
Navigating Research: Effective Note-Taking and Literature Management Techniques

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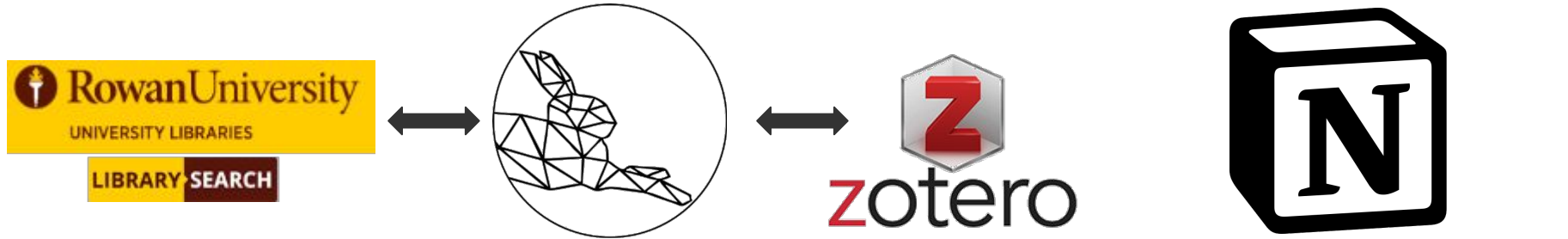
What This Presentation Is and Is Not

This presentation is not the end-all, be-all of research management advice! This is only an example of one method that you can use to organize your reading material and take notes on what you read. It may not work for you! But it may give you ideas for what *will* work for you.

There are as many effective research management methods as there are scholars doing research. The best thing you can do for yourself is try to expose yourself to as many research management techniques as possible.

There are hundreds of YouTube videos, blog posts, and articles created by scholars just like you where they explain their process in detail. Watch and read those. Figure out what approaches, apps, and processes fit your learning style, and implement them in ways that are easiest and most effective *for you*.

Workflow Overview



Rowan Library Search

Research Rabbit

Zotero

Notion

Looking for Basic Research

https://primo.rowan.edu/discovery/search?vid=01ROWU_INST:ROWAN

Finding Further Related Research and Putting It In Context

<https://researchrabbitapp.com/home>

Annotating and Keeping Track of Everything You Read or Need to Read

<https://www.zotero.org/>

Taking Notes in a Way that Works for You and Your Project

<https://www.notion.so/>

Finding Literature – Quick Guide

Rowan Library Search

Rowan is subscribed to the most commonly used databases for university researchers, which makes the library's all-resources search function the best place to start when looking for sources. Just remember to log in using your Rowan ID, and use the Favorites tool to keep track of what you find.

Research Rabbit

Once you have the foundations of your topic covered, you can use Research Rabbit to find as many connected articles as possible. Research Rabbit will show all articles it can find related to a topic, how those articles connect via reference lists, and the order in which they were written.

Core Principles of Effective Literature Management

Keep Track of Everything You Read or Find

- No matter if it's useful to you or not, save and label every article you read or find so that you know what you've already done

Use Reference Management Software

- Once you've found or read something, save it to a reference manager, like Zotero, Endnote, Mendeley, etc.

Double-Check that the Citation Information is Complete and Correct

- When saving your source, make sure that all of the information collected by your reference manager is correct, so that you don't have to worry about academic integrity issues further down the line.

Organize Your Sources According to Subject and Whether It's Been Read

- Use folders and tags in your reference manager to set up consistent keywords related to your research, and apply them to each source as you find it in order to keep your sources organized and accessible

Demonstration: Using Zotero

1. Find an article using Rowan Library Search
2. Save the article to Zotero using the web extension
3. Make sure that the citation info in Zotero is correct
4. Download the PDF and save it to an easy and organized place in your computer
5. Attach the PDF to the entry in Zotero for safekeeping and later notetaking
6. Add consistent keyword tags and use folders to organize your articles

Once you have a solid couple of sources saved in Zotero, you can use your Zotero folder to find more Research Rabbit sources.

Core Principles of Effective Note-Taking

Prioritize Your Readings and Track Progress

- When you find enough articles that seem important and you would like to begin doing the work of reading them, skim through their titles, authors and abstracts to see which ones seem like they will be the most useful to you and your project. Read the most important ones first.
- If you are using a note-taking system that has multiple steps, keep track of how far along in the process you are for each source.

Use a Note-Taking System that Addresses Your Strengths and Weaknesses

- Your needs as a learner, scholar and writer are different from everyone else's, and there are hundreds of approaches to note-taking that you can mix and match from. Do what feels natural and helpful to you, and do away with anything that feels like a burden or not useful.
- Example Note-Taking Systems:
 - The Zettelkasten Method
 - The Cornell Method
 - The Charting Method
 - Concept Mapping
 - The Flow Method

Example: Modified Zettelkasten Note-Connecting System

The most important thing about a Zettelkasten system is that you are connecting the knowledge you are gaining from one source to all of the knowledge that you have gained from other sources. There are many ways to do this, but my favorite is by using a tagging system, and my favorite place to do that is in Notion.

