

MSEM Research and Writing Guidelines

Table of Contents

Introduction.....	1
Research and Writing Criteria	2
Getting Started with Research	3
The Research Process and Planning	3
Conducting Credible Research	3
Critical Examination of Research	4
Obtaining Research Sources	5
Library Research Resources	5
Online Research Sources	6
Using Online Databases for Research.....	6
Developing an Online Search Strategy.....	9
Quoting and Paraphrasing.....	9
Documenting Your Research.....	11
Principles of Documentation.....	11
Reasons for documentation.....	11
What to document.....	11
The Special Case of General, or Common, Knowledge	11
How to document.....	12
Documentation Style Considerations.....	14
Avoiding Plagiarism	17
Writing Style.....	19
Formatting the Research Report	20
Elements of the Research Report.....	20
List Of Tables	20
Word's Formatting Features	21
Footnoting.....	21
Bibliography	22
Page Numbering.....	22
Heading Styles	22
Table of Contents.....	22
Figures and Tables	22
Editing and Reviewing.....	23
Research, Documentation, and Writing Checklist.....	24
Research.....	24
Documentation.....	24
Formatting.....	25
Writing Mechanics.....	26

Introduction

The MSEM program encompasses two diverse worlds – the academic world of research and scholarship and the business world of practical, application-oriented training. In the one, students are expected to adhere to the fundamentals of academic integrity and scholarship. In the other, students get to acquire skills and capabilities that can be put to practical use the minute they walk out of the classroom.

Today's competitive business environment is, in part, driven by significant technological change. The change has led to global markets with shorter product life cycles and reduced time to market. Meeting this challenge has demanded that organizations move quickly to respond to strategic business opportunities. The quality of strategic decision-making is in part dependent on data used. Research and writing is absolutely critical in the selection, interpretation, and presentation of data. Few if any organizations will make significant strategic and or financial decisions without some sort of proof. Quality research and writing is a critical part of developing and presenting the proof. Research and writing is an important management competency.

MSOE is a university and not a trade school. While emphasis is placed on the practical aspects of each subject, as an academic institution, MSOE expects students to meet and adhere to universally accepted academic standards. This includes the honest presentation of research, which means that all research contained in reports and presentations is documented and verifiable.

A growing concern in the academic community is the increase in instances of plagiarism. Some of which is due to the easy access to research materials through the Internet. Intentional plagiarism, in which a student knowingly represents the work or ideas of others as their own, is grounds for dismissal. Unintentional plagiarism, in which a student neglects to document and account for the ideas and concepts discovered during research, diminishes the academic institution and puts the student in jeopardy.

For those entering the MSEM program, the research and documentation process can appear bewildering and a little overwhelming. For some, it has been several years since they were in an academic setting. Others may have degrees that did not give them the type of preparation needed for a rigorous graduate program.

To assist entering students, the following guidelines present the expectations of the MSEM faculty in the preparation and presentation of research reports.

Research and Writing Criteria

MSEM students are expected to demonstrate the following:

- An ability to conduct credible research on a management-related topic
- Analyze and interpret the research in a meaningful way
- Provide documented support of their conclusions
- And, present their analysis in a succinct and readable written report

Research Criteria

- Uses current and credible research sources (which means academic journals or other critical and competent sources)
- Avoids negligent plagiarism
- Follows documentation standards in the *MSOE Documentation and Style Guide*
- Uses research sources appropriate to the subject area. A student should be able to provide ample evidence of all research sources in the event that questions arise about the sources
- Clearly identifies the source for direct quotes and identifies the author's qualifications.

Report Criteria

- Follows format for written report – elements, margins, spacing, font size and style, etc.
- Demonstrates a logical approach to the subject
- Provides an introduction and appropriate conclusion
- Provides clear explanations of new or complex concepts (appropriate to graduate school level)
- Avoids sweeping generalizations and invalid assumptions

Writing Criteria

- Uses correct grammar
- Follows traditional punctