I was never taught how to do this

Reference management

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10 October 2022

KU LEUVEN

IWNTH: **Reference management**

- 📚 Ref manager: why? which?
- 📥 Zotero: adding & citing refs
- 🗂️ Zotero: organizing
- 📦 Zotero: plugins
- 📝 Note-taking

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Building a bibliography

- One-time or continuous effort?
  - One-time: ZoteroBib, CiteThisForMe…
  - Continuous:
    - Mapping the field
    - Organizing it
    - Multiple publications…
    - ⇒ You need a reference manager

Reference manager: why?

- Citing → reference
- Remembering → list
- Reading + searching → PDF
- Organizing → tags…
- Annotating → highlighting, notes…
- Collaborating → groups…

Reference manager: which?

- **EndNote**: expensive, not superior
- **Mendeley**
  - + user friendly, integrated with Scopus…
  - − Elsevier
- zotero 👈
  - + open source
  - + powerful, extensible (plugins, styles)

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Zotero: adding publications

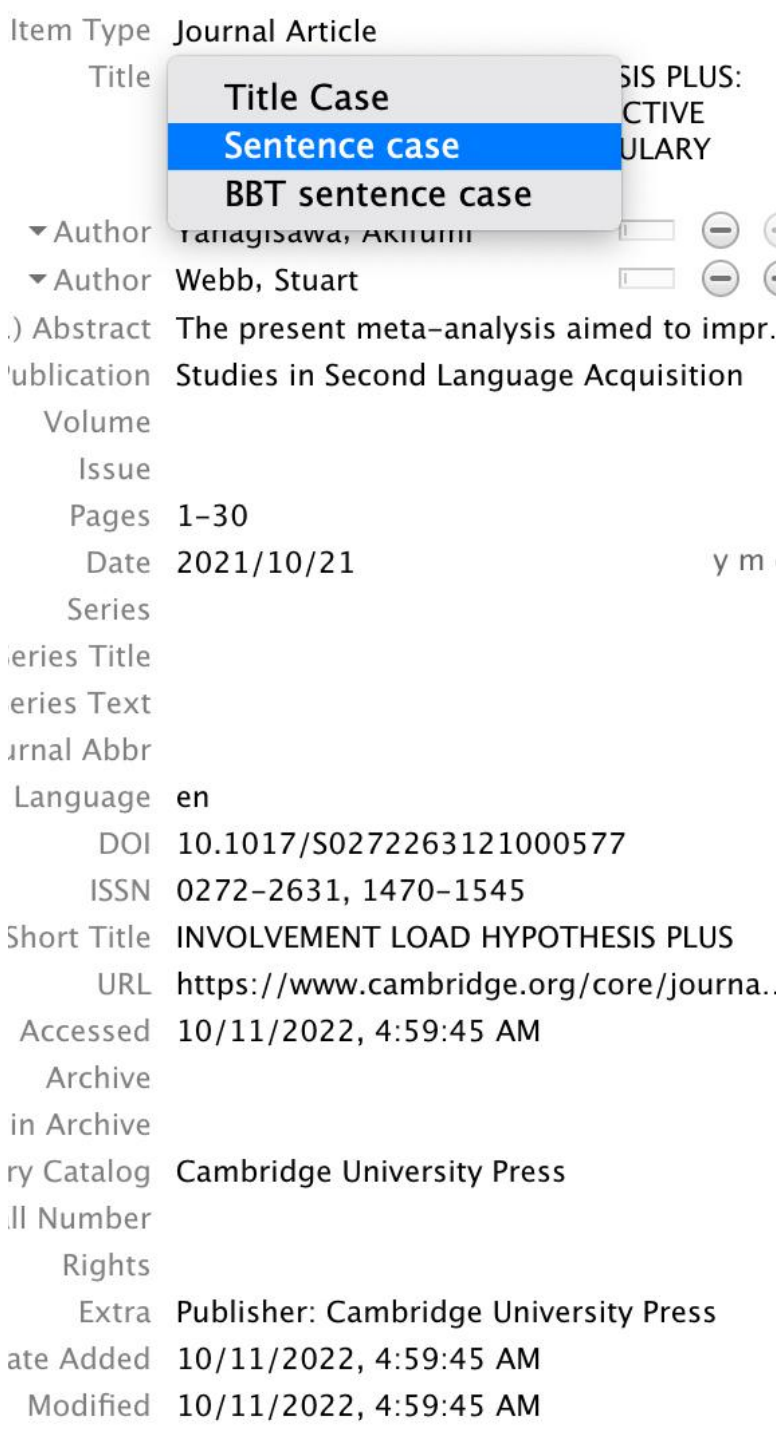
- **Most practical**: Zotero Connector from acad websites

