HOW TO DO RESEARCH IN LIBRARIES AND ARCHIVES

Presented by Stacey Duran, Public Services Librarian, Boston University Theology Library, © 2018.
What We’ll Cover Today…

▪ How to Do Research in Libraries and Archives
  ▪ Getting Started with Library Research
  ▪ Archival Research with Primary Sources

▪ How to Access Resources Beyond BU
  ▪ WorldCat Discovery, ILL, Consortial Cards, and More

▪ Managing ALL Your Research
  ▪ Organizing with Citation Managers & the Cloud
  ▪ Zotero as Example
GETTING STARTED WITH LIBRARY RESEARCH
IF YOU HAVE ALWAYS DONE IT THAT WAY, IT IS PROBABLY WRONG. – CHARLES KETTERING
Getting Started with Library Research

• Choose your area
  • People, Places, Things, Ideas

• Browse for potential topics
  • Issue or Thought or Practice or Problem

*OR*

• Choose your topic
  • Issue or Thought or Practice or Problem

• Narrow your area
  • People, Places, Things, Ideas
Research Spirals Down as You Whittle Down Your Topic...

Step 1
- Search BU Libraries Search
- Search Theology Databases
- Search Databases from Related Fields
- Search World Cat Discovery

Step 2
- Checkout Some Books
- Download Articles
- Request Any Unavailable Resources

Step 3
- Read everything
- Take Copious Notes

Step 4
- Formulate a Question, and Repeat.
… While Building the Foundations for Your Original Ideas.

Step 1: Search BU Libraries Search

Step 2: Checkout Some Books

Step 3: Read everything

Step 4: Formulate a Question, and Repeat.

- Download Articles
- Take Copious Notes
- Request Any Unavailable Resources

Search Theology Databases

Search Databases from Related Fields

Search World Cat Discovery
Research is *relational*, so books lead you to more books…

- Has this author written anything else?
- What is in the bibliography? What works helped build this author’s argument or topical knowledge?
- What else can be found under this subject heading?
- Are there any synonyms here that I can switch into my keyword searches?
- Is this author influenced by another field or subject? Would it enhance my research to bring those ideas in too?
THE MULTITUDE OF BOOKS IS MAKING US IGNORANT.
- VOLTAIRE
Choosing and Evaluating Your Resources – What do you use?

- **Author**
  - Who are they? What degrees do they hold? What university, professional association, or denominational affiliations do they have? What arguments or bias do their other works present? Who was their intended audience? Why did they write it?

- **Publisher**
  - Is it an Academic or Scholarly publisher? Small or large? Are their works peer-reviewed? Are they associated with a specific university, professional association, or denomination?

- **Date Published**
  - What religious, social, economic, political, or ecological issues were important at that time? Is this outdated? What changes in the field may have occurred since? Is this a foundational work for the field?
Evaluating Online Resources – What do you use?

- The resource itself
  - Where does the information or data come from? Are there citations? Is there information on how the data from the research or study was collected? Were standard procedures and protocols of the field followed? Do other scholars cite this resource? Are you the first?
  - *Can you find this information elsewhere in a more credible place or format?*

- The website hosting the resource
  - It is a scholarly website? Is it associated with a specific university, professional association, or denomination? What is the quality of the website?
  - Google it. Do other universities, authors, or scholars link to or cite this website.
ARCHIVAL RESEARCH WITH PRIMARY SOURCES
Getting Starting with Archival Research

• What are archives?
• Why do I need them?
• Where do I find them?
• How do I use them?
What are archives?

(also archive), n. 1. Materials created or received by a person, family, or organization, public or private, in the conduct of their affairs and preserved because of the enduring value contained in the information they contain or as evidence of the functions and responsibilities of their creator, especially those materials maintained using the principles of provenance, original order, and collective control; permanent records. 2. The division within an organization responsible for maintaining the organization’s records of enduring value. 3. An organization that collects the records of individuals, families, or other organizations; a collecting archives. 4. The professional discipline of administering such collections and organizations. 5. The building (or portion thereof) housing archival collections. 6. A published collection of scholarly papers, especially as a periodical.

Why do I need archives?

- Archives have **primary sources**.

- What are **primary sources**?

  **Primary Sources.** n. ~ Material that contains firsthand accounts of events and that was created contemporaneous to those events or later recalled by an eyewitness.

  Notes: Primary sources emphasize the lack of intermediaries between the thing or events being studied and reports of those things or events based on the belief that firsthand accounts are more accurate.

  - from the SAA’s 2005 Glossary of Archival and Records Terminology.

