

SOURCE ORGANIZATION SPREADSHEET

A comprehensive spreadsheet template for tracking and organizing research sources for your literature review and research paper.

MASTER SOURCE TRACKER

Instructions: Copy the table below into Excel, Google Sheets, or Numbers. Customize columns based on your needs.

COMPREHENSIVE VERSION (All Fields)

#	Status	Author(s)	Year	Title	Source Type	Publication	Volume/Issue	Pages
1	☐ Read				☐ Journal			
	☐ Cited				☐ Book			
	☐ Done				☐ Report			
	☐ Read				☐ Journal			
2	☐ Cited				☐ Book			
	☐ Done				☐ Report			
	☐ Read				☐ Journal			
	☐ Cited				☐ Book			
3	☐ Done				☐ Report			

SIMPLIFIED VERSION (Essential Fields Only)

#	Author	Year	Title	Type	Relevance	Priority	Theme	Key Finding	Status
1					☐ High ☐ Med ☐ Low	☐ Must ☐ Should ☐ Optional			☐ To Read ☐ Reading ☐ Read ☐ Cited
2					☐ High ☐ Med ☐ Low	☐ Must ☐ Should ☐ Optional			☐ To Read ☐ Reading ☐ Read ☐ Cited
3					☐ High ☐ Med ☐ Low	☐ Must ☐ Should ☐ Optional			☐ To Read ☐ Reading ☐ Read ☐ Cited
4					☐ High ☐ Med ☐ Low	☐ Must ☐ Should ☐ Optional			☐ To Read ☐ Reading ☐ Read ☐ Cited
5					☐ High ☐ Med ☐ Low	☐ Must ☐ Should ☐ Optional			☐ To Read ☐ Reading ☐ Read ☐ Cited

☐ COLUMN DEFINITIONS & USAGE GUIDE

Basic Information Columns

- Sequential number for each source (1, 2, 3...)

Author(s) - Last name, First initial format (Smith, J.)

Year - Publication year (2023)

Title - Full title of article/book

Source Type - Journal Article, Book, Book Chapter, Report, Thesis, Website, etc.

Publication - Journal name, publisher, or website name

Volume/Issue - Journal volume and issue numbers (e.g., 45(3))

Pages - Page range (e.g., 123-145)

DOI/URL - Digital Object Identifier or web address

Tracking Columns

Database - Where you found it (JSTOR, PubMed, Google Scholar, etc.)

Date Accessed - When you retrieved the source (MM/DD/YYYY)

File Location - Where PDF/document is saved

Status - Reading progress: - To Read - Currently Reading - Read (not yet cited) - Cited in Draft - Included in Final

Analysis Columns

Relevance - How relevant to your research: - High (essential) - Medium (supporting) - Low (background only)

Priority - Usage priority: - Must Use (critical for argument) - Should Use (strong support) - Optional (supplementary)

Theme/Topic - Main theme(s) this source addresses

Methodology - Research method used: - Quantitative - Qualitative - Mixed Methods - Literature Review - Case Study - Experimental

Sample Size - Number of participants/data points (if applicable)

Key Findings - 1-2 sentence summary of main results

Supports/Contradicts - Relationship to your argument: - Supports (agrees with your thesis) - Contradicts (opposes your thesis) - Neutral (provides background) - Mixed (some of both)

Usage Tracking Columns

Used In Section - Where you'll cite this source: - Introduction - Literature Review - Theoretical Framework - Methodology - Results/Discussion - Conclusion - Multiple Sections

Page Used - Page number(s) in YOUR paper where source is cited

Full Citation - Complete APA/MLA/Chicago citation

Notes - Additional comments, questions, or reminders

☐ COLOR-CODING SYSTEM

Suggested Cell Color Meanings:

- ☐ **GREEN** = High priority, must use
- ☐ **YELLOW** = Medium priority, should use
- ☐ **ORANGE** = Low priority, optional
- ☐ **RED** = Needs follow-up or has issues
- ☐ **BLUE** = Read and cited in draft
- ☐ **PURPLE** = Seminal/foundational work
- ☐ **WHITE** = Not yet reviewed
- ☐ **GRAY** = Rejected/not using

How to Apply: 1. Select cell or row 2. Apply background color 3. Use consistently across your spreadsheet

☐ THEMATIC SOURCE ORGANIZATION

Group sources by research themes for easier synthesis:

