The Gentle Art of Bibliography

# Title slide [slide 1]

# Introduction [slide 2]

Have you ever forgotten where you read something useful? You know the scenario – whilst you’re searching for something, whether on the web, in the library or in a database, you flick past something that’s perhaps only of tangential interest, only to realise later that it was more significant than you thought. Or you’re just killing time, so you’re not in full scholar-mode, and you find something interesting that is so relevant that you just know you’ll be able to find it again?

But you can’t.

Isn’t it an awful feeling? It’s so frustrating, and now you’re going to spend far more time trying to track that reference down again.

I’m not here in front of you today as a shining example of someone who totally has their referencing sorted. However, my career has combined being an academic librarian with doing a PhD and a postgraduate teaching certificate, and now for some years enjoying partial secondment from librarianship as a postdoctoral researcher. I like to think that this experience does at least make me a reliable witness to what works, and what is less effective.

And if there are two truisms that must be stated at the outset, the first is that everyone is different, and the second, that one should take nothing as self-evident.

For example, when I’m instructing new undergraduates in good library skills, I am very conscious that our very international student body has enjoyed different styles of teaching, different kinds of studying, and different forms of assessment. I work in a Conservatoire, and it is perfectly possible that a music student may arrive with phenomenal performance skills, but comparatively little experience in writing essays, and even less in citing the resources they used. This was particularly brought home to me a few years ago, when I was helping a talented blind student to sort out their references. If anyone attending this session has a visual impairment, they’ll understand exactly what I am saying.

In ordinary circumstances, I would normally begin by explaining how to insert a footnote, like this:-

‘Well, if you want to use footnotes, then you go to this drop-down here, and that inserts a footnote number in superscript, and then you can give the details in the footnote at the bottom of the page …’

It wasn’t going to be that straightforward.

Even if you understand the purpose of a footnote, it may be completely counter-intuitive to organise knowledge that way – a methodology that suits sighted people, but not the hapless student just trying to complete an assignment in an unfamiliar format. Furthermore, sighted students have usually seen references in books or journal articles, so they have an idea what they look like. However, screen-reading software may not have imparted that awareness.

Using a drop-down menu – which you’ve had to access a different way, because you can’t see it – is challenging in itself. It’s worse if you try to do something that is completely alien to you. The concept of a footnote or end-note is bad enough. But the word ‘superscript’ is meaningless if you don’t read normal text. It isn’t even a word in normal parlance!

So, when I speak to a group of students from different backgrounds, I try not to assume that everyone has the same level of knowledge, especially when it’s something that is second-nature to me. However, it’s reasonable to assume that any doctoral student has probably already written some assignments that required referencing of some kind. (I take ‘referencing’ and ‘citation’ to be synonymous – I should state that straight away!) Even if you haven’t written a dissertation as such, you have probably submitted written work as part of your first degree. You are familiar with the general concept that you need to say which resources you used, and that there are recommended ways of referring to them. You’ll be expected to format your references correctly and consistently. My concern today is to encourage you to look back at those early efforts, and to try to establish which practices were helpful, and where you might have come unstuck.

‘I’ve got this quote’, an undergraduate student said to me a few years ago, ‘but I have no idea where it came from. And I want to cite it.’

Did you know that the Google Books website can be astonishingly helpful in this regard? By typing in a meaningful phrase from the quote, enclosed in double quotation marks, you can often find not only the source of the quote, but also the page number. It worked on that occasion.

# Note-Taking (some comments) [slide 3]

However, Googling meaningful phrases several months after you found them, is certainly no substitute for keeping track of your data from the outset. I would recommend that you keep a note of the resources you use, right from the start of your research – well before you start writing papers or thesis chapters. What I’m proposing is really not rocket-science! When you’re taking notes from any written source, it only takes a minute to start by recording the bibliographical details of the source. At the very least, you need the author’s name, the title, publisher and date. If it’s in a journal, you need to note the volume and issue.

And if you decide to copy out a quotation, it only takes seconds to start by noting the page where you found it, enclosing the quote in quotation marks, and even indenting it on your page if that helps. Without doing this at the time, then it might be difficult to work out where the quote ends and your own notes begin, some months or years later.