- **Most reliable**: + DOI / ISBN
- **With PDFs**: drag-and-drop PDF (+ Retrieve Metadata for PDF if necessary)
- **Last resort**: Manual entry

Zotero: cleaning up imported refs

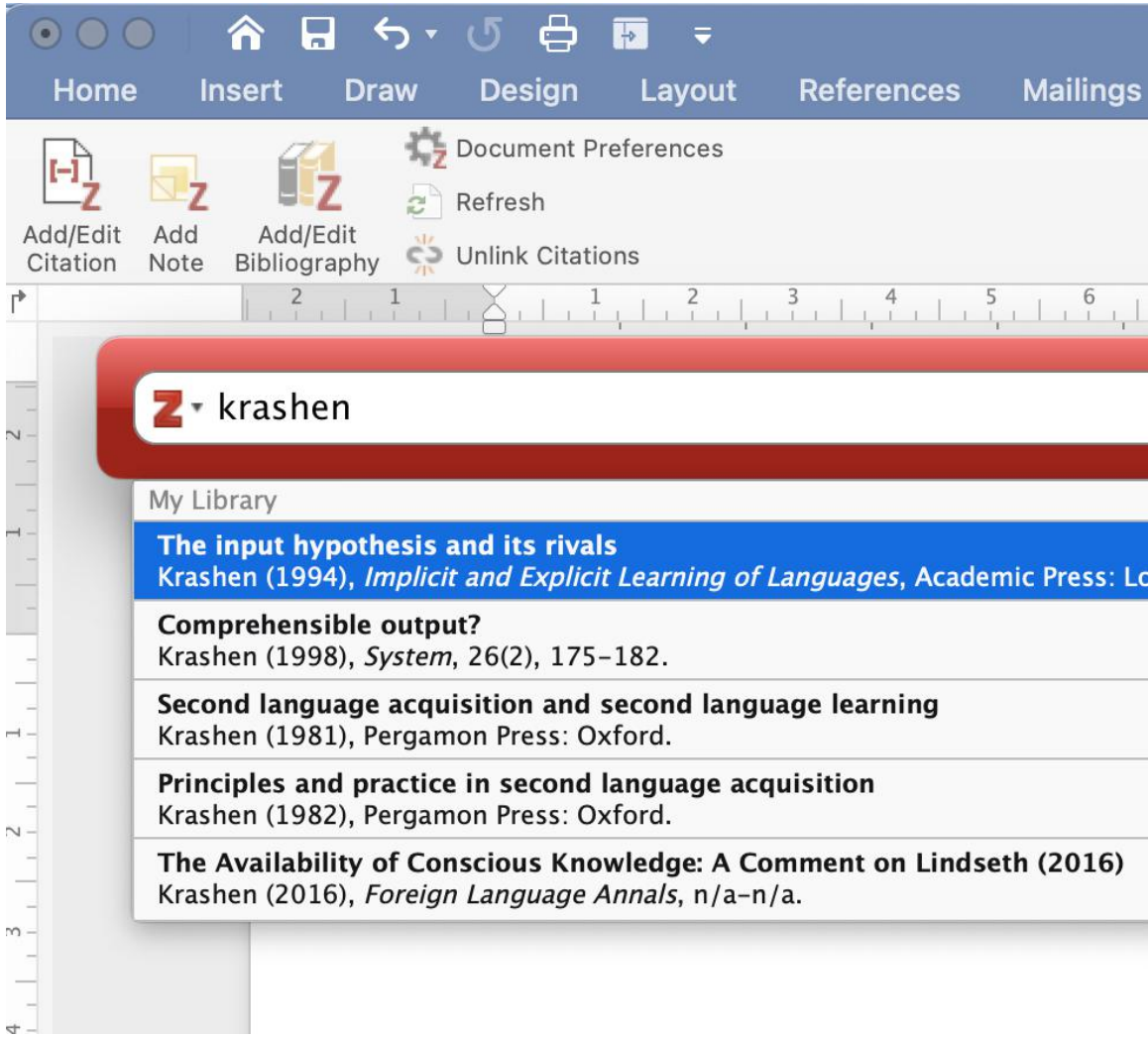
It might be necessary to:

