

New Researcher Handbook

A Practical Guide for Early-Career PhD Students and Researchers

Xiaolong Luo

Harvard University

School of Engineering and Applied Sciences

Also available on: [Xiaohongshu \(小红书\)](#)

August 26, 2025

Contents

| | | |
|----------|--------------------------------------------------|----------|
| 1 | Introduction | 3 |
| 1.1 | Why This Manual Matters | 3 |
| 1.2 | How We Build Research Excellence | 4 |
| 2 | Core Principles | 4 |
| 2.1 | Clarity Above All | 4 |
| 2.2 | Consistency Matters | 4 |
| 2.3 | Respect Your Audience | 4 |
| 3 | Presentation Standards | 4 |
| 3.1 | Structure | 4 |
| 3.2 | Slide Design Guidelines | 5 |
| 4 | Experimental Results Presentation | 5 |
| 4.1 | Experimental Setup Checklist | 5 |
| 4.2 | Figure Guidelines | 5 |
| 4.2.1 | Essential Elements | 5 |
| 4.2.2 | Scientific Color Schemes | 6 |
| 5 | Research Habits for CS & AI | 6 |
| 5.1 | Daily Practices | 6 |
| 5.1.1 | Code and Experiment Management | 6 |
| 5.1.2 | Time Management | 6 |
| 5.2 | Research Methodology | 7 |
| 5.2.1 | Literature Review | 7 |
| 5.2.2 | Experiment Design | 7 |
| 5.3 | Collaboration Best Practices | 7 |
| 5.3.1 | Communication | 7 |
| 5.3.2 | Code Collaboration | 7 |
| 5.3.3 | Active Participation in Group Meetings | 8 |
| 5.4 | Professional Development | 8 |
| 5.4.1 | Skills to Develop | 8 |

| | | |
|----------|-------------------------------------------------------------------|-----------|
| 6 | Report Writing Standards | 8 |
| 6.1 | Structure | 8 |
| 6.2 | Common Mistakes to Avoid | 9 |
| 7 | Weekly Update Format | 10 |
| 7.1 | Structure | 10 |
| 7.2 | Best Practices | 10 |
| 8 | How to be a Productive PhD Student | 11 |
| 8.1 | Strategic Research Framework | 11 |
| 8.1.1 | Clear Goals and Structured Output Paths | 11 |
| 8.1.2 | Daily Action System | 11 |
| 8.2 | Top Conferences by Field | 12 |
| 8.2.1 | AI/Machine Learning Conferences | 12 |
| 8.2.2 | Computer Science Conferences | 13 |
| 8.2.3 | AI for Science Conferences and Venues | 13 |
| 8.3 | Publication Strategy | 14 |
| 8.3.1 | Conference Timeline Management | 14 |
| 8.3.2 | Quality vs. Quantity Balance | 14 |
| 8.3.3 | Collaboration Guidelines | 14 |
| 8.3.4 | Technical Paper Planning: Key Points to Think Through | 14 |
| 8.3.5 | Writing Effective Survey/Review Papers | 16 |
| 8.4 | Productivity Systems and Tools | 18 |
| 8.4.1 | Research Pipeline Management | 18 |
| 8.4.2 | Time Management Strategies | 18 |
| 8.4.3 | Mental Health and Sustainability | 19 |
| 8.5 | Academic Social Networking | 19 |
| 8.5.1 | Building Your Research Network | 19 |
| 8.5.2 | Online Presence | 20 |
| 8.5.3 | Building Your Academic Website | 21 |
| 8.6 | Essential Reading for PhD Students | 22 |
| 8.6.1 | Core PhD Experience | 22 |
| 8.6.2 | Career and Professional Development | 22 |
| 8.6.3 | Online Resources and Blogs | 23 |
| A | Presentation Checklist | 24 |
| B | Figure Checklist | 24 |
| C | Research Tools and Resources | 24 |
| C.1 | Recommended Software | 24 |
| C.2 | Terminal Setup Recommendation | 25 |
| C.3 | Visualization and Diagramming Tools | 25 |
| C.3.1 | Excalidraw | 25 |
| C.3.2 | PlotNeuralNet | 26 |
| C.4 | System Resource Monitoring and Performance Optimization | 26 |
| C.4.1 | System Resource Monitoring | 26 |
| C.4.2 | Parallel Processing for Efficiency | 27 |
| C.4.3 | Best Practices and Monitoring Guidelines | 27 |

1 Introduction

1.1 Why This Manual Matters

Dear students,

I wish I had seen this manual when I was an undergraduate student, or when I just started my PhD journey. It would have saved me from countless detours, mistakes, and unnecessary struggles. This guide contains the lessons I learned the hard way—through trial and error, late-night debugging sessions, rejected papers, and awkward presentations.

Looking back, I realize how much time and energy I could have saved if someone had told me:

- The importance of version control (I lost weeks of work because I didn't use Git properly)
- How to structure presentations (my first conference talk was a disaster—no clear message, too much detail)
- The value of documentation (I couldn't understand my own code from 6 months earlier)
- How to ask good questions in meetings (I stayed silent for months, missing valuable learning opportunities)

These aren't just rules—they're shortcuts to success that I discovered too late:

- Clear communication skills will help you share your ideas effectively
- Rigorous research habits will make you a trusted and reliable researcher
- Professional presentation skills will open doors to opportunities
- Good documentation practices will save you countless hours in the future
- Collaborative skills will make you a valued team member anywhere you go

As a PhD candidate in my fourth year, I'm still learning these lessons myself. Every guideline in this manual comes from mistakes I've made or witnessed firsthand. When I emphasize the importance of presentation skills, it's because I've missed many opportunities and left poor impressions due to bad presentations. When I emphasize documentation, it's because I've personally struggled to recreate my own experiments from months earlier.