Fun facts: Manuscript collections are preserved in boxes and measured in linear feet.
Artifact boxes are measured in cubic feet.
Examples of Primary Sources in Archives

- Sermons, lectures, and speeches
- Memoirs and autobiographies
- Letters and correspondence
- Private diaries and journals
- Early or discarded drafts of later works
- Signed books or Bibles they owned (and possibly wrote in the margins of)
- Doodles, drawings, concept maps
- Photographs and scrapbooks
- Audio or video recordings of sermons, lectures, speeches, and interviews
- Other artifacts (aka: personal belongings or memorabilia)
  - Home video collections
  - Shoe collections
  - Stamp Collections
  - Chewed pencils or hair clippings… ok hopefully you won’t encounter these.
Why do I need archives?

This is sometimes as close as you will ever get to a person, organization, event, or historical time period…

…until we invent time travel.
Where do I find archives?

**Library Catalogs**
- Archives at major universities may often (but not always) be part of library websites or catalogs
- Some independent archives are cataloged like libraries in Worldcat.org

**Other Resources**
- National Union Catalog of Manuscripts Collections
- Other Digital Collections: Museums, Associations, Collaborative Websites
  **Examples:**
  - American Theol. Library Association
  - Making of America
    [http://quod.lib.umich.edu/m/moagrp/](http://quod.lib.umich.edu/m/moagrp/)
What should I do to plan my visit to the archives?

- Most archives charge a fee for any photocopying or scanning.
- While you can ask questions in advance, the archivist is **not** likely to spend hours (or years) researching among the archived items for you.
- In short, you probably need to plan a visit!
Planning Your Visit

Before you visit:

- Look up what materials they have that you would like to use.

- Contact the archives/archivist via email or telephone to let them know:
  - when you will be there
  - what you need to see
  - how many hours/days you plan to spend with the material
  - what your goal is – they may know the collection well enough to help you research more efficiently
  - **ASK** whether you can photograph, scan, or photocopy the materials while there.
  - **ASK** about permission to publish – some items are unpublishable per request of donor/copyright owner!

This stuff is complicated and takes work to set up!

Please give the archivist a few days or weeks to prepare, as they have other duties and visitors to attend to.
Planning Your Visit

Once you arrive you will likely need to:

▪ Register or sign-in as a visitor
▪ Review the archive’s policies
▪ Reference consultation with the archivist
  ▪ Restate what you’re looking for
  ▪ Decide where to start and what to focus on
  ▪ Find out if anything else in the archives could be related
  ▪ Check again about copies/scans/publishing rules.
How do I search the archives?

To find archival materials, archives may use catalogs... AND/OR databases, inventories, or finding aids.

For example, BU STH Library archival materials can be found both in the BU Libraries Search catalog and in our special Archon (an open source archival software program from the University of Illinois) website.
Examples of STH Library Archives in BU Libraries Search

**Records 1851-1982.**
Boston Street United Methodist Church (Lynn, Mass.); Boston Street Methodist Episcopal Church (Lynn, Mass.); Boston Street Methodist Church (Lynn, Mass.); 1851

*Available at* Theology Library CAH (CH-MA L8 B6)

**Focus**
Boston University. School of Theology.
Boston, Mass. : The School

*Available at* Theology Library Archives (ALUMNI PUBLICATIONS).
Examples of STH Library Archives in BU Libraries Search

Order of services at the installation of the Rev. David Fosdick, as minister of the Hollis Street Society: Boston, Tuesday March 3, 1846.
Hollis Street Society (Boston, Mass.); 1846
Boston, Mass. : Evening Gazette Press

Available at Theology Library Archives (STH F-10)

Hebrewisms of West Africa: from Nile to Niger with the Jews
Williams, Joseph J.; 1930
New York: L. MacVeagh, the Dial Press; Toronto: Longmans, Green & Co.

Available at Theology Library Research (01-00034922)
Examples of STH Library Archives in Archon

Search Results for "charles wesley" | Theology Library Archives

You searched for "charles wesley".

- **Records and Manuscripts** (9 Matches)
- **Subject Headings** (2 Matches)

11 Hits! Click the links to show each category’s results.
Examples of STH Library Archives in Archon

- **Records and Manuscripts** (9 Matches)

  - **Nutter, Charles S., 1879-1908**
    - Results Found Within Box List
      - Box 1: Charles Nutter Letters Collection → Folder 11: Photo Album
  - **Centers and Institutes - Anna Howard Shaw Center**
    - Results Found Within Box List
      - Box 5 → Folder 112: Worship Service Commemorating 250th Anniversary of Charles Wesley's Visit to Boston
  - **Morgan Memorial Inc.**
    - Results Found Within Box List
      - Box 14: Books and Printing Samples → Item 1: Books and printing samples, 1942-1993
  - **Houghton, James Russell, 1897-1981**
    - Results Found Within Box List
How may I use the archival materials?