Finally, there are times when we prefer to use paper, and others when we take notes on a digital device. Since it’s much easier to search back through something on a computer, have you considered keeping a brief research log online, to help you find those handwritten notes later? Even something like, ‘Tuesday 6th. Everett article. Tradition. Folk groups,’ might save you time later. Think about file names, too. My research log entries are all dated, in the order year-month-day, followed by a significant keyword if I have only focused on one particular detail.

I think that, perhaps because of my librarianship background, my approach to information-handling is probably a bit different to other folk without that background. However, there’s one concept that is worth sharing, and that is to remind you that when you search a library catalogue, the research engine will only find words that are in the catalogue entry. And If you search a database that aggregates a lot of different electronic resources, again, it will only retrieve words that are there. Some search engines are clever about finding words that nearly match – for example, they might retrieve ‘theatre’ in the English spelling or ‘theater’ in the American. However, when it comes to using Windows Explorer to search your notes, you can’t expect the same gold standard! Applying my librarian brain to the problem, I’m careful to ensure that I add a few keywords to my note-taking, to help me retrieve the notes later – eg ‘Scotland, Scottish, Education Act’, to ensure I’ll find the details whichever word I search on. Similarly, it isn’t always helpful to use a lot of abbreviations, unless you’ve also got the word in full, somewhere in your notes. If the keyword isn’t there, it won’t come up when you search your notes later!

# Your Bibliography should be a separate document, which you keep up to date [slide 4]

So, we come to bibliography proper. I did not want to make this talk prescriptive – indeed, I cannot, because different institutions and possibly even different faculties will prefer different stylistic approaches to referencing. In my experience, Harvard referencing with end-notes and a bibliography, seems to be very common. Other universities or faculties might say that they want you to use Chicago referencing, or the MHRA (Modern Humanities Research Association) *Style Guide*. There are many more style guides, if you go looking for them! It is entirely between you and your supervisor or graduate school, as to whether you should use footnotes or endnotes, the minimalist Harvard bracketed dates and pages, or a complete citation. My own preference is footnotes with the MHRA *Style Guide*, but we can’t always follow our own preferences!

But first, you need your own bibliography, which you’ll keep as a separate document and maintain faithfully. It’s really important that you should start compiling this at the earliest opportunity. Although it takes minimal time to note down the citation details of what you’ve read – and this will obviously include online resources, and perhaps even lecture notes – keeping a note in your own research records is still not the same as keeping a separate bibliography.

I freely admit that I have a built-in advantage! After decades of library cataloguing, I’m probably one of the fastest bibliographers on the circuit, as far as being a scholarly writer is concerned. (Indeed, there are people who dedicate themselves to bibliography – I’m not one of that special breed, just someone who has catalogued a lot of stuff in an academic library.) But, if you haven’t thought about it yet, then I urge you to start compiling your bibliography as soon as you can. It might feel like a bit of a drag, but the benefits far outweigh the inconvenience, particularly if you just add references as you go along. No-one will want to compile a bibliography once they’re already writing up their thesis. Having the data all correctly formatted, and knowing that the dates, volume and page numbers etc, are all there, will save an incalculable amount of time.

# How to create a Bibliography [slide 5]

And this brings us to the big question? How to create this magical bibliography. Let’s look at the options.

I am a devotee of Zotero, which is free bibliographical software. There are a number of packages to choose from – Mendeley is also free, but others include EndNote, RefWorks, and Cite this for Me.

However, there is nothing wrong with starting a Word document entitled ‘Bibliography’, and keeping every reference there, in alphabetical order. I did that for my own PhD, some years ago. If you keep all the citation details precisely, it’ll be a usable resource when it comes to writing research papers or the PhD thesis itself.

In my own dim and distant past, there was another, unfinished PhD – long before personal computers were even a thing. In those days, we kept boxes of handwritten index cards – and by comparison, even the Word document bibliography of my finished PhD was a miracle of organisation! I can’t recommend index cards – the whole point of a digital bibliography is that you’ve got all the data ready to insert into your document without typing the details all over again.