The habits we develop now will serve us when we're:

- Presenting at international conferences (where we have one shot to impress)
- Defending our theses (where clarity can make or break the defense)
- Interviewing for our dream jobs (where these skills set us apart)
- Eventually leading our own research teams (where we'll pass on these lessons)
- Pitching ideas to investors or stakeholders (where professionalism matters most)

My intention is simple: By sharing what I've learned so far in my PhD journey, I hope we can learn from each other's experiences. This manual isn't written from a position of mastery—it's a collection of lessons I'm still learning, mistakes I'm still making, and habits I'm still building. Let's navigate this journey together and help each other become the researchers we aspire to be.

1.2 How We Build Research Excellence

Beyond the technical skills, remember that excellence in research comes from:

- **Frequent feedback from each other:** Don't work in isolation—share your work early and often
- **Reflecting on our personal and research practices:** Take time to think about what's working and what isn't
- **Getting enough sleep so we can bring our best selves to our work:** Exhausted researchers make poor decisions and write buggy code

These principles might sound simple, but I've seen too many brilliant students burn out because they ignored them. Your best work comes when you're well-rested, connected with your community, and continuously learning from both successes and failures.

2 Core Principles

2.1 Clarity Above All

Every presentation should prioritize clarity. Your audience should understand:

- The problem you're solving
- Your approach
- Your results and their implications

2.2 Consistency Matters

Use consistent formatting, terminology, and structure throughout your presentations and reports.

2.3 Respect Your Audience

Remember that your audience's time is valuable. Be prepared, be concise, and be engaging.

3 Presentation Standards

3.1 Structure

Every presentation should follow this structure:

1. **Title Slide:** Include title, your name, date, and affiliation
2. **Outline:** Brief overview of what you'll cover
3. **Background/Motivation:** Why this work matters
4. **Problem Statement:** Clear definition of what you're solving
5. **Methodology:** Your approach
6. **Results:** What you found
7. **Discussion:** What it means
8. **Future Work:** Next steps
9. **Acknowledgments:** Credit collaborators and funding

3.2 Slide Design Guidelines

- **6×6 Rule:** Maximum 6 bullet points with 6 words each
- **Font Size:** Minimum 24pt for body text, 32pt for titles
- **Color Scheme:** Use high contrast; avoid red-green combinations
- **One Message Per Slide:** Each slide should convey one main idea

4 Experimental Results Presentation

Critical Requirements

Before presenting ANY experimental results:

1. Clearly explain the experimental setting
2. Define all variables and parameters
3. State your hypotheses explicitly

Before showing ANY figure:

1. Explain what the figure shows
2. Describe the X and Y axes clearly
3. Read the caption aloud
4. Point out key trends or findings

4.1 Experimental Setup Checklist

When presenting experiments, always include:

- **Dataset:** Size, source, preprocessing steps
- **Baselines:** What you're comparing against
- **Metrics:** How you measure success
- **Hyperparameters:** All relevant settings
- **Statistical Significance:** Error bars, p-values when applicable

4.2 Figure Guidelines

4.2.1 Essential Elements

Every figure MUST have:

- Clear, descriptive title and Labeled axes with units
- Legend (if multiple data series)
- Caption explaining what's shown
- Appropriate scale and range

- Use vector graphics (PDF, SVG) when possible
- Include error bars or confidence intervals

4.2.2 Scientific Color Schemes



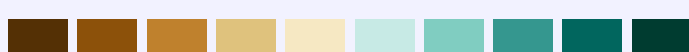
Professional Color Palettes

Recommended Scientific Color Schemes:

1. Sequential (Single Hue): For ordered data

- **Blues:** 
- **Viridis:** 
- **Cividis:** 

2. Diverging: For data with meaningful midpoint

- **RdBu (Red-Blue):** 
- **PuOr (Purple-Orange):** 
- **BrBG (Brown-Green):** 

3. Categorical: For discrete categories

- **Set1:** 
- **Okabe-Ito (Colorblind-safe):** 
- **Dark2:** 

Color Selection Resource:

- [Best Color Palettes for Scientific Figures and Data Visualizations](#) - Comprehensive guide for scientific color selection

5 Research Habits for CS & AI

5.1 Daily Practices

5.1.1 Code and Experiment Management

- **Version Control:** Commit code daily with meaningful messages
- **Documentation:** Document code as you write it, not after
- **Reproducibility:** Always set random seeds and log all parameters
- **Backup:** Use git and cloud storage; never trust a single copy

5.1.2 Time Management

- **Deep Work Blocks:** Reserve 2-4 hour blocks for focused research
- **Experimentation:** Run experiments overnight/weekends when possible
- **Writing:** Write a little every day, even just notes

5.2 Research Methodology

5.2.1 Literature Review

- **Systematic Search:** Use Google Scholar, arXiv, and conference proceedings
- **Latest Papers Hub:** [Hugging Face Papers](#) - Excellent source for discovering the latest high-quality ML papers with community discussions
- **Quality Assessment:** When selecting papers, always note:
 - **Institution:** Which university or research lab produced the work
 - **Publication Year:** How recent is the research (prioritize recent work for current trends)
 - **Venue:** Where was it published (top-tier conferences/journals have rigorous peer review)
 - **Impact:** Citation count and influence in the field
- **Prioritize High-Quality Sources:**
 - Top conferences: NeurIPS, ICML, ICLR, ACL, CVPR, AAAI, IJCAI
 - Top journals: Nature, Science, JMLR, IEEE TPAMI, TACL
 - Reputable institutions with strong track records in your area
- **Note-Taking:** Summarize key ideas, methods, and limitations
- **Stay Current:** Follow top conferences (NeurIPS, ICML, ACL, CVPR, etc.)

5.2.2 Experiment Design

- **Start Simple:** Begin with baseline implementations
- **One Variable:** Change one thing at a time
- **Hypothesis-Driven:** Always have a clear hypothesis before running
- **Negative Results:** Document what doesn't work—it's valuable!

5.3 Collaboration Best Practices

5.3.1 Communication

- **Regular Updates:** Weekly progress reports to advisor
- **Ask Questions Early:** Don't struggle alone for days
- **Share Drafts:** Get feedback on writing early and often
- **Meeting Prep:** Come with agenda and specific questions

5.3.2 Code Collaboration

- **Code Reviews:** Request reviews for significant changes
- **Documentation:** Write README files for every project
- **Modular Design:** Write reusable, testable code
- **Shared Standards:** Follow team coding conventions

5.3.3 Active Participation in Group Meetings

Why Active Participation Matters

Asking questions in group meetings is not just encouraged—it's essential for your growth as a researcher. Here's why:

Benefits for You:

- **Deeper Understanding:** Questions help clarify concepts you might have misunderstood
- **Build Connections:** Your questions can spark collaborations and discussions
- **Develop Critical Thinking:** Learning to ask good questions is a crucial research skill
- **Show Engagement:** Active participation demonstrates your interest and commitment
- **Learn from Others:** Often, your peers have the same questions but hesitate to ask
- **Practice Communication:** Formulating clear questions improves your ability to communicate research ideas

Common Types of Questions to Ask:

5.4 Professional Development

5.4.1 Skills to Develop

- **Programming:** Python, PyTorch/TensorFlow, Git
- **Mathematics:** Linear algebra, probability, optimization
- **Writing:** Technical writing, LaTeX
- **Presentation:** Public speaking, visualization

6 Report Writing Standards

6.1 Structure

Follow the standard scientific paper structure:

1. Abstract (150-250 words)
2. Introduction
3. Related Work
4. Methodology
5. Experiments
6. Results and Discussion
7. Conclusion
8. References

| Question Type | Example Questions |
|-----------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Clarification Questions | <ul style="list-style-type: none"> • "Could you explain what you mean by [technical term]?" • "How does this differ from [related concept]?" • "Can you walk through that derivation/algorithm again?" |
| Methodology Questions | <ul style="list-style-type: none"> • "Why did you choose this particular approach?" • "Have you considered [alternative method]?" • "How did you handle [specific challenge]?" • "What are the computational requirements?" |
| Results and Interpretation | <ul style="list-style-type: none"> • "What's the statistical significance of these results?" • "How do these results compare to the baseline?" • "What do you think explains this unexpected outcome?" • "Have you tested this on [different dataset/scenario]?" |
| Broader Impact Questions | <ul style="list-style-type: none"> • "How does this relate to [other work in the field]?" • "What are the practical applications of this research?" • "What are the limitations of this approach?" • "What ethical considerations should we keep in mind?" |
| Future Work Questions | <ul style="list-style-type: none"> • "What are the next steps for this project?" • "How could this be extended to [related problem]?" • "What would you do differently if starting over?" • "What's the biggest challenge you foresee?" |

Table 1: Common types of questions to ask during group meetings

6.2 Common Mistakes to Avoid

Don't Do This!

1. **Wall of Text:** Never fill slides with paragraphs
2. **Unclear Axes:** Always label axes before discussing graphs
3. **Missing Context:** Never jump to results without setup
4. **Unreadable Fonts:** Test visibility from the back of the room
5. **No Rehearsal:** Always practice your timing
6. **Ignoring Questions:** Listen carefully and answer what was asked

7 Weekly Update Format

7.1 Structure

Your weekly updates should include:

1. **Progress:** What you accomplished
2. **Challenges:** What difficulties you encountered
3. **Plans:** What you'll do next week
4. **Questions:** What help you need

7.2 Best Practices

- Keep updates concise (5-10 slides)
- Include visual evidence of progress
- Be honest about challenges
- Come prepared with specific questions

8 How to be a Productive PhD Student

8.1 Strategic Research Framework

The Foundation of PhD Success

Becoming a productive PhD student requires more than just hard work—it demands strategic thinking, systematic organization, and deliberate practice. This section synthesizes best practices from successful researchers worldwide.

8.1.1 Clear Goals and Structured Output Paths

Define Your North Star:

- **Long-term Vision:** What impact do you want to make in your field?
- **3-Year Plan:** Break down your PhD into yearly milestones
- **Quarterly Goals:** Concrete deliverables (papers, code, experiments)
- **Weekly Targets:** Specific tasks that move you toward quarterly goals

Output-Driven Approach:

1. **Papers:** Target 2-3 quality publications per year
2. **Code:** Build reusable research tools and frameworks
3. **Presentations:** Regular practice at lab meetings and conferences
4. **Collaborations:** Actively engage in 1-2 collaborative projects

8.1.2 Daily Action System

The PhD Daily Routine

Morning (Deep Work Block):

- 2-4 hours of uninterrupted research/coding
- No email, no meetings, no distractions
- Focus on your most important task

Afternoon (Collaborative Work):

- Meetings, discussions, code reviews
- Email and administrative tasks
- Reading papers and staying current

Evening (Reflection and Planning):

- Document daily progress in research log
- Plan next day's priorities
- Light reading or skill development

