



*I was never taught how to do this*

# Reference management








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**KU LEUVEN**




# IWNTH: Reference management

-  Ref manager: why? which?
-  Zotero: adding & citing refs
-  Zotero: organizing
-  Zotero: plugins
-  Note-taking

# IWNTH: Reference management

## Ref manager: why? which?

 Zotero: adding & citing refs

 Zotero: organizing

 Zotero: plugins

 Note-taking

# 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

cambridge.org/core/jo...  



- **Most reliable:**  + DOI / ISBN

- **With PDFs:** drag-and-drop PDF (+ Retrieve Metadata for PDF if necessary)

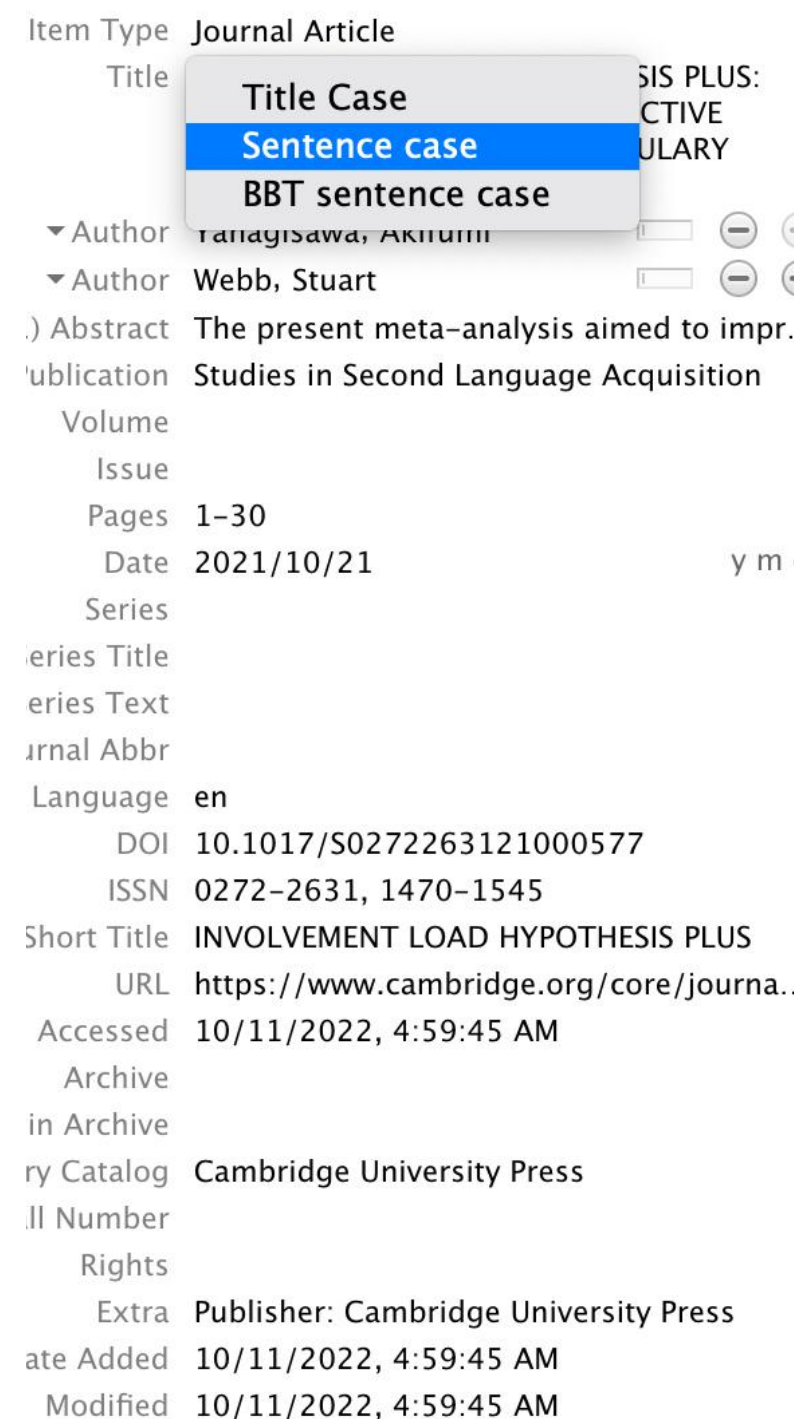
- **Last resort:**  Manual entry



# 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

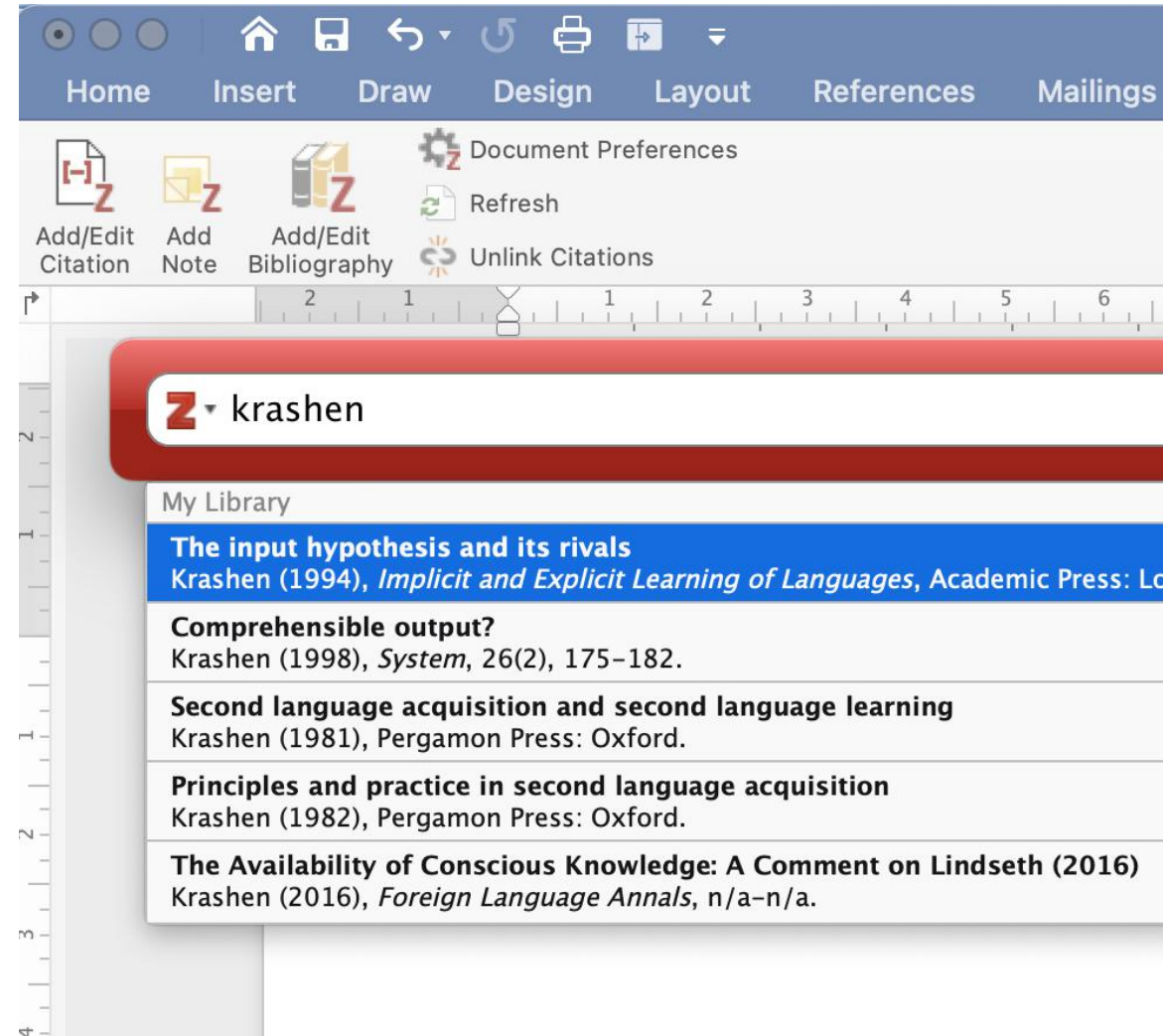


The screenshot shows a Zotero entry for a journal article. A context menu is open over the title field, offering three options: "Title Case", "Sentence case" (which is highlighted in blue), and "BBT sentence case". The entry details are as follows:






