



# Organizing Your Research

**Hugo van Harlo, May 2018:** Sometimes, finding your own notes is harder than finding sources. *Is it on an index card? A Word doc? Saved email? Notebook? Did I take a photo of it?* This is the current iteration of the workflow and tools I use to manage my own research as a historian. Your own system will vary; use what you find usable!

## Software and Tools

My primary goal is to be both paperless and usable on multiple devices. A secondary objective is to minimize the number of tools and programs I use.

### ORGANIZATIONAL TOOLS

*These programs are the core of my research management. They all have free versions but require a purchase or subscription for additional storage or, in the case of Evernote, devices.*

#### Google Drive

<http://www.google.com/drive/>

Cloud-based file storage with sharing capabilities

- Requires installation on your desktop (Backup and Sync) sync local files to the cloud + mobile apps.  
<https://www.google.com/drive/download/backup-and-sync/>

#### Evernote

<http://evernote.com>

Cloud-based note taking and document organization

#### Mendeley

<http://mendeley.com>

Reference & citation management

- A good read on Mendeley's features:  
<http://at.blogs.wm.edu/why-i-settled-on-mendeley-for-organizing-research/>

#### LibraryThing

<http://librarything.com>

Catalog and organize your personal (physical) library

### PREPATORY TOOLS

- **LightShot:** Desktop Screen Captures  
<http://app.prntscr.com>
- **Pandoc:** File Conversion  
<http://www.pandoc.org>
- **Office Lens:** OCR Scanning of Images  
<https://www.microsoft.com/en-us/store/p/office-lens/9wzdncrfj3t8>  
<https://play.google.com/store/apps/details?id=com.microsoft.office.officelens>  
(Mac alternative: VueScan)

### AUTOMATION TOOLS

*I'm not currently using these tools, but I can't shake the feeling of an opportunity to further streamline my workflow.*

- **File Juggler:** Automated Files Management  
<https://www.filejuggler.com>  
(Mac alternative: Hazel)
- **IFTTT:** Connecting Disparate Web-Based Services  
<http://ifttt.com>

### CHROME EXTENSIONS

- **Save to Google Drive** (I find this to be clunky and typically manually save my downloads, instead)  
<https://chrome.google.com/webstore/detail/save-to-google-drive/gmbmikajjgmnabiglmofipeabaddhgne>
- **Evernote Web Clipper** (not for sources!)  
<https://chrome.google.com/webstore/detail/evernote-web-clipper/pioclpplcdbaefihamjohnfbikjilc>
- **LibraryThing Add-a-Book** (copy and paste ISBNs)  
<https://chrome.google.com/webstore/detail/librarything-add-a-book/mlgpilnojjemdgmkbjleanfcdjnikdh>

# Getting Started

1. Install the Organizational Tools above.
2. Think through a central set categories that align with your research focuses and secondary tags with narrowing subjects.
3. Create those folders - start with Google Drive, then Mendeley, LibraryThing, and Evernote .
4. Add Sources, Scholarship, and reference files to Google Drive using your folder structure.
  - a. Keep Mendeley-destined files (e.g. journal articles, theses, and ebooks) in a “watched folder” that Mendeley will import from.
  - b. Start scanning index cards and importing emails and Word .docs as needed.

# The Basic Workflow

*The goal here is to find the Goldilocks sweet spot that is both easy and quick enough to use, but also provides enough detail to effectively manage and search through lots of sources and notes.*

## The Big Two:

1. Sources and references are kept in Google Drive.
2. Your notes ALWAYS go into Evernote via a relevant notebook and given relevant tags. ALWAYS.

## Secondary Considerations:

3. Secondary digital sources (journal articles, theses) are managed via Mendeley so they can be easily cited.
4. Your LibraryThing collection should be occasionally exported and then imported into Mendeley.
5. Mendeley and LibraryThing’s metadata tools aren’t perfect. Sometimes you’ll need to clean them up.
6. Discipline will pay off in the long run, but organizing your own notes is more important in the short term.

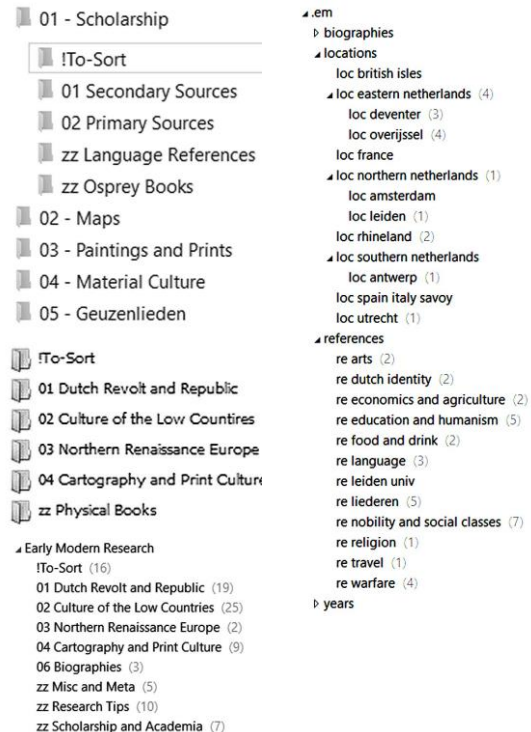


If You Have Questions or Want Lecture Notes, Please Contact HUGO VAN HARLO

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# ON LABELLING

Everybody’s system of folders and labels will be different; but be consistent with your own system!



# Backups

*I have yet to discover an elegant or automated solution!*

1. **Evernote** databases are manually exported into a GDrive backup folder every so often.
2. **LibraryThing** is exported as a spreadsheet, converted to .bibtex format, and then unified into Mendeley (requires merging duplicates).  
<http://kevin.godby.org/lt2bib/>
3. **Google Drive** is already in the cloud and on my desktop, so I rarely back it up (a bad practice).