- Bring the call numbers or identifying information from the catalog, database, inventory, or finding aid.

- Usually you will need to use a special reading room. Be prepared to take notes with pencil or on a computer, (NO PENS) and have any camera or scanning tools ready. You may be asked to wear soft cotton gloves to preserve the pages.

- You normally are not allowed to have food or drink near archival materials. Let the archivist know if you need to step out for a short while (food, bathroom, etc.) and come back.
HOW TO ACCESS RESOURCES BEYOND BU
PART I. INTERLIBRARY LOAN (ILL)
What is interlibrary loan (ILL)?

Libraries across the globe have lending and borrowing agreements with each other.

NEXT UP: Part III: Consortial Cards and Research Visits
WorldCat is a public database that combines billions of items at libraries all around the world into one easy-to-search catalog.
How to see available libraries in WorldCat.org

1. Enter your location (e.g., 02215) to find libraries.
2. Submit a complete postal address for best results.
3. Goto the list of libraries and select one with available copies.
Where to Request Interlibrary Loans

“For Students” Drop-Down Menu

Link to Request ILLs
Log-in to ILLiad.

Request Interlibrary Loans

Photo by Vernon Doucette of BU students studying on BU Beach

Click here to log into ILLiad

Introduction
Registering for ILLiad.

We only need to collect this information once to register you for ILL services. Having your e-mail and local mail address on file with Interlibrary Services enables us to notify you promptly and deliver materials accurately when your request arrives.

Boston University ID number: GLIB38149

If this is not your BU ID number, someone has previously authenticated in this browser. Please close your browser and start again. Thank you.

* First Name ___________________________

* Last Name ___________________________

* E-Mail Address ________________________

* Phone ________________________________

* Address Line 1 ________________________
   (40 characters maximum. Continue below if necessary)

Address Line 2 ________________________
   (40 characters maximum)

* City _________________________________
   (30 characters maximum)

* State _________________________________

* Zip Code ______________________________

Country _______________________________

USA

* Status ________________________________

Faculty, Staff, Graduate, Undergraduate student
Place an ILL Request.
…Finally, just wait for your ILL.

- Could be 1-2 weeks, with shipping.
- You’ll get an email!
PART II: CONSORTIAL BORROWING

BTI cards, BLC Cards, ATLA Reciprocal Borrowing, and more...
Opt-in to BTI borrowing through the BTI cross-registration portal. You only need to do this once!

Visit any BTI library on a **weekday from 9-5** to set up your visitor borrowing account.

Borrowing periods are 4 weeks.

BTI books can be returned to the STH Library circulation desk.
Boston Library Consortium (BLC) cards

- Request your BLC card online at: www.bu.edu/library/services/ill/blc-cards
- Pick up your BLC card from BU’s Mugar Memorial Library circulation desk (after one business day)
- Return books directly to the BLC library.

Some BLC Libraries:
- Boston College
- Brandeis University
- MIT
- Northeastern
- Tufts University
- Univ. of Connecticut
- Umass libraries
- University of New Hampshire
- Wellesley College
- Williams College

...and more!
ATLA Reciprocal Borrowing Program

American Theological Library Association (ATLA)

You must show your BU ID and proof of current registration (usually a course registration print-out, transcript, or letter from your school.)

Participating Libraries in:

Alabama, California, Colorado, Iowa, Illinois, Indiana, Kansas, Kentucky, Massachusetts, Michigan, Minnesota, Missouri, New Jersey, North Carolina, Ohio, Oklahoma, Oregon, Pennsylvania, Tennessee, Texas, Virginia, Washington, Canada

www.atla.com/Members/programs/Pages/Reciprocal-Borrowing-Initiative.aspx
Harvard’s Widener and Other Libraries

Even if a library is not affiliated with us, you may still be able to access materials!

• Many research libraries are open to the public – even non-circulating ones.

• Often public libraries and universities have borrowing privileges for local residents or visiting researchers.

• Call or ask at their circulation desk to find out if there is any way to view or borrow materials.

• Some may require a letter from our school (i.e. Harvard Widener), which you can get from BU’s Mugar Library at their reference desk.

• Long-term visiting researcher status may be acquired at a university – be prepared to explain your research.
MANAGING ALL YOUR RESEARCH
ORGANIZING WITH CITATION
MANAGERS & THE CLOUD
Citation Managers: What do they do?

- **Organize** your citations.