However, I suggest that if you do decide on the low-tech Word document, then by the time you finish writing your thesis, your bibliography may be getting close to unmanageable, and you may be disinclined to maintain it for future reference. The same goes for maintaining a bibliography on a blog. I did that for a networking project a few years ago, and it had the advantage of being publicly accessible, but that really isn’t a high priority for your PhD bibliography!

# Advantages of using Bibliographical Software [slide 6]

On the other hand, something like Zotero is readily searchable, and adding data to it is the work of a moment. Citations can be grouped into folders, and if you have it embedded into Word, then you’ll go on using it long into the future. The best thing about bibliographical software is that it can be integrated into your browser and your word-processing application, and it’ll save you a whole lot of time in the long run.

I’m not being paid to recommend Zotero above all other software! However, I should probably explain why I prefer it. It really comes down to three factors: it’s free (as is Mendeley); it works; and it’s not dependent on an institutional subscription.

I did have a Mendeley account for many years, but Mendeley did an upgrade which did not function properly for me, despite a couple of years’ emailing between myself and Mendeley. Furthermore, Mendeley requires functionality from Microsoft which we were not institutionally able to access. I was sorry to leave Mendeley (exporting my bibliographic database as I left!), because I found it very usable; but it was useless once I had the unusable upgrade.

Before Mendeley, I had an EndNote bibliography for as long as I was a postgrad student with access to an institutional subscription. I was disinclined to continue paying for it myself. RefWorks is another bibliographic software, but I have no personal experience of using it.

Cite This For Me is another subscription database, which we don’t have at RCS. I’m not sure if the free cut-down version is even still available, but I wasn’t able to recommend it, because it didn’t keep your saved references beyond a few weeks.

Whilst I’m talking about the software, Cite This For Me - and here I risk causing confusion every time – there’s a fantastic book on referencing, called *Cite Them Right*, also available as an e-book. It will tell you how to do referencing, but it’s not the referencing software called ‘Cite This For Me.’

There is sure to be someone in your institution tasked with digital technologies for learning. Alternatively, if the library subscribes to any bibliographic software, then there will be somebody there who is able to help you get started.

# A few Hints for New Bibliographical Software Users (slide 7)

I’d just like to make a few observations that are worth remembering. I’m focusing on free software, but the principles will be similar in any of them. You save details of books, articles, websites or other media, so that you can recall them from the system later on when you need to cite them.

So, for Zotero or Mendeley:-

# STARTING WITH ZOTERO PPT IMAGE (slide 8)

1. Go online to the website of your chosen software, and make an account.
2. Install the desktop version. You need it if you’re going to embed either system into Word. (In Zotero, they call this “Word Processor integration”.
3. Get the appropriate **browser extension, known as the connector**, on your browser. When you click it, a pop up will assist you to save the reference to your account, whether it’s a book, article, audiovisual resource or website. Zotero works out what kind of resource it is, eg a newspaper article, a book, or a section of a book. You can add other non-standard reference citations within the Desktop or online account.
4. Get the **add-in for your word-processing** package.
5. For Zotero - you need to go into your account to ensure the web and desktop versions are synchronised, otherwise all your info will stay in your web account and won’t go across to the desktop.
6. There’s a really quick one-minute Zotero Tutorial introduction on YouTube from McGill University. <https://youtu.be/M2wsGCqavPI> [[1]](#footnote-1)

Now, I’m not going to attempt to talk you through the installation and setting-up of any particular software. I set mine up by myself, and it was quite straightforward. More to the point, trying to help people to do this on a variety of devices in a group setting can be quite confusing! If you run into problems, do consult the educational technologists or librarians at your own university.

Similarly, I would have liked to have done a live demo of Zotero in action, but past experience tells me that Zoom and Teams don’t always show the pop-ups that are on the presenter’s screen. The best thing is perhaps to show a few screen-shots, and I’ll do that now.