Notion-Based Management System:

- **Research Dashboard:** Track all projects, deadlines, and progress
- **Literature Database:** Organize papers with tags, notes, and connections
- **Experiment Log:** Document all experiments with parameters and results
- **Idea Capture:** Quick notes for research ideas and insights
- **Weekly Reviews:** Reflect on progress and adjust plans

8.2 Top Conferences by Field**8.2.1 AI/Machine Learning Conferences**

| Conference | Full Name | Focus Area | Website |
|---------------------------------------|------------------------------------------------------|---------------|------------------|
| Core Machine Learning (Tier 1) | | | |
| NeurIPS | Neural Information Processing Systems | General ML | neurips.cc |
| ICML | International Conference on Machine Learning | ML Theory | icml.cc |
| ICLR | International Conference on Learning Representations | Deep Learning | iclr.cc |
| Computer Vision | | | |
| CVPR | Computer Vision and Pattern Recognition | Vision | cvpr.thecvf.com |
| ICCV | International Conference on Computer Vision | Vision | thecvf.com |
| ECCV | European Conference on Computer Vision | Vision | eccv.ecva.net |
| Natural Language Processing | | | |
| ACL | Association for Computational Linguistics | NLP | aclanthology.org |
| EMNLP | Empirical Methods in NLP | NLP | emnlp.org |
| NAACL | North American Chapter of ACL | NLP | naacl.org |
| General AI | | | |
| AAAI | Association for Advancement of AI | General AI | aaai.org |
| IJCAI | International Joint Conference on AI | General AI | ijcai.org |
| Data Mining and Web | | | |
| KDD | Knowledge Discovery and Data Mining | Data Mining | kdd.org |
| WWW | The Web Conference | Web/IR | thewebconf.org |

Table 2: Top-tier AI/ML conferences with submission deadlines typically 4-6 months before the conference

8.2.2 Computer Science Conferences

| Conference | Full Name | Area | Website |
|-----------------------------------|------------------------------------------------|-----------|-----------------------------------|
| Databases | | | |
| SIGMOD | Special Interest Group on Management of Data | Databases | sigmod.org |
| VLDB | Very Large Data Bases | Databases | vldb.org |
| Systems | | | |
| OSDI | Operating Systems Design and Implementation | Systems | usenix.org |
| SOSP | Symposium on Operating Systems Principles | Systems | sosp.org |
| Graphics | | | |
| SIGGRAPH | Special Interest Group on Graphics | Graphics | siggraph.org |
| Human-Computer Interaction | | | |
| CHI | Conference on Human Factors in Computing | HCI | chi.acm.org |
| UIST | User Interface Software and Technology | HCI | uist.acm.org |
| Security | | | |
| S&P | IEEE Symposium on Security and Privacy | Security | ieee-security.org |
| CCS | Computer and Communications Security | Security | sigsac.org |
| USENIX | USENIX Security Symposium | Security | usenix.org |
| Programming Languages | | | |
| PLDI | Programming Language Design and Implementation | PL | pldi.sigplan.org |
| POPL | Principles of Programming Languages | PL | popl.mpi-sws.org |

Table 3: Top-tier Computer Science conferences across different research areas

8.2.3 AI for Science Conferences and Venues

The Rising Field of AI4Science

AI for Science is an emerging interdisciplinary field where machine learning meets traditional sciences. These venues offer unique opportunities to publish work that bridges AI and scientific domains.

| Venue | Type | Website/Info |
|---------------------------------------------|------------------------------|-----------------------------------------------|
| Workshops at Major ML Conferences | | |
| AI4Science @ NeurIPS | Workshop | ai4sciencecommunity.github.io |
| AI4Science @ ICLR | Workshop | ai4sciencecommunity.github.io |
| AI4Science @ ICML | Workshop | ai4sciencecommunity.github.io |
| ML4Physical Sciences @ NeurIPS | Workshop | Annual at NeurIPS |
| Computational Biology @ ICML | Workshop | Annual at ICML |
| Journals | | |
| Nature Machine Intelligence | Journal | nature.com/natmachintell |
| Science Robotics | Journal | science.org |
| Digital Discovery | Journal | RSC Publishing |
| npj Computational Materials | Journal | nature.com |
| Physical Review X | Journal | aps.org |
| Specialized Conferences | | |
| MLCB | Machine Learning in Comp Bio | mlsb.io |
| ISMB/ECCB | Bioinformatics | iscb.org |
| AIChE | Chemical Engineering + AI | aiche.org |

Table 4: AI for Science publication venues combining machine learning with scientific disciplines

8.3 Publication Strategy

8.3.1 Conference Timeline Management

Critical: Plan Your Submissions 6 Months Ahead

Most top conferences have deadlines 5-6 months before the conference date. Missing a deadline means waiting a full year for the next opportunity!

Typical Timeline for a Paper Submission:

- **T-6 months:** Start experiments and writing
- **T-3 months:** Complete main experiments
- **T-1 month:** Finish first draft, get feedback
- **T-1 week:** Polish, proofread, prepare supplementary
- **T-0:** Submit and celebrate!

8.3.2 Quality vs. Quantity Balance

The Publication Pyramid:

1. **Flagship Paper** (1 per year): Your best work targeting top venues (NeurIPS, ICML, CVPR)
2. **Solid Contributions** (1-2 per year): Good work at specialized conferences
3. **Workshop Papers** (2-3 per year): Early-stage ideas, work-in-progress

8.3.3 Collaboration Guidelines

Authorship Best Practices:

- **First Author:** Lead the project, write majority of paper
- **Contributing Author:** Significant experiments or sections
- **Advisory Author:** Guidance and feedback
- Always discuss authorship order early in the project
- Document contributions for each paper

8.3.4 Technical Paper Planning: Key Points to Think Through

Before You Start Writing a Technical Paper

A successful technical paper isn't just about good results—it's about clear thinking. Before writing a single word, ensure you can answer these strategic questions about your work.