- **Import** citations from library catalogs, WorldCat.org (and BU WorldCat), databases, and even websites like Amazon or EBay.

- **Export** citations into bibliographies, following well-known style guides (Chicago, Turabian, MLA, APA, etc.)
What *else* can Citation Managers do?

- **Store files** attached to your citations (PDFs, word documents).
  
  e.g. Attach your article to its citation in Zotero, and then add a word document with your notes.

- **Keyword search across** thousands of cited sources AND stored files.
Paper files, floppy disks, USBs, and now… the CLOUD.

- Your research, anywhere you want it.
- Embedded tools to access your research directly within the software you use most.
- Worried about losing the password? Add a backup email or your link your phone number.
- Worried about losing your research? Save it to multiple clouds.
ZOTERO AS AN EXAMPLE
Streamlining with **Zotero**: Beginner.

**Importing.** Using your browser extensions, click on the book or article icon to send citation information into Zotero.

**Organize.** Make folders and add citations to folders.
- Folders work like tags; citations can be in multiple folders without duplicating citation.

**Exporting.** Use Zotero’s Word for Windows plug-in (already downloaded) to create footnotes/endnotes or export a bibliography.
Streamlining with **Zotero** : Intermediate.

- **Add PDFs** of any articles you cite directly into Zotero – drag and drop onto the citation from your download files.

- You have 300 MB free storage (unlimited is $10/mo.)

- Anytime you write a paper, create a Zotero folder and add the paper, all the citations you used in the paper, old drafts, your notes, feedback from mentors, even export emails related to it.
Streamlining with Zotero: Expert.

- If you use the library book scanners, you can make **word-searchable PDFs**.
- If the PDF you download from a database is not word-searchable, **Adobe Acrobat** (on the computer by the library's microfilm scanner) can transform the file with **OCR** (optical character recognition) so that it is.
- Bonus Hint: remember that you can **highlight and make notes on PDFs**, within the free Adobe reader - no need to print. Just resave with your changes, and upload the new copy into Zotero. Your highlighting and comments are saved for you for future papers!
Installing Zotero:

1. Register a free Zotero account.
2. Download Zotero.
3. Download at least one browser extension you like: Firefox, Chrome, Opera, and/or Safari.
4. Open Zotero and log-in to your account within the program.
5. Log-in to Zotero in each browser extension.
Zotero
Zotero Browser Extensions
Zotero with WorldCat
Zotero with the ATLA database
Zotero with Amazon and eBay
Zotero Free Storage: PDFs attached to citations
Zotero Storage

- 300 MB free
- Unlimited only $10/mo.
- Automatic renewals to keep from losing files.
- Credit or Paypal.
- Midyear upgrades prorated.

https://www.zotero.org/settings/purchasestorage
Microsoft Word Extension

- Automatically recognizes and downloads a word processor extension (Word or LibreOffice) as part of the initial Zotero download.
- In Word, creates a toolbar called “Zotero.”
Inserting a Footnote/Endnote, part 1

- Click on Add/Edit Citation.
- Choose your style
- Choose footnote or endnote
- Click “ok.”
Inserting a Footnote/Endnote, part 2

- Do a keyword search in the Zotero “quick format citation” to find your article.

- Click on the article information below (highlighted in blue) when it appears.

“This article examines the transnationalism of a Pentecostal Guatemalan-American young woman who is a second-generation immigrant.”

[Image of a Word document with Zotero citations and a footnote example]
Inserting a Footnote/Endnote, part 3

- Hit enter, and the red “quick format citation” disappears.

- Your citation will be saved and will appear in the footer.

“This article examines the transnationalism of a Pentecostal Guatemalan-American young woman who is a second-generation immigrant.”¹
Inserting a Bibliography.

- Move your cursor to a new line at the end of your paper.
- Click on Add/Edit Bibliography.
- A bibliography will automatically be inserted wherever your cursor was.
- The bibliography will include all footnotes and use the citation style you chose for each.
- Please write “Bibliography” above it and **format** the font to match your paper.

“...This article examines the transnationalism of a Pentecostal Guatemalan-American young woman who is a second-generation immigrant."

Final Tips: Zotero.

- If you are worried about accidentally saving PDFs without word-searchable content or want to keep track of highlighted articles, add something to the file name like _OCR or _HTD.

- You can easily export everything out of Zotero and back into RefWorks or Endnote if you don’t like Zotero’s free citation manager.

- The first half of the BU Call Number will import if you use our BU Libraries Search catalog; you can copy and paste the rest in if you think you will use the book a lot.
Thanks for coming!

For any questions or comments, please contact Stacey Duran at sbattles@bu.edu