- Change title case ⟶ right-click
- Fix names
  - particles (*de, van…*) in first names
  - problems with less standardized publishing websites
- Check volume, issue, pages, date, publisher



Zotero: citing

- Choose Citation Style
  - 10,352 styles available: journals…
  - check language (APA)
- Copy Citation (Ctrl/⌘⇧A)
- Copy/export Bibliography (Ctrl/⌘⇧C or Create Bibliography from Items…)
- In **Word**: Zotero add-in
  - Edit > Page number
  - Edit > Omit author
- In **LaTeX**: export with Better BibTeX



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Zotero: best practices

- Sort by “Date added” ⭐

Zotero: organizing

- **Tags** (⭐ powerful but ⚠️ time-consuming)
  - **topics**: YOUR keywords
  - **type**: *review/synthesis*, empirical study, dataset, position paper, tool/software…
  - **status**: to read, priority, to obtain, to fix…
  - **importance**: "**!!!**" (key/influential), "**!**" (excellent), "👎" (bad → delete?)
  - Assign color to most used
- **Collections/folders** (eventually)
  - group by publication/purpose
    - thesis/chapters/papers/talks
    - courses

Literature: prioritizing

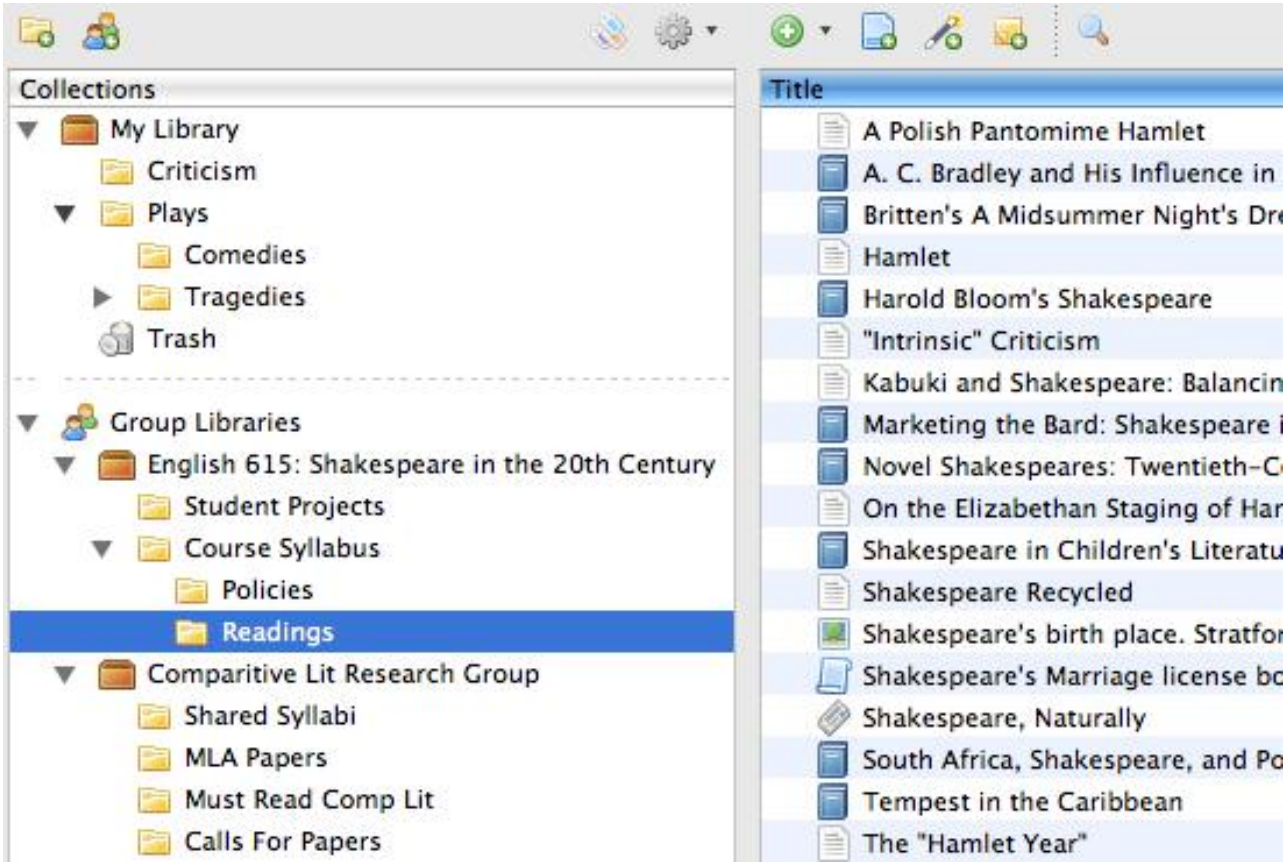
- All the literature is not equally important.
- Prioritize based on relevance + quality:
  - **A**: best quality + most relevant → read and re-read
  - **B**: high quality + relevant, but not essential
  - **C**: maybe interesting (ok quality, not clearly relevant) → keep for later
  - **D**: not relevant at all *or* low quality → throw away/do not spend time