1. Set up a Reading List database in Notion.
2. Set up a Tags database, with all of the subjects that you will be potentially covering in your research. (You can add more tags later as needed.)
3. For each text in your Reading List database, create a new Notion page, and assign that page as many tags as are relevant from your Tags database.
4. Now, whenever you click on that tag, you will see every article/reading/etc. that you have found that relates to that idea.

Example: Modified Zettelkasten Note-Taking System

Annotation Notes — brief notes taken while consuming content (i.e. reading an article, listening to a podcast, watching a video); these are usually taken in the form of margin notes, annotations, and highlighting

Literature Notes — notes pulled out of the content and placed without context into a note-taking space, like a notebook or a Notion page; these are summaries or quotes from the content itself

Permanent Notes — notes that include the context for a given literature note; these include *how* the information in the literature note is intended to be used, what the information means to you, and why it's important

Four Types of Permanent Notes:

- **Things to Read** These notes keep track of the resources used in the article you are reading, and why you should look for and read that resource.
- **Actionable Items** These notes keep track of ideas in the text that you can use directly, in order to do things like give context for something you have done in your research, explain the history of the issue you are exploring, or even use as part of your research instrument.
- **Things of Interest** These notes keep track of things that you find interesting or surprising in a text, but that you haven't figured out how or if you'd like to use it.
- **Free Notes** These are just general notes. If something you would like to keep track of doesn't fit into any of the above categories, then you can keep it here

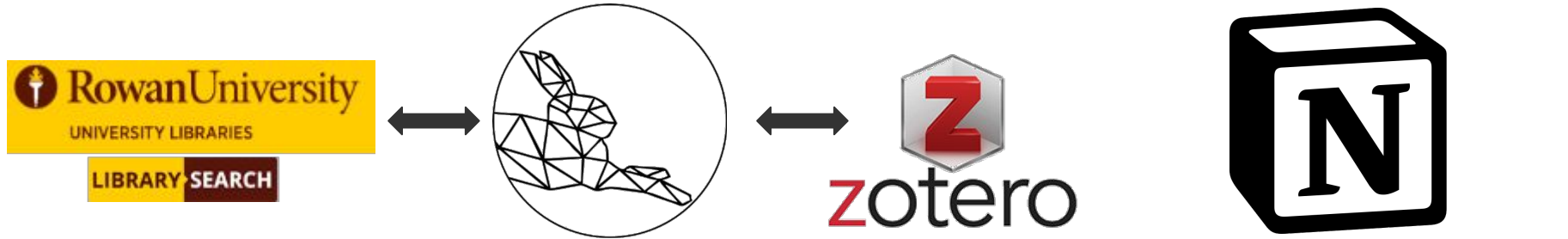
Know What to Focus On

Not every article you find in your literature research journey is going to get the in-depth note-taking approach described in this presentation, and *that is a good thing*. Knowing what information needs your extreme focus (what ties directly into your project and needs to be read carefully) and what information is more background detail is necessary for successfully keeping yourself sane in the literature research process.

[Kjell Rudestam and Rae Newton](#) (summarized here by [Cally Guerin](#)) use a film-making metaphor that helps students to understand how they should treat each source they find.

- **Long shots** are used for background information and context setting. The reading might be a relevant book or an early study in the field. The doctoral writer needs to show they know about it, but the details are not crucial for this particular project. Very often, it is sufficient to read the introduction and conclusion of these items (and the table of contents if it is a book) as a first pass; the doctoral writer can always return later to glean more details if it becomes clear that this is more important to the project than initially recognised.
- **Medium shots** require more detail as they move closer in to the specific focus of the study. Summarising notes that go further than the accompanying abstract will be necessary, but probably a quick read of introduction, headings and subheadings, and topic sentences will suffice.
- **Close ups** are where the fine details start to matter much more. These are the articles and theories that are central to the project, and yes, they do need to be read carefully, probably more than once, to ensure very clear and accurate understanding of their contribution. These are the key texts for the project and provide the core of the literature review.

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Other Resources

Video Guides:

Connecting Zotero and Notion to Create an Automatic Reading List Database

https://www.youtube.com/watch?v=8RFFxFcrLCo&t=190s&ab_channel=HollyJane

Readings:

A blog post on how to take notes with a view ahead towards how you will use those notes in a thesis or dissertation, even if you don't know the whole topic yet.

<https://doctoralwriting.wordpress.com/2015/11/27/the-literature-review-for-beginners-writing-while-still-uncertain/>

Library Workshops:

To see a list of library workshops on things like EndNote, Zotero, and general research strategies, you can go to this website.

<https://libguides.rowan.edu/libraryworkshops>

Zettelkasten Notion Template

Template Link:

<https://functional-bobolink-863.notion.site/Modified-Zettelkasten-Template-105cd6710ed2818b8b53eec851be399f>