THEME 1: _____

Author	Year	Key Contribution	Agreement Level	Priority
			☐ Strongly Supports	☐ High ☐
			☐ Supports ☐ Neutral	Med ☐
			☐ Contradicts	Low
			☐ Strongly Supports	☐ High ☐
			☐ Supports ☐ Neutral	Med ☐
			☐ Contradicts	Low
			☐ Strongly Supports	☐ High ☐
			☐ Supports ☐ Neutral	Med ☐
			☐ Contradicts	Low

Theme Summary/Synthesis:

Research Gap Identified:

THEME 2:

Author	Year	Key Contribution	Agreement Level	Priority
			☐ Strongly Supports	☐ High ☐
			☐ Supports ☐ Neutral	Med ☐
			☐ Contradicts	Low
			☐ Strongly Supports	☐ High ☐
			☐ Supports ☐ Neutral	Med ☐
			☐ Contradicts	Low
			☐ Strongly Supports	☐ High ☐
			☐ Supports ☐ Neutral	Med ☐
			☐ Contradicts	Low

Theme Summary/Synthesis:

Research Gap Identified:

THEME 3:

Author	Year	Key Contribution	Agreement Level	Priority
			☐ Strongly Supports	☐ High ☐
			☐ Supports ☐ Neutral	Med ☐
			☐ Contradicts	Low
			☐ Strongly Supports	☐ High ☐
			☐ Supports ☐ Neutral	Med ☐
			☐ Contradicts	Low
			☐ Strongly Supports	☐ High ☐
			☐ Supports ☐ Neutral	Med ☐
			☐ Contradicts	Low

Theme Summary/Synthesis:

Research Gap Identified:

☐ RESEARCH PROGRESS TRACKER

Track your overall research progress:

Overall Statistics

Metric	Target	Current	% Complete
Total Sources Needed	_____	_____	_____ %
Sources Found	_____	_____	_____ %
Sources Read	_____	_____	_____ %
Sources Analyzed	_____	_____	_____ %
Sources Cited in Draft	_____	_____	_____ %
High Priority Sources	_____	_____	_____ %

Source Type Distribution

Source Type	Target Count	Current Count	Still Needed
Peer-Reviewed Journals	_____	_____	_____
Books	_____	_____	_____
Book Chapters	_____	_____	_____
Reports/White Papers	_____	_____	_____
Dissertations/Theses	_____	_____	_____
Conference Papers	_____	_____	_____
TOTAL	_____	_____	_____

Timeline Checkpoints

Date	Milestone	Status
_____	Complete preliminary search	☐
_____	Gather 20 sources	☐
_____	Read all sources	☐
_____	Complete synthesis notes	☐
_____	First draft literature review	☐
_____	Final draft complete	☐

☐ METHODOLOGY COMPARISON TABLE

Compare methodological approaches across sources:

Author (Year)	Research Design	Sample Size	Data Collection	Analysis Method	Strengths	Limitations	F
	☐ Experimental ☐ Survey ☐ Qualitative ☐ Case Study						
	☐ Experimental ☐ Survey ☐ Qualitative ☐ Case Study						
	☐ Experimental ☐ Survey ☐ Qualitative ☐ Case Study						

☐ CITATION QUALITY CHECKLIST

Evaluate source credibility:

Source #	Peer-Reviewed?	Recent (< 10 yrs)?	Relevant?	Credible Author?	Sufficient Detail?	Quality Score
1	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	___/5
2	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	___/5
3	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	___/5

Quality Standards: - **5/5** = Excellent, must use - **4/5** = Strong, should use - **3/5** = Acceptable, may use - **2/5** = Weak, reconsider - **1/5** = Poor, do not use

☐ WEEKLY RESEARCH LOG

Track research activities week by week:

WEEK 1: // ___ to // ___

Day	Activity	Sources Found	Sources Read	Hours Spent	Notes
Mon					
Tue					
Wed					
Thu					
Fri					
Sat					
Sun					
Total		_____	_____	_____	

Week's Accomplishments:

Next Week's Goals:

WEEK 2: //__ to //__

Day	Activity	Sources Found	Sources Read	Hours Spent	Notes
Mon					
Tue					
Wed					
Thu					
Fri					
Sat					
Sun					
Total		_____	_____	_____	

☐ SEARCH STRATEGY TRACKER

Document your search strategies for reproducibility:

Database Search Log

Database	Date	Search Terms	Filters Applied	Results Found	Relevant Sources	Notes
Google Scholar			☐ Year: _____ ☐ Type: _____			
JSTOR			☐ Year: _____ ☐ Type: _____			
PubMed			☐ Year: _____ ☐ Type: _____			
EBSCOhost			☐ Year: _____ ☐ Type: _____			
ProQuest			☐ Year: _____ ☐ Type: _____			