- Item Type: Journal Article
- Title: INVOLVEMENT LOAD HYPOTHESIS PLUS
- Author: Tanigisawa, Akihiro
- Author: Webb, Stuart
- Abstract: The present meta-analysis aimed to improve understanding of the relationship between involvement load and second language acquisition.
- Publication: Studies in Second Language Acquisition
- Volume: 20
- Issue: 1
- Pages: 1-30
- Date: 2021/10/21
- Series: Involvement Load Hypothesis Plus
- Series Title: INVOLVEMENT LOAD HYPOTHESIS PLUS
- Series Text: INVOLVEMENT LOAD HYPOTHESIS PLUS
- Journal Abbr: Studies in Second Language Acquisition
- Language: en
- DOI: 10.1017/S0272263121000577
- ISSN: 0272-2631, 1470-1545
- Short Title: INVOLVEMENT LOAD HYPOTHESIS PLUS
- URL: https://www.cambridge.org/core/journals/studies-in-second-language-acquisition/article/INVOLVEMENT-LOAD-HYPOTHESIS-PLUS/10.1017/S0272263121000577
- Accessed: 10/11/2022, 4:59:45 AM
- Archive: Cambridge University Press
- in Archive: Cambridge University Press
- ry Catalog: Cambridge University Press
- il Number: Cambridge University Press
- Rights: Cambridge University Press
- Extra: Publisher: Cambridge University Press
- ate Added: 10/11/2022, 4:59:45 AM
- Modified: 10/11/2022, 4:59:45 AM

# Zotero: citing

- Choose Citation Style
  - 10,352 styles available: journals...
  - check language (APA)
- Copy Citation (  /   A )
- Copy/export Bibliography (  /   C or - In **Word**: Zotero add-in
  - > Page number
  - > 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

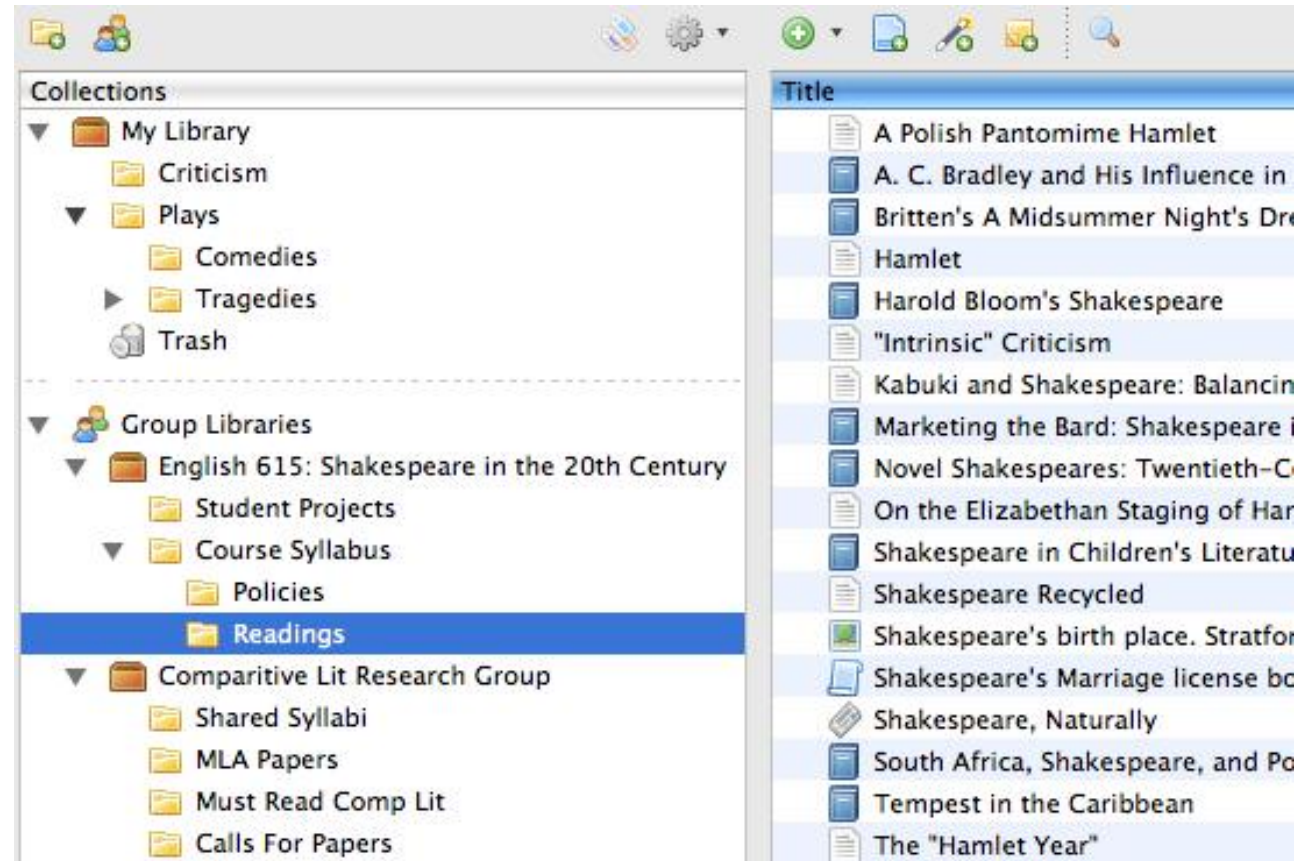
- All the literature is not equally important.
- Prioritize based on relevance + quality:
  - **A**: best quality + most relevant → read and re-read
  - **B**: high quality + relevant, but not essential
  - **C**: maybe interesting (ok quality, not clearly relevant) → keep for later
  - **D**: not relevant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