I. Paper Core Elements

1. Main Contribution:

- What is my core innovation? Is it theoretical innovation, algorithm design, system optimization, application scenario, or analysis/unification of existing methods?

- Can I explain in one sentence: "We are the first to solve X important problem"?
- Do I have multi-level contributions? (theory + practice; new method + new task; new analysis + new benchmark)

2. Results Presentation Strategy:

- Which experiments are **must-have** core comparisons?
- Which are **supporting** ablation studies / case studies / visualizations?
- Do I need multiple benchmarks (across vision/NLP) to show generality?
- Can I achieve SOTA with fewer resources or higher efficiency, or significantly outperform on specific data/tasks?

II. Pre-Writing Strategic Questions

1. Topic Positioning:

- Is my topic hot at this conference this year? Is it oversaturated?
- Does it align with emerging trends? (e.g., "Multimodal LLM", "efficient finetuning", "long context modeling", "AI4Science")
- Does it match past hot sessions/workshops/invited talks at the venue?

2. Innovation Assessment:

- How is my work clearly different from the past year's related work? (not just a simple tweak)
- If it's combinatorial innovation (A+B), is it natural, effective, and insightful?
- Do I have a unique perspective or counter-intuitive but effective discovery?

3. Method vs Insight Framing:

- Is my method just a "reasonable trick" or does it reveal a new phenomenon/structure/principle?
- Which framing is better: a new model? a new phenomenon? a more general framework?
- Is it worth abstracting as "xxx is all you need", "rethinking xxx", or "beyond xxx"?

4. Dataset and Task Design:

- Am I proposing a representative new benchmark or task?
- If using existing data, have I chosen the right entry point/task definition/evaluation metrics?
- Have I proposed a compelling motivation from the application perspective? (e.g., "current models still fail in scenario X")

5. Reproducibility and Generalizability:

- Can others easily reproduce my work? (crucial for NeurIPS/ICLR)
- Can the method generalize to other domains?

- Have I done sufficient general analysis or interpretability experiments to support my claims?

III. Strategic and Risk Considerations

1. Maturity vs First-Mover:

- Is my work better suited for "careful polishing and mature submission" or "submit first round, iterate quickly"?
- Should I post on arXiv first to establish timeline, or wait for a complete version?

2. Submission Roadmap:

- Should I use workshop/spotlight/poster/oral strategy to familiarize with the field community first?
- If rejected this round, what's my backup venue? (ICML → NeurIPS → ICLR → domain-specific conferences)
- How does this paper fit into my overall PhD publication strategy?

Quick Checklist Before Starting:

- ☐ Can I explain my contribution in one sentence?
- ☐ Do I have a clear experimental validation plan?
- ☐ Have I checked recent papers (last 6 months) to ensure novelty?
- ☐ Is my framing aligned with conference trends?
- ☐ Do I have a backup plan if rejected?

8.3.5 Writing Effective Survey/Review Papers

The Value of Survey Papers

A truly good survey is more than just a literature dump. It requires simultaneous mastery of information density, structural clarity, and research insights.

I. Core Skills for Survey Papers

1. Fast Retrieval & Organization:

- Provide well-organized literature maps for the research community
- Enable readers to quickly find papers related to their specific tasks/problems/paradigms
- Create clear categorization, structured tables, and systematic summaries
- **Goal:** Readers can locate relevant work just from your figures/tables without reading original papers

2. Insight & Guidance:

- Help readers understand the entire research direction's structure, gaps, evolution, and future opportunities
- Address key questions:
 - Which directions are over-studied vs. neglected?

- Which methods/techniques are saturated vs. immature but promising?
- What are the key challenges/controversies/unsolved problems in the field?

II. Providing Organizational Frameworks

3. Structured Thinking Approaches:

- Don't just list "which papers exist" but teach "how to organize this research domain"
- Develop clear organizational frameworks:
 - **Clinical Pathway Framework** for medical AI papers
 - **Task vs Input-Output Type Matrix** for NLP surveys
 - **Backbone vs Head Layer Framework** for Vision domains
 - Clear architectural distinctions (e.g., LLM vs Agent systems)

4. Building Knowledge Taxonomy:

- Help clarify ambiguous or misleading terms, paradigms, and task definitions
- Critical clarifications to address:
 - What are the essential differences between LLM and Agent systems?
 - Are Diagnosis tasks and Reasoning tasks really evaluated the same way?
 - Are some SOTA results just "prompting tweaks" rather than fundamental innovations?
- This standardization is especially important in fast-moving domains (e.g., medical LLMs)

III. Critical Perspective

5. Beyond Summarization:

- Don't just summarize existing work—identify "what's problematic" and "which assumptions deserve rethinking"
- Example critical insights:
 - "Most models assume perfect structured inputs, which rarely exist in real clinical settings."
 - "Current benchmarks fail to reflect the coordination burden that dominates real-world workflows."
 - "The field conflates correlation with causation in many evaluation metrics."
- Such "reflective surveys" are considered more insightful and inspire future research

Common Pitfalls in Survey Papers

Avoid these mistakes:

- **Literature dumping:** Just listing papers without synthesis
- **Lack of critical analysis:** Only describing without evaluating
- **Poor organization:** No clear framework or taxonomy
- **Missing recent work:** Surveys become outdated quickly in fast-moving fields
- **Narrow scope:** Focusing only on one approach without considering alternatives