(Hayton, 2018)

Zotero: collaborating

Create an account on Zotero.org (free)

- Cloud backup
- Sync across devices
- Create **Zotero Group** to collaborate with others (shared bibliography)
  - co-authoring/collective project
  - research group
  - course/seminar
  - public bibliography



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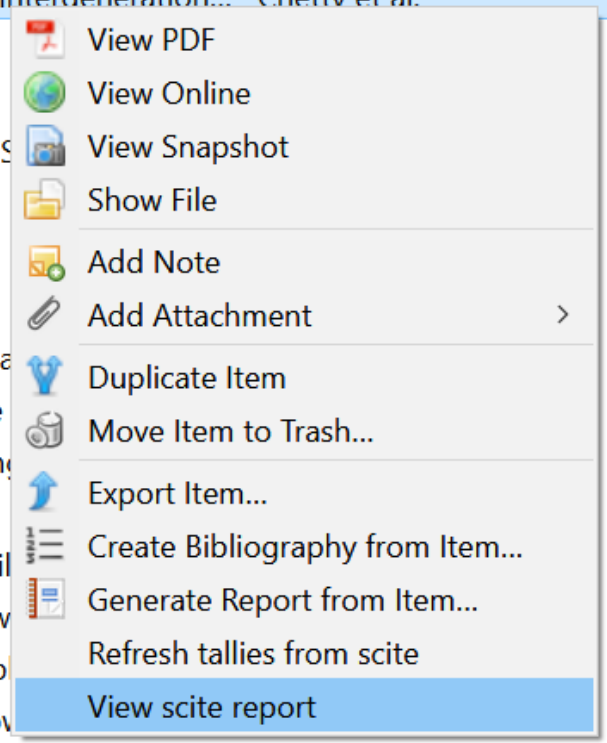
ZotFile 🔗

- File management
- Auto-renaming
- PDF files in a folder of your choosing
  - e.g., on OneDrive/Dropbox
  - outside Zotero cloud (metadata are synced but not PDFs → not reaching the 2GB limit)

Scite 🔗

- Citation Counts ⟶ quick & dirty indicator of importance/influence (normalize by year)

Title	Creator	Supporting	Disputing	Mentioning
Macroeconomic determinants of growth: Cross-country evidence	Kormendi and Meguire	24	8	442
Where is the land of Opportunity? The Geography of Intergenerational Mobility i...	Chetty et al.	30	6	709
Is the United States Still a Land of Opportunity? Recent Trends in Intergeneration...	Chetty et al.	6	4	139
The effects of mergers: an international comparison		15	3	201
The Intergenerational Transmission of Context		7	3	139
Association between Amygdala Hyperactivity to Harsh Faces and S		25	3	270
The Rise in Firm-Level Volatility: Causes and Consequences		15	3	67
When Is the Government Spending Multiplier Large?		17	3	229
Simple Analytics of the Government Expenditure Multiplier		20	2	305
The High Cost of Prescription Drugs in the United States: Origins a		0	2	129
Statistical tests, P values, confidence intervals, and power: a guide		5	2	517
Does Compulsory School Attendance Affect Schooling and Earning		38	2	990
Analyses of Intergenerational Mobility		0	1	47
Inequality of Opportunity, Income Inequality, and Economic Mobil		2	1	29
Analyses of Intergenerational Mobility: An Interdisciplinary Review		0	1	47
Evolutionarily stable strategies for a finite population and a variab		2	1	203
Entrepreneurship and the process of firms' entry, survival and grov		5	1	154
The skewness of scientific productivity	Ruiz-Castillo and Costas	5	1	24



