Guidelines for preparing for your Preliminary Literature Review

You’ve been asked to do a preliminary literature review to get your team started on the term project. This assignment is individual; however, you must coordinate as a team to figure out what the project demands, what you know, and what you need to know—and you need to strategize for dealing with the unknown gaps that will inevitably arise as your work progresses. The following timeline will help ensure an effective process, both for your team and for each of you individually.

Prior to your Library Research Workshop (January 25 or 28):
The Research Planning Worksheets are to be used as a template and guide to help you work towards your final project. It is recommended that you upload each of the empty worksheets to Google Drive (or an equivalent) so that all team members have access to the worksheets in real time. The worksheets are there to help guide your work but they are intended to evolve with your project; you will add more rows as needed and you may find you want to add additional columns for other information you’d like to collect. The associated library research guide has links and information to help you with this process.

We have also demonstrated how to use the worksheets with a sample project: We’re looking at the use of whiteboards vs. digital displays for nursing stations.

- **Worksheet 1: What You Know and What You Need to Find Out** - This worksheet is to be completed by each individual. This will allow each team member to identify what they think are critical areas for the project. **NOTE: Any column that asks you to identify a team member, leave blank; you will decide this as a team during the workshop.**
  - **Identify key concepts associated with your project.** As your starting point, you may consider (and note this is by no means a comprehensive list):
    - Context of the project: your client and their main goals, the location of the project (and what that may mean in terms of standards, regulations, access, resources)
    - The types of analysis you’re being asked to do
    - The materials/products/processes you’re looking at
    - The nature of the recommendation(s) you’re being asked to make
  - **Identify what you know about/related to the concepts.** Consider where that knowledge comes from/how you obtained it—understanding that will help you with next steps. Make sure you note which team members have that knowledge and how you will share that information with each other.
  - **Identify what you need to find out about/related to the concepts.** Note that this may include specific information as well as how to find it.
  - **Given what you know and what you need to find out, develop an initial research plan for your team.** There is a range of things to consider, including (but not limited to):

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1 We’ve hyperlinked the MIE315 Library Guide, but you may also want to explore the whole of the Engineering & Computer Science Library web site which has resources—including other research guides—you may find useful beyond this course.
- How to divide up the responsibilities for who will do which parts of the information gathering
  - Division of responsibilities should be related to the knowledge and/or interests of individual team members
- How to collect and share what you know
- How to collect and share what you find out
- How to keep each other apprised—in real time—of your progress with your individual responsibilities
  - This part is critical. While you’ll each be looking at different concepts, your search strategies and findings may help your teammates in their own searches.

During the Library Research Workshop (January 25 or 28):
- **Worksheet 2: Brainstorming and Connecting Concepts**
  - **Brainstorm terms to increase the robustness of your search results.** Take the concepts you identified as a group in Worksheet 1 and brainstorm variations and related words/concepts that may also be relevant to the concept.
  - **Create your search query by using ANDs/ORs, brackets, phrases, and truncation.** Refer to the library research guide for more database tips.
- **Worksheet 3: Search and Results Tracking Worksheet** – Each individual needs to add their findings to this worksheet to create a group document.
  - **Save your results.** One option to simplify saving your search results is to use a [citation manager](#), e.g. Mendeley or Refworks.
  - **Revamp as needed.** As searching is an iterative process, you may find that you have to go back and create new searches based on the sources you find or the searches you run. This is standard procedure for any search.

After the Library Research Workshop:

**NOTE:** Worksheet 4 should be submitted as an Appendix to each individual’s Preliminary Literature Review.
- **Worksheet 4: Recording and Sharing Worksheet** – Each individual needs to add their findings to this worksheet to create a group document.
  - **Conduct your search.** Each team member must find three different sources related to your identified area. You can make use of strategies you’ve used in the past, but remember to look at the library research guide to help determine the best resources to answer the different types of questions you may have. **Do not forget to include notes on improving the search as you will need to find more sources later.**
  - **Record and make notes on the key points from your three chosen sources on the final worksheet.** These notes will form the basis for your summaries in the preliminary literature review.
  - **Record any questions you have for moving forward.** These questions and notes will also help you write part of your preliminary literature review.