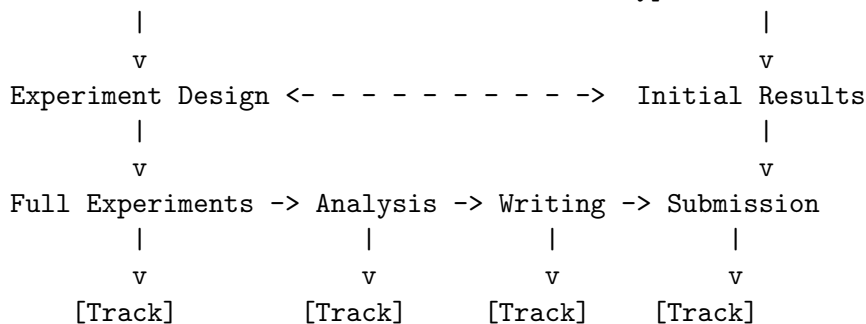
Quick Checklist for Survey Papers:

- ☐ Comprehensive literature coverage with clear categorization
- ☐ Organizational framework that structures the domain
- ☐ Critical analysis of gaps and limitations
- ☐ Future research directions clearly identified
- ☐ Tables/figures that standalone convey key information
- ☐ Coverage of very recent papers (last 6-12 months)
- ☐ Clear definitions and taxonomy for the field

8.4 Productivity Systems and Tools

8.4.1 Research Pipeline Management

Idea Generation -> Literature Review -> Hypothesis Formation



Tools for Each Stage:

- **Idea Generation:** Notion, Obsidian, Research diary
- **Literature Review:** Zotero, Mendeley, Connected Papers
- **Experiments:** Weights & Biases, MLflow, Sacred
- **Writing:** LaTeX + Git, Overleaf for collaboration
- **Project Management:** GitHub Projects, Trello, Asana

8.4.2 Time Management Strategies

Focus 80% of your time on:

- Core research that directly contributes to papers
- Writing and improving your communication skills
- Building deep expertise in your specific area

Limit to 20% of your time:

- Attending talks outside your direct area
- Administrative tasks and service
- Exploring tangentially related topics

8.4.3 Mental Health and Sustainability

Maintaining Long-term Productivity:

- **Regular Breaks:** Take weekends off, use vacation time
- **Physical Health:** Exercise 3-4 times per week
- **Social Connections:** Maintain relationships outside research
- **Hobbies:** Keep non-academic interests alive
- **Support Network:** Build relationships with peers and mentors

Dealing with Imposter Syndrome:

You're not alone—70% of PhD students experience imposter syndrome. It's especially common after conferences, reading impressive papers, or starting in a new lab.

Recognition Signs:

- "I don't belong here" or "I'm not smart enough"
- Attributing success to luck rather than ability
- Fear of being "found out" as incompetent
- Comparing yourself constantly to others

Coping Strategies:

- **Keep a "Wins Journal":** Document achievements, positive feedback, and progress
- **Normalize the Struggle:** Everyone faces challenges—they just don't advertise them
- **Focus on Growth:** Compare yourself to your past self, not to others
- **Talk to Peers:** You'll discover everyone feels this way sometimes
- **Reframe Thoughts:**
 - "I don't know enough" → "I'm here to learn"
 - "That was just luck" → "I created the conditions for success"
 - "Everyone is smarter" → "Everyone has different strengths"

Remember: PhD is a Marathon, Not a Sprint

Sustainable productivity beats intense bursts followed by burnout. Build systems that support consistent, long-term progress rather than relying on heroic efforts.

8.5 Academic Social Networking

8.5.1 Building Your Research Network

Conference Networking Strategy:

1. Before the Conference:

- Review accepted papers and identify interesting authors
- Prepare your elevator pitch (30 seconds about your research)

- Schedule meetings with researchers you want to meet
- Join conference Slack/Discord if available

2. During the Conference:

- Attend poster sessions—easiest place to meet people
- Ask thoughtful questions during Q&A
- Join social events and workshops
- **Sit with strangers at lunch**—not just your labmates
- Stand near coffee breaks—natural conversation starter
- Exchange contact information and follow up

3. After the Conference:

- Send follow-up emails within 48 hours (while memory is fresh)
- Share relevant papers or resources
- Consider collaboration opportunities
- Stay connected via social media/email
- Add new contacts to your network spreadsheet

Practical Conversation Starters:

- "What brings you to this conference?"
- "I really enjoyed your talk/poster on X. Have you considered Y?"
- "Which talks are you most excited about?"
- "How does your work relate to [current session topic]?"
- "I'm working on something similar—could I ask your thoughts on X?"

Networking Tips for Introverts:

- **Set small goals:** Meet 2-3 new people per day, not 20
- **Use the buddy system:** Network with a more outgoing colleague
- **Volunteer:** Being a session chair or volunteer gives you a role
- **One-on-one meetings:** Schedule coffee chats instead of group events
- **Take breaks:** Step outside to recharge between sessions

8.5.2 Online Presence

Essential Platforms for Researchers:

- **Google Scholar:** Track citations and create your profile
- **Twitter/X:** Follow researchers, share papers, join discussions
- **LinkedIn:** Professional networking and job opportunities
- **GitHub:** Share code and collaborate on projects
- **Personal Website:** Portfolio of your work and research statement

8.5.3 Building Your Academic Website

Your Digital Academic Identity

Your personal website is often the first result when someone searches your name. It's your opportunity to control your narrative and showcase your work professionally.