Better Bib(La)TeX 🔗

- For integrating with LaTeX

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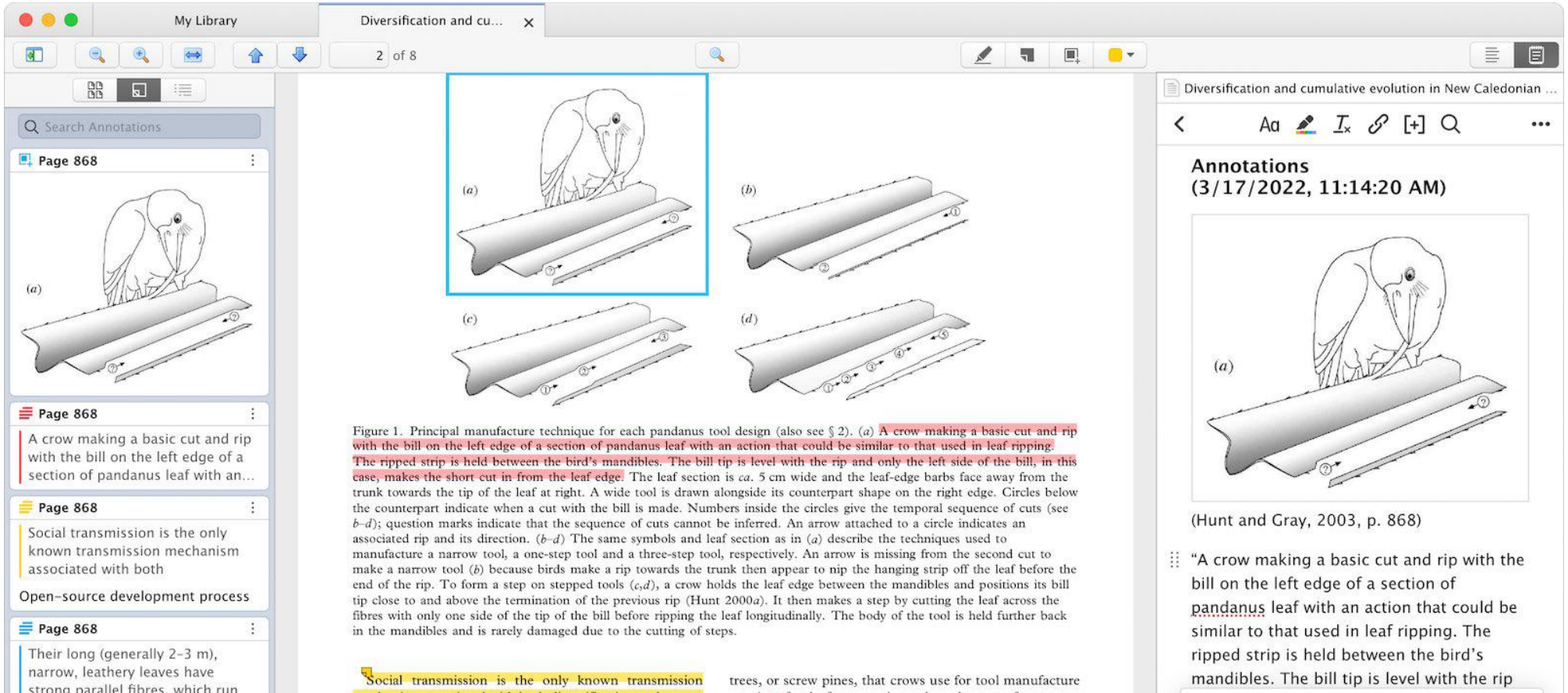
Note-taking and highlighting in Zotero

- New (Zotero 6.0)
- Very well done and promising integration within Zotero (full-text search, etc.)



Personal take: Take notes for writing

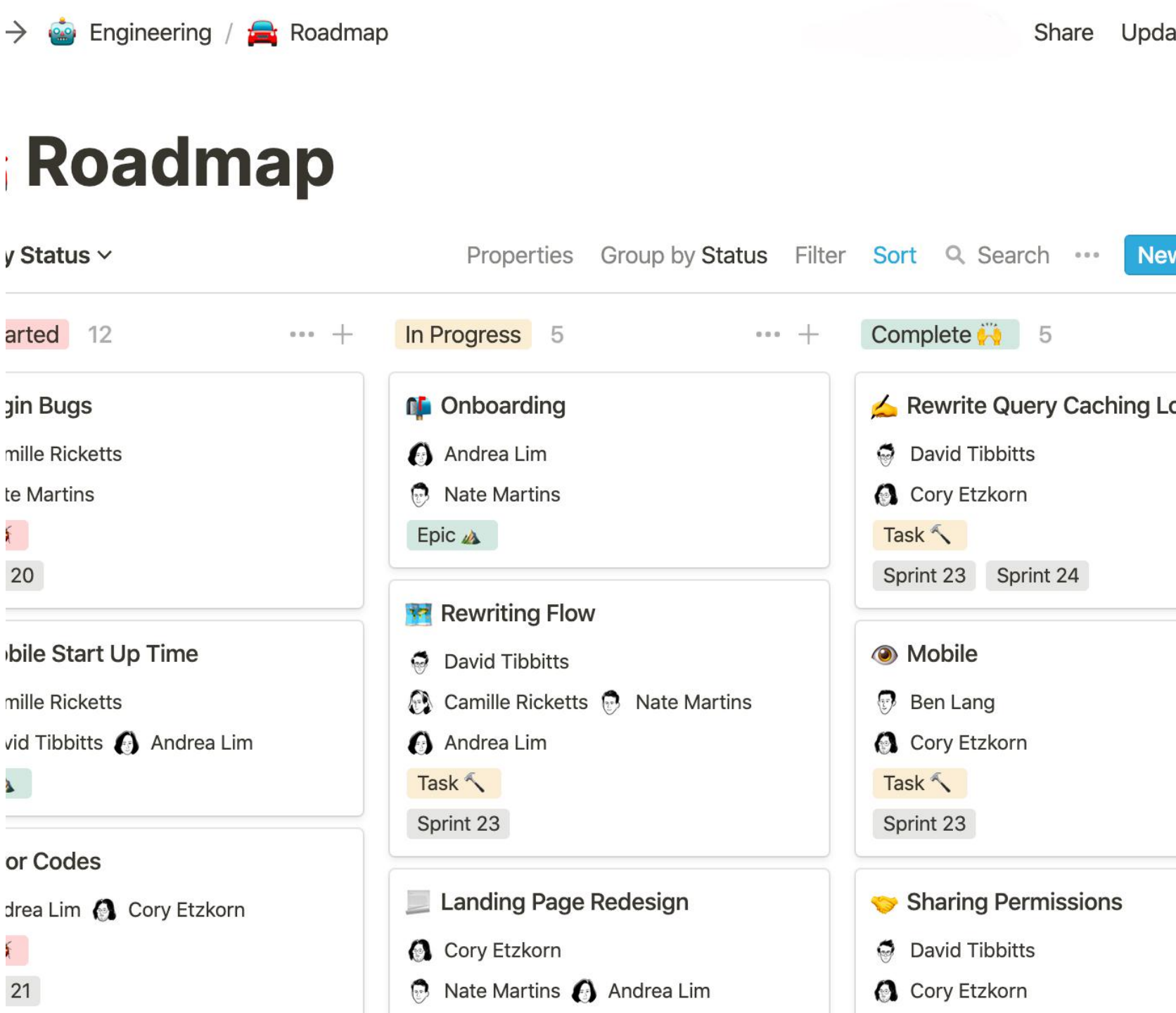
- Highlighting as you read ✓
- Outlining/Notes as you read: OK.
  - But probably very time-consuming and not always useful later.
- ⇒ Outline/take notes for a specific writing project (chapter/publication), not ‘just in case’.
- Avoid the ‘shiny new toy’ syndrome.
- Most important: keep everything in **one** place.