In this scenario, I’ve got a paper to write - it’s about improving your concentration. I’m saving references to Zotero, incorporating them into my paper, and creating a bibliography at the end.

# Quick Demo – slides 9-25

# Now for some practical suggestions. (slide 26 - image of keyboard)

Firstly, about saving data. If you’ve added a resource to your bibliographic database, then I advise you to check the database once you’ve added it. You’re checking that all the data you may need, is actually there, in a usable format. For example, make sure you like the data in the title field – sometimes there’s more than you actually need. Again, ensure the place of publication is recorded. You never know if you might need it. If there’s a hyperlink, do check that it is a useful one. Remember the slide where I showed you the cleaned-up references?

Moreover, Zotero will save details of a musical score, but it doesn’t actually offer you the format of ‘sheet music’, so you may prefer to save it as a book rather than a general, unknown format.

Next – remember, I suggested typing keywords and the odd synonym into your notes, to help you find them again? You can do the same thing with your bibliographical software. For example, I have needed to use cost of living comparisons in my latest piece of work, and I’ve found a few websites to help me. Since they don’t all use the same keywords, I add a handful of my own: cost, currency, price, value, and comparison. They won’t show in my referencing, but by adding them behind the scenes as “tags”, I increase my chances of finding them again when I need them.

Lastly, do make use of sub-folders in your database, if you save data in different categories or relating to different topics. Just remember - if you already have Zotero open, but you’re looking at a sub-folder, then by default it will save your reference into that sub-folder unless you take steps not to do this.

All these are tiny details, but will save a lot of time later if you get them right to start with.

The next hint relates to using bibliographic software when you’re writing:- With Zotero, you need to make sure you’ve opened it before you cite from it. If you’ve got it all set up nicely, but Zotero won’t open in Word, then check that Zotero is open to start with!

Some software does work on mobile phones as well as on larger devices. However, Zotero doesn’t. There are apps that enable you to consult your Zotero database, but they won’t enable you to add to it. This inconvenience is easily fixed by emailing links to yourself. The next time you’re using a laptop, you can then shift the links into Zotero.

To finish with – I have the QR code for the McGill University YouTube introducing Zotero.

And just out of idle curiosity, I asked Chat GPT about Zotero, too. It’s much more technical than the YouTube video, but it is certainly informative!

# Note that I have not mentioned LibraryThing (slide 27)

***(https://www.librarything.com/)***

There is an online website called LibraryThing, which calls itself a library-quality catalogue. It’s easy to use, and if you would like to catalogue your own personal book collection, then I do recommend it! However, it’s a website for tracing the bibliographical details of books, and listing them in your own account. It’s **not** designed to index websites, journal articles or any of the other resources you may make use of. And it can’t be synchronised with your writing processes. If the book is in Library Thing, then it remains there, and the information can neither be exported nor reformatted into a preferred citation style.

# In Conclusion (slide 28)

In this presentation, I have talked about the importance of keeping track of your references right from the beginning of your research. We’ve thought about ways to make sure you will later be able to find information in your own notes. We’ve thought about different ways you can maintain a bibliography, and I’ve given some hints particularly about using Zotero, but the basic concepts are probably equally applicable to other bibliographical software that you may have access to. I’ve pointed out that there are different referencing styles; you’ll need to be guided by your supervisor or grad school about any particular system recommended by your university.

You’ll have worked out for yourself that bibliography is something I’m particularly enthusiastic about. I do realise that not everyone loves it with the same passion! However, it’s heartwarming that you’re all here today, and it’s evidence that you’ve realised it’s going to be important in your career as a scholar. Setting up a system now is the best way to remain organised – at least in this regard – in your future work.

Please don’t hesitate to seek a technical advisor at your own university, if you are anxious about embracing a new technology without a helping hand. There’s bound to be someone on the staff, and there will probably be others in your research community, who would be more than happy to help you.

Thank you.

1. *1 - Zotero Tutorial: Introduction*, dir. by McGill Library, 2019 <https://www.youtube.com/watch?v=M2wsGCqavPI> [accessed 13 June 2023]. [↑](#footnote-ref-1)