE electronic journals and log in to the journal title given for the bibliographic record (NB – check years range on Excel sheet first).
- Search for the article and download full text (if available).
- Print the full text article.
- Place the article printout in the Full text indexed box.
  Source: **SCIE e-journals**
  Retrieval Status: **Retrieved**

If the article is not in the SCIE electronic journals list or the item is a book or report, proceed to checking Google.

UWE catalogue – OMIT THIS STAGE IF COPYRIGHT CLEARANCE REQUIRED
Found at: http://www.uwe.ac.uk/library/catalogue/
Click on Glenside and search for the relevant item.
Print / save / record the article as before
Source: **UWE e-journals**
Retrieval Status: **Retrieved**

If the item is in the UWE catalogue but only as a print copy / e-journal doesn't cover those years,
Source: **UWE ILL**
Retrieval Status: **Sourced**
[To make out a UWE Interlibrary loan request, see later – at that point, change Retrieval Status]

EBSCO Host - OMIT THIS STAGE IF COPYRIGHT CLEARANCE REQUIRED
Another option for finding articles:
http://ejournals.ebsco.com/login.asp?bCookiesEnabled=TRUE (or from SCIE information Resources list – use Athens login).
Print / save / record
Source: **EBSCO Host**
Retrieval Status: **Retrieved**

British Library interlibrary loan
If the item is not found using the above procedures, check the British Library catalogue
http://catalogue.bl.uk
To get to the journal search section:
- Click catalogue subset search
- Click serials and periodicals
Source: **British Library**
Retrieval Status: **Sourced**
Note the copyright fee at the end of the Source field, for entry in Konduct
[To make out a BL Interlibrary loan request, see later – at that point, change Retrieval Status]

Suncat catalogue - OMIT THIS STAGE IF COPYRIGHT CLEARANCE REQUIRED
Suncat searches institutions libraries for potential loan copies:
http://www.suncat.ac.uk/
Source: **SUNCAT** NB – few should be this option.
Retrieval Status: **Sourced**
[to make SUNCAT ILL requests, send a text file of the output to Chris).

Chris to check
If the reference is still not found copy and paste the reference into an email to Chris.streets@scie.org.uk.
Source: **Check**
Retrieval status: **Not sourced**

Not found from above sources
Source: **Not found**
Retrieval Status: **Not sourced**

Retrieving books and reports

The order to search for these items is: (GO STRAIGHT TO BRITISH LIBRARY IF COPYRIGHT CLEARANCE REQUIRED)
- UWE catalogue
- Google
- **British Library**
- SUNCAT

UWE catalogue
Use Detailed search (R hand box) to locate items.

Google
May be useful for leaflets and reports

British Library
Refer to Information Services Team.

SUNCAT
Use the Author/Title search

Order these items via Konduct and Chris Streets as for articles.

Making Interlibrary loans
First a sort and export needs to be done on EndNote according to Source (**UWE ILL/ British Library/SUNCAT**) and Retrieval Status (**Sourced**)

You'll process all the records for UWE ILL's in EndNote and Konduct completely before going back to another source.

Copy the search results (Ctrl K) into a Word document, using an export format which does not include abstracts (e.g. SCIE style, Author Date)

Cut and paste the file details into the Konduct records (see below).
When finished, alter the retrieval status for this batch in EndNote to **Ordered**

Use the Konduct data entry stage as Quality Control – do you remember a particular journal as being available free? Could we obtain this Interlibrary loan from a cheaper source?

BL ILL's are processed in the same way.
SUNCAT ILL's are saved as a text file which is then emailed to Christopher Streets
christopher.streets@scie.org.uk
These requests then have their retrieval status changed to **Ordered**

Konduct instructions

Konduct is an Access-based programme used for library stock management.
Here, we are using it to automate the inter library loan requests.

Use the drop-down menus in the toolbar to go to Loans – Interlibrary Loans – Request by Status
This brings up the table of all requests on the database. Our batch will be distinguished by having the status **New**

Booking in new requests
Click Loans – Interlibrary Loans – New Request
(see screen shot)

Enter the following data, tabbing to move between fields.
- Lending library – type or use drop-down list

- **+** press for automatically incremented request number
- Select your user/requester name and librarian from drop down menus (can type in first 3 letters).
- Request method – email (default?)
- Request type – defaults to PHOTO but must be selected for the request to be charged at the correct rate (alternative is LOAN for books or reports – please ask Janet or Chris)

  Entering the bibliographic information:
  - Title = Journal title
  - Author – first author only needed
  - Article – only the first 5 words are needed, as longer titles cannot be handled by some loaning libraries' systems.
  - Media = JOURNAL ARTICLE etc.
  - Press '**copyright form**' button at bottom of screen to open copyright form in a new window – print and close. Collect these up, check them and sign and date them for Chris' records. The form is not required for book records.
  - Press **New request** or **Close** (automatically saves record).

ILL's should be processed so that batches are around 30 records – this saves strain.

If not done already, on EndNote change the retrieval status for this batch to **Ordered**

Interlibrary loan hardcopies
Process and file as for full-text printouts.
Amend Retrieval Status to **Retrieved**

Maintaining the hard copy library

- Manage the paper copies by printing and enclosing a front sheet with the bibliographic details. Use EndNote output Author Date Large and paste into a Word document to do this.
- Put the record in a plastic sleeve with the open side of the sleeve INWARDS, and use index cards to organise the records.
- If additional copyright fee HAS NOT been paid at time of ordering article (cheaper) then the internal external research colleague will borrow the single copy of a record and return it when finished with. No additional copies can be made.
    - The interlibrary loan copyright declaration should be signed by the person who will be working on that record.
    - Registered providers cannot copy our records. A letter agreeing to conditions of loan should be signed before loan of records.
- Retrieval records should be carefully managed in EndNote, to avoid duplicate ordering of articles which would constitute copyright infringement.
- If additional copyright fee HAS been paid at time of ordering (more expensive but more flexible), additional copies can be made to supply to an external or multiple writers for the purpose of this project.
- The master library of articles should be labelled as SCIE property
- Databases with subscription abstracts cannot be made available outside SCIE. An alternative version of the database without abstracts is made publicly available.

See BL Document supply customer handbook p8
http://www.bl.uk/services/document/pdf_files/custhbk.pdf