Types of note-taking software

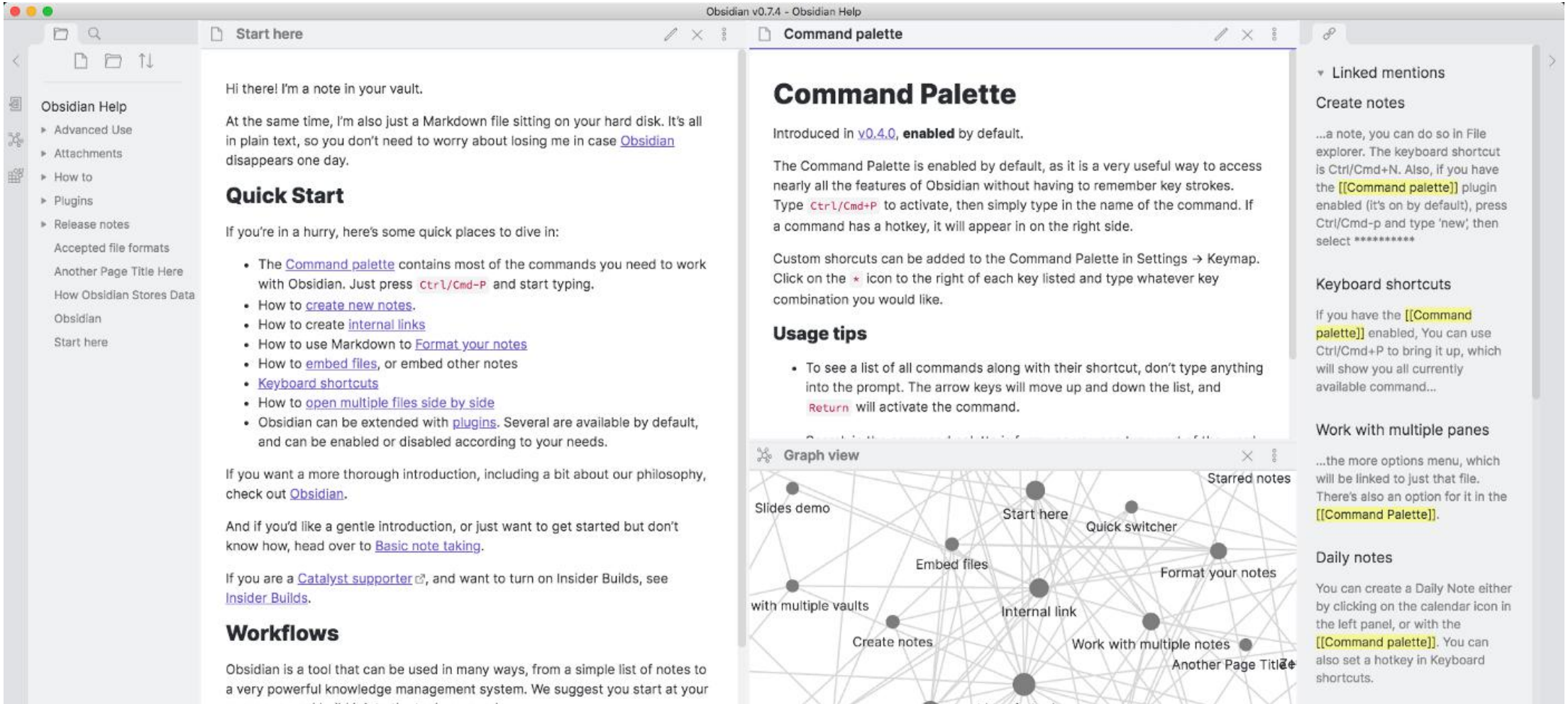
- Focus on **capture** & **task management** (individual): ⇔ 👷 gardener
  Evernote, Mem, Todoist, Meistertask, Akiflow, Bear…
- Focus on **project management** (team): ⇔ 👷 architect
  Notion ★, Trello, OneNote…
- Focus on **knowledge base** development:
  Obsidian ★, Workflowy
- Focus on **creative writing**:
  Scrivener, Ulysses

Notion

- ➕ Large user base, integrations, plugins
- ➕ Templates, structure, database/tables (relevant?)
- ➕ Collaboration (team)
- ➖ Slow if lots of content (→ not ideal for large knowledge base?)



Knowledge base management:
Workflowy & Obsidian



Remember: “It’s a PhD, not a Nobel Prize” (Mullins & Kiley, 2002)

Download this presentation

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