Keyword Combinations Used

Primary Keywords	Secondary Keywords	Boolean Operators	Results	Useful?
		AND / OR / NOT		☐ Yes ☐ No
		AND / OR / NOT		☐ Yes ☐ No
		AND / OR / NOT		☐ Yes ☐ No

☐ REFERENCE LIST BUILDER

Pre-formatted citation entries (add as you go):

APA Format

1. _____
2. _____
3. _____
4. _____
5. _____

MLA Format

1. _____
2. _____
3. _____

Chicago Format

1. _____
2. _____
3. _____

Total References: _____

☐ FILE ORGANIZATION SYSTEM

Folder Structure

```
My_Research_Project/
├── 01_Source_PDFs/
│   ├── High_Priority/
│   ├── Medium_Priority/
│   └── Low_Priority/
├── 02_Notes/
│   ├── Source_Notes/
│   └── Synthesis_Notes/
├── 03_Spreadsheets/
│   ├── Master_Source_Tracker.xlsx
│   ├── Thematic_Organization.xlsx
│   └── Citation_List.xlsx
├── 04_Drafts/
│   ├── Lit_Review_Draft_1.docx
│   ├── Lit_Review_Draft_2.docx
│   └── Final_Draft.docx
└── 05_Final/
    └── Final_Submission.docx
```

File Naming Convention

Format: AuthorLastName_Year_ShortKeyword.pdf

Examples: - Smith_2023_ClimateChange.pdf - Johnson_2022_SocialMedia.pdf - Chen_2024_MachineLearning.pdf

☐ DAILY RESEARCH CHECKLIST

Morning (Planning): - ☐ Review today's research goals - ☐ Update spreadsheet with yesterday's progress - ☐ Identify 2-3 sources to read today - ☐ Check for new publications in your field

During Research: - ☐ Take detailed notes for each source - ☐ Add source to spreadsheet immediately after reading - ☐ Highlight key quotes with page numbers - ☐ Note connections to other sources

Evening (Review): - ☐ Update spreadsheet with today's progress - ☐ Back up files to cloud storage - ☐ Review synthesis notes - ☐ Plan tomorrow's research goals

☐ GOOGLE SHEETS FORMULAS (Optional Advanced Features)

Automatic Progress Calculation:

=COUNTIF(Status_Column,"Read")/COUNTA(Status_Column)

Priority Count:

=COUNTIF(Priority_Column,"Must Use")

Sources by Theme:

=COUNTIF(Theme_Column,"Theme Name")

Average Quality Score:

=AVERAGE(Quality_Score_Column)

☐ TIPS FOR EFFECTIVE SPREADSHEET USE

✓ **DO:** - Update spreadsheet IMMEDIATELY after reading a source - Use consistent formatting and abbreviations - Sort by different columns to see patterns - Create separate sheets for different themes - Back up regularly to cloud storage - Use filters to view specific subsets

✗ **DON'T:** - Wait until end to update (you'll forget details) - Use inconsistent categories or tags - Overcomplicate with too many columns - Forget to include page numbers for quotes - Skip the citation column (fill it out now!)

☐ MAINTENANCE SCHEDULE

Daily: - Add new sources found - Update reading status - Log time spent

Weekly: - Review and update priorities - Check progress toward goals - Identify gaps in coverage - Sort by theme to see patterns

Bi-Weekly: - Clean up duplicate entries - Verify all citations are complete - Update file locations if moved - Review thematic organization

Monthly: - Evaluate overall progress - Adjust research strategy if needed - Archive completed sections - Celebrate milestones!

☐ MOBILE-FRIENDLY VERSION

For on-the-go research tracking:

#	Author	Year	Title	Status	Priority
1				☐ To Read ☐ Read	☐ High ☐ Low
2				☐ To Read ☐ Read	☐ High ☐ Low
3				☐ To Read ☐ Read	☐ High ☐ Low

Template Version: 1.0

Last Updated: 2025

Format: Compatible with Excel, Google Sheets, Numbers, LibreOffice Calc

© Source Organization Spreadsheet - For Academic Research Use

☐ GETTING STARTED

Step 1: Copy this template to Excel/Google Sheets

Step 2: Choose Comprehensive or Simplified version

Step 3: Customize columns for your needs

Step 4: Start adding sources as you find them

Step 5: Update regularly (daily is best!)

Pro Tip: Start with the Simplified Version and add columns as needed. Don't over-engineer at the beginning!

Need Help? Consult your university librarian for database search training and citation management software recommendations (Zotero, Mendeley, EndNote).

Happy Researching! ☐ ☐