Why You Need a Personal Website:

- First Google result for your name—control what people see
- Showcase work beyond just papers (code, visualizations, blog posts)
- Professional presence for job applications
- Central hub linking all your other profiles

Recommended Website Templates:

1. Static Site Generators (Free hosting on GitHub Pages):

- [Hugo Academic](#)
 - Most popular template for researchers
 - Built-in publication management
 - Clean, professional design
 - Active community support
- [al-folio](#)
 - Beautiful Jekyll theme for academics
 - Minimal, elegant design
 - Great publication and project pages
 - Used by many CS researchers
- [AcademicPages](#)
 - Fork of Minimal Mistakes theme
 - Simple to customize
 - Good for beginners
 - Step-by-step setup guide
- [Jekyll](#) with Academic Themes
 - [Minimal Mistakes](#) - Highly customizable Jekyll theme
 - [Modern Resume](#) - Clean CV/resume focused
 - [Minima](#) - Jekyll's default theme, very simple
 - [Beautiful Jekyll](#) - Ready-to-use template
 - Free hosting on GitHub Pages with custom domain support

2. For More Dynamic Sites:

- **Next.js/React-based templates:** Modern, fast, good for CS students who code
- **WordPress with Academic themes:** No coding required, easier updates

- **Notion/Carrd:** Quick setup, limited customization

Essential Pages to Include:

1. **Home/About:** Professional photo, brief bio, research interests
2. **Publications:** Papers with PDFs/links, organized by year
3. **Projects/Research:** Current and past projects with descriptions
4. **CV/Resume:** Downloadable PDF, always up-to-date
5. **Blog** (optional): Technical posts, research updates
6. **Contact:** Email, office location, social media links

Quick Setup Tips:

- Start with a template—don't build from scratch
- Use Google Scholar for managing publication citations
- Include keywords for SEO (your research area, university, etc.)
- Keep design clean and professional—content over aesthetics
- Update at least quarterly (after each paper/project)
- Test on mobile—many people browse on phones

8.6 Essential Reading for PhD Students

Must-Read Books and Articles

These readings provide invaluable insights into the PhD journey, research life, and academic career development. Each has helped thousands of students navigate their doctoral studies more effectively.

8.6.1 Core PhD Experience

- **The PhD Grind** by Philip Guo
 - A candid memoir of one student's six-year journey through a computer science PhD at Stanford
 - Provides honest insights into the struggles, failures, and eventual successes
 - Essential reading for understanding the emotional and practical realities of PhD life
 - Available free online at <http://linyun.info/phd-grinding.pdf>

8.6.2 Career and Professional Development

- **A PhD Is Not Enough!** by Peter J. Feibelman
 - Guide to building a successful scientific career after PhD
 - Covers networking, job hunting, grant writing, and career planning
 - Practical advice on transitioning from student to professional researcher

- **Getting What You Came For** by Robert Peters
 - Comprehensive guide to choosing and succeeding in graduate school
 - Covers everything from selecting advisors to defending your dissertation
 - Includes strategies for time management and maintaining mental health
- **Deep Work** by Cal Newport
 - Strategies for focused work in a distracted world
 - Particularly relevant for research and writing
 - Techniques for maximizing cognitive capabilities
- **The 7 Habits of Highly Effective People** by Stephen Covey
 - Time management and personal effectiveness
 - Principles applicable to research and collaboration
 - Framework for long-term success and life balance

8.6.3 Online Resources and Blogs

- **The Illustrated Guide to a PhD** by Matt Might
 - Visual explanation of what a PhD really means
 - Helps maintain perspective during challenging times
 - Widely shared and appreciated by PhD students worldwide
- **PhD Comics** by Jorge Cham
 - Humorous take on graduate student life
 - Provides comic relief and community feeling
 - Addresses common PhD experiences and challenges
- **Nature Career Columns**
 - Regular articles on research careers and PhD life
 - Advice from established researchers
 - Current perspectives on academic job market
- **Academia Stack Exchange**
 - Q&A platform for academic life questions
 - Community wisdom on common PhD challenges
 - Practical solutions to specific problems

Reading Recommendation

Start with **The PhD Grind**—it's short, free, and will give you realistic expectations about the PhD journey. Read it before starting your PhD or during your first year to better understand what lies ahead.

A Presentation Checklist

Before every presentation, verify:

- ☐ Title slide has all required information
- ☐ Outline matches actual content
- ☐ All figures have labeled axes
- ☐ All figures have descriptive captions
- ☐ Experimental setup is clearly explained
- ☐ Results are connected to hypotheses
- ☐ Acknowledgments are included
- ☐ Presentation is within time limit
- ☐ Slides are numbered
- ☐ References are properly cited

B Figure Checklist

For every figure, ensure:

- ☐ Title clearly states what's shown
- ☐ X-axis is labeled with units
- ☐ Y-axis is labeled with units
- ☐ Legend explains all symbols/colors
- ☐ Font size is readable when projected
- ☐ Color scheme is accessible
- ☐ Error bars/confidence intervals shown
- ☐ Caption explains key findings

C Research Tools and Resources

C.1 Recommended Software

| Category | Tool | Purpose |
|--------------------|-----------------------------|-------------------------|
| Version Control | Git, GitHub | Code management |
| Writing | LaTeX (Overleaf), Markdown | Documents and papers |
| Data Visualization | Matplotlib, Seaborn, Plotly | Creating figures |
| Diagram Tools | Mermaid, PlantUML | Flowcharts and diagrams |
| Note Taking | Notion, Obsidian, Roam | Research notes |