(Hayton, [2018](#))






# Zotero: collaborating

Create an account on [Zotero.org](https://www.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)



- 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 Intergeration...	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 grow		✔ 5	⊗ 1	⊗ 154
>  The skewness of scientific productivity	Ruiz-Castillo and Costas	✔ 5	⊗ 1	⊗ 24

- View PDF
- View Online
- View Snapshot
- Show File
- Add Note
- Add Attachment >
- Duplicate Item
- Move Item to Trash...
- Export Item...
- Create Bibliography from Item...
- Generate Report from Item...
- Refresh tallies from scite
- View scite report


# Better Bib(La)TeX

- For integrating with LaTeX

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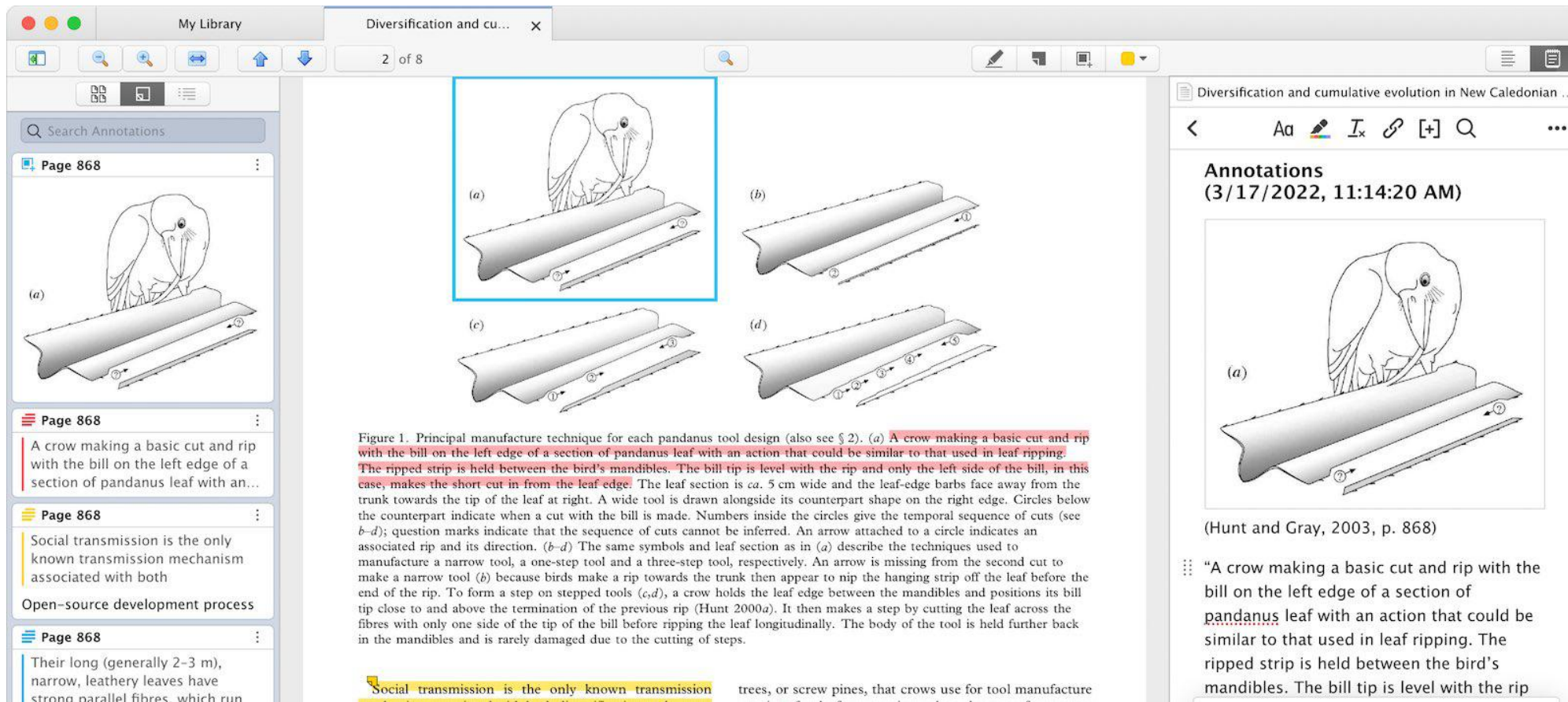
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 Zotero: plugins

 Note-taking

# Note-taking and highlighting in Zotero

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



The screenshot displays the Zotero 6.0 interface. The main window shows a PDF document titled "Diversification and cu...". The document content includes a figure with four panels (a, b, c, d) illustrating the manufacture of pandanus tools by a crow. Panel (a) shows a crow making a basic cut and rip. Panels (b), (c), and (d) show the progression of cuts to create narrow, one-step, and three-step tools, respectively. The text below the figure describes these techniques in detail. The left sidebar shows a search for annotations on page 868, with results for "A crow making a basic cut and rip..." and "Social transmission is the only known transmission mechanism...". The right sidebar shows the "Annotations" panel for the selected text, displaying the same illustration of the crow and the associated text.

Figure 1. Principal manufacture technique for each pandanus tool design (also see § 2). (a) A crow making a basic cut and rip with the bill on the left edge of a section of pandanus leaf with an action that could be similar to that used in leaf ripping. The ripped strip is held between the bird's mandibles. The bill tip is level with the rip and only the left side of the bill, in this case, makes the short cut in from the leaf edge. The leaf section is ca. 5 cm wide and the leaf-edge barbs face away from the trunk towards the tip of the leaf at right. A wide tool is drawn alongside its counterpart shape on the right edge. Circles below the counterpart indicate when a cut with the bill is made. Numbers inside the circles give the temporal sequence of cuts (see b-d); question marks indicate that the sequence of cuts cannot be inferred. An arrow attached to a circle indicates an associated rip and its direction. (b-d) The same symbols and leaf section as in (a) describe the techniques used to manufacture a narrow tool (b) because birds make a rip towards the trunk then appear to nip the hanging strip off the leaf before the end of the rip. To form a step on stepped tools (c,d), a crow holds the leaf edge between the mandibles and positions its bill tip close to and above the termination of the previous rip (Hunt 2000a). It then makes a step by cutting the leaf across the fibres with only one side of the tip of the bill before ripping the leaf longitudinally. The body of the tool is held further back in the mandibles and is rarely damaged due to the cutting of steps.

Social transmission is the only known transmission mechanism associated with both trees, or screw pines, that crows use for tool manufacture



Annotations  
(3/17/2022, 11:14:20 AM)

(a) "A crow making a basic cut and rip with the bill on the left edge of a section of pandanus leaf with an action that could be similar to that used in leaf ripping. The ripped strip is held between the bird's mandibles. The bill tip is level with the rip and only the left side of the bill, in this case, makes the short cut in from the leaf edge. The leaf section is ca. 5 cm wide and the leaf-edge barbs face away from the trunk towards the tip of the leaf at right. A wide tool is drawn alongside its counterpart shape on the right edge. Circles below the counterpart indicate when a cut with the bill is made. Numbers inside the circles give the temporal sequence of cuts (see b-d); question marks indicate that the sequence of cuts cannot be inferred. An arrow attached to a circle indicates an associated rip and its direction. (b-d) The same symbols and leaf section as in (a) describe the techniques used to manufacture a narrow tool (b) because birds make a rip towards the trunk then appear to nip the hanging strip off the leaf before the end of the rip. To form a step on stepped tools (c,d), a crow holds the leaf edge between the mandibles and positions its bill tip close to and above the termination of the previous rip (Hunt 2000a). It then makes a step by cutting the leaf across the fibres with only one side of the tip of the bill before ripping the leaf longitudinally. The body of the tool is held further back in the mandibles and is rarely damaged due to the cutting of steps." (Hunt and Gray, 2003, p. 868)

# 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?)

# Roadmap

by Status ▾

Properties

Group by Status

Filter

Sort

🔍 Search

...

New

Started 12

...

+

In Progress 5

...

+

Complete 🤖 5

## Open Bugs

Camille Ricketts

Nate Martins



20

## Mobile Start Up Time

Camille Ricketts

David Tibbitts  Andrea Lim

## Open Codes

Andrea Lim  Cory Etzkorn

21

## Onboarding

 Andrea Lim Nate Martins

Epic 🏔️

## Rewriting Flow

 David Tibbitts Camille Ricketts  Nate Martins Andrea Lim

Task 🛠️

Sprint 23

## Landing Page Redesign

 Cory Etzkorn Nate Martins  Andrea Lim

## Rewrite Query Caching Logic

 David Tibbitts Cory Etzkorn

Task 🛠️

Sprint 23

Sprint 24

## Mobile

 Ben Lang Cory Etzkorn

Task 🛠️

Sprint 23

## Sharing Permissions

 David Tibbitts Cory Etzkorn



# Knowledge base management: Workflowy & Obsidian

The screenshot displays the Obsidian v0.7.4 interface. On the left is a sidebar with 'Obsidian Help' and a list of topics. The main area shows a note titled 'Start here' with a 'Quick Start' section. A 'Command palette' window is open, displaying a list of commands and their shortcuts. At the bottom, a 'Graph view' window shows a network of interconnected nodes representing notes in the vault.

Obsidian v0.7.4 - Obsidian Help

Start here

Command palette

Obsidian Help

- Advanced Use
- Attachments
- How to
- Plugins
- Release notes
- Accepted file formats
- Another Page Title Here
- How Obsidian Stores Data
- Obsidian
- Start here

Hi there! I'm a note in your vault.

At the same time, I'm also just a Markdown file sitting on your hard disk. It's all in plain text, so you don't need to worry about losing me in case [Obsidian](#) disappears one day.

## Quick Start

If you're in a hurry, here's some quick places to dive in:

- The [Command palette](#) contains most of the commands you need to work with Obsidian. Just press `Ctrl/Cmd+P` and start typing.
- How to [create new notes](#).
- How to create [internal links](#)
- How to use Markdown to [Format your notes](#)
- How to [embed files](#), or embed other notes
- [Keyboard shortcuts](#)
- How to [open multiple files side by side](#)
- Obsidian can be extended with [plugins](#). Several are available by default, and can be enabled or disabled according to your needs.

If you want a more thorough introduction, including a bit about our philosophy, check out [Obsidian](#).

And if you'd like a gentle introduction, or just want to get started but don't know how, head over to [Basic note taking](#).

If you are a [Catalyst supporter](#), and want to turn on Insider Builds, see [Insider Builds](#).

## Workflows

Obsidian is a tool that can be used in many ways, from a simple list of notes to a very powerful knowledge management system. We suggest you start at your

## Command Palette

Introduced in [v0.4.0](#), **enabled** by default.

The Command Palette is enabled by default, as it is a very useful way to access nearly all the features of Obsidian without having to remember key strokes. Type `Ctrl/Cmd+P` to activate, then simply type in the name of the command. If a command has a hotkey, it will appear in on the right side.

Custom shortcuts can be added to the Command Palette in Settings → Keymap. Click on the `*` icon to the right of each key listed and type whatever key combination you would like.

## Usage tips

- To see a list of all commands along with their shortcut, don't type anything into the prompt. The arrow keys will move up and down the list, and `Return` will activate the command.

## Graph view

Starred notes

Slides demo

Start here

Quick switcher

Embed files

Format your notes

with multiple vaults

Internal link

Create notes

Work with multiple notes

Another Page Title

## Linked mentions

### Create notes

...a note, you can do so in File explorer. The keyboard shortcut is `Ctrl/Cmd+N`. Also, if you have the [\[\[Command palette\]\]](#) plugin enabled (it's on by default), press `Ctrl/Cmd-p` and type 'new', then select \*\*\*\*\*

### Keyboard shortcuts

If you have the [\[\[Command palette\]\]](#) enabled, You can use `Ctrl/Cmd+P` to bring it up, which will show you all currently available command...

### Work with multiple panes

...the more options menu, which will be linked to just that file. There's also an option for it in the [\[\[Command Palette\]\]](#).

### Daily notes

You can create a Daily Note either by clicking on the calendar icon in the left panel, or with the [\[\[Command palette\]\]](#). You can also set a hotkey in Keyboard shortcuts.



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



[Download](#) this presentation

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🌐 <https://serge.bibauw.be>