

Developing a research workflow ¹

There is no one “right” workflow. The practices that make the most sense for you depend on the kinds of sources you’re working with, and your own research habits.

Learning goals for today:

- start to develop/enhance your research workflow
- learn about some digital tools that can help or improve your research workflow

In order to start tackling these goals:

- Think for just a few minutes about what your research process is. What challenges are you facing? What is going well?
- Tell the person next to you about your process and any speedbumps you’ve encountered so far.

Think about how you engage in research. Are you working with a lot of printed sources? Using archival sources? Are you primarily using a computer? Depending on the answer, you’ll need a digital tool (or tools) that let you capture your sources quickly and easily.

Working with printed sources will require you to transfer information—the citation, notes, and pdf’s of articles or chapters—into an online venue, for easier recall and research.

Some “capture” tools ideal for print-heavy research:

RefWorks – UD library has a license, which allows you to open an account for free

Zotero – free bibliographic management tool that works with Firefox or on its own

<http://www.zotero.org>

Mendeley – free software that’s ideal for managing and sharing citations and research papers. Ideal if you have lots of pdf’s; compatible with Zotero.

<http://www.mendeley.com/>

How are you currently taking notes on what you read? Sync your research practices with digital tools, while harnessing the most from whatever you’re using to sustain your engagement with writing, and to eliminate moments of “Did I actually read that?” Tip from Dr. Lobasz: write 1-2 sentences about how the source you’ve found relates to your research. This will save you loads of time later when you’re trying to remember “Why did I save this citation?”

Some note-taking / writing tools:

Evernote – free software for Macs and PCs that allows you to take notes and store them; will sync with other computers and devices - <http://evernote.com/>

Google docs – free, platform-independent software that allows you to take notes and store them in the cloud. Ideal for researchers engaged in team-based projects

Papers – subscription-based software for Macs and PCs for managing and sharing citations and research papers - <http://www.mekentosj.com/>

Scrivener – subscription-based software for Macs and PCs that’s ideal for long-form writing; organizes writing into drafts and research, and within each are folders and documents - <http://www.literatureandlatte.com/scrivener.php>

Microsoft OneNote – subscription-based software for PCs that allows for long-form writing; organizes writing into pages and notebooks
<http://office.microsoft.com/en-us/onenote/>

¹ Crafted by Meg Meiman on June 12, 2012. Adapted from Miriam Posner’s workshop “Digital Scholarship Commons workshop” at Emory University (no longer online, alas), and William J. Turkel’s “How To: A Workflow for Digital Research Using Off-the-Shelf Tools.” (His website is referenced on pg. 2.)

No matter what, develop a back-up plan for your references, sources, notes, and data.

- **Back-up practice #1:** back up your references and notes in at least two online places, preferably three. (example: saving your notes in Google docs, as Word documents on your computer, and Dropbox.com)
- **Back-up practice #2:** use one online ‘place’ as your “research home base,” putting everything there first, then save it to other places.
- **Back-up practice #3:** try to keep the file and folder structure of your 2-3 back-up places as similar as possible, so you can stay more organized.

Some handy back-ups:

- Dropbox.com – this free (for up to 2 GB), platform-independent software allows you to save your files, pictures, and data online. <http://www.dropbox.com>. Handy tip from Audrey: increase your Dropbox space by sharing folders with friends. (Thanks, Audrey!)
- Time Machine – a free (usually pre-installed) backup feature for Mac users
- Backup and Restore – a free (usually pre-installed) backup feature for PC users

If it ain’t broke, fix it anyway. Making small adjustments to your research workflow over time will only help. “Adjustments” can include anything from tweaking the order in which you save citations and take notes, to incorporating another software program into your workflow.

Keep tabs on your writing and research time. Tracking the duration and time(s) of day you devote to research and writing will not only make you more conscious of your efforts, but will also keep you on track, inspire you to increase your time, and help you discover what times of day, kinds of music, air temperature, and other seemingly-unrelated variables impact your writing and research. Example: writing in the morning while listening to Mozart keeps me going, since there aren’t any distracting vocals, but the music has enough of a tempo to keep me awake. Mozart = time to write. (Think Pavlov.)

Want more? For a more involved description of digital research workflows, see William J. Turkel’s “How To,” at <http://williamjturkel.net/how-to/>

For more digital research and writing tools, visit the Digital Research Tools (DiRT) wiki, a site that collects information about digital research tools for researchers in the humanities and social sciences: <https://digitalresearchtools.pbworks.com>

Workflow example #1:

I find a book related my research project, and use the library catalog and Zotero to “grab” the book’s citation information and put it into Zotero on my computer. Then I start reading and taking notes—usually in the margin. Then I sync my Zotero files on my computer with my “cloud” account in Zotero.

Zotero is my “grabber,” and Mendeley is my Ultimate Notes Repository + Ultimate Backup for citations. So I sync my Zotero files on my computer with the Mendeley account on my computer, *and* my Mendeley “cloud” account. Finally, I transfer my written notes from the book into Mendeley. Later, when I begin writing, I troll through my sources in Mendeley to review what I’ve already read, and see if it can be incorporated into my writing.

Workflow example #2:

I find the pdf of an article about my research project. I export the pdf to my RefWorks account, which “grabs” the citation information from the article. Then I save the pdf to my desktop, and attach it to the RefWorks Citation. I love killing trees, so I print out the article and annotate it with a pen, then transfer my handwritten notes to the “notes” section of RefWorks, and add some descriptors (keywords) that will help me remember the article. Later, when I start writing, I vaguely recall finding an article about Jane Austen and zombies, and lo: a quick search in my RefWorks folders reveals that very article, as well as my transcribed notes.