Table 5: Essential research tools for CS and AI researchers

C.2 Terminal Setup Recommendation

Upgrade Your Terminal Experience: iTerm2 + Oh My Zsh

For a significantly improved development experience, we strongly recommend replacing the default macOS Terminal with:

- **iTerm2:** A powerful terminal emulator
- **zsh:** Modern shell (default on macOS)
- **Oh My Zsh:** Framework for managing zsh configuration
- **Powerlevel10k:** Beautiful and informative theme

Key Advantages:

- The terminal interface looks amazing — it shows path, time, git status, conda environment, etc. all by default
- Supports tabs and pane splits, so you don't need to open multiple windows
- Smooth syntax highlighting and auto-completion — feels super nice

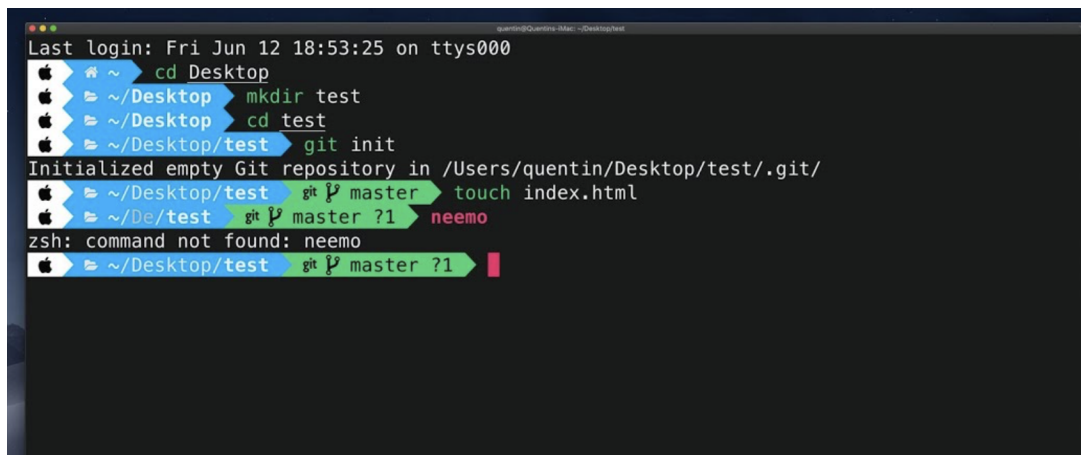


Figure 1: iTerm2 with Powerlevel10k theme showing git status, conda environment, and more

C.3 Visualization and Diagramming Tools

Advanced Tools for Research Visualization

C.3.1 Excalidraw

Website: <https://excalidraw.com/>

Excalidraw is a virtual whiteboard tool that enables you to create beautiful hand-drawn style diagrams effortlessly:

- **Perfect for:** Quick architectural diagrams, flowcharts, and conceptual illustrations
- **Key Features:**
 - Hand-drawn aesthetic that's perfect for informal presentations
 - Real-time collaboration for team brainstorming
 - Export to PNG, SVG, and clipboard

- Works entirely in the browser — no installation needed

- **Research Applications:**

- System architecture sketches during design phase
- Algorithm flowcharts for presentations
- Brainstorming session visualizations
- Quick diagrams for group meetings

C.3.2 PlotNeuralNet

Repository: <https://github.com/HarisIqbal88/PlotNeuralNet>

PlotNeuralNet is a LaTeX-based tool specifically designed for creating publication-quality neural network architecture diagrams:

- **Perfect for:** Research papers, thesis figures, and technical presentations
- **Key Features:**
 - Creates professional 3D neural network visualizations
 - Fully customizable layers and connections
 - Consistent styling across all diagrams
 - Generates LaTeX/TikZ code for easy integration
- **Research Applications:**
 - CNN/RNN/Transformer architecture illustrations
 - Paper and thesis figures that meet publication standards
 - Technical documentation of model architectures
 - Poster presentations at conferences
- **Pro Tip:** Start with the provided examples and modify them to match your specific architecture — it's much easier than building from scratch!

C.4 System Resource Monitoring and Performance Optimization

Essential Skills for Efficient Development

As researchers working with data processing and deep learning, monitoring system resources and utilizing parallel processing are critical skills that can dramatically improve your productivity and code efficiency.

C.4.1 System Resource Monitoring

Why Monitor Resources?

- Identify bottlenecks in data processing pipelines
- Detect memory leaks and inefficient code early
- Optimize GPU utilization for deep learning tasks
- Prevent system crashes from resource exhaustion
- Validate that parallel processing is working effectively

Common Parallel Processing Pitfalls:

- I/O bottlenecks limiting parallel gains
- Python's GIL (use multiprocessing instead of threading for CPU tasks)
- Overhead from creating too many small parallel tasks
- Insufficient memory causing thrashing

Quick Reference Commands:

```
# Monitor CPU usage
htop                # Interactive CPU monitor
top -u              # Alternative CPU monitor

# Monitor GPU (NVIDIA)
nvidia-smi -l 1      # Updates every 1 second
nvidia-smi           # Interactive GPU monitor
gpustat -i 1         # Simple GPU status

# Python parallel example
from multiprocessing import Pool
with Pool() as p:
    results = p.map(process_func, data_list)
```

Pro Tips:

- Always benchmark before and after implementing parallelization
- Monitor resources during the ENTIRE training process, not just at the start
- For deep learning: use `DataLoader(num_workers=4-8)` for faster data loading
- Check if your bottleneck is CPU, GPU, or I/O before optimizing

AI Disclosure

Some text and links in this document were compiled with AI assistance. Please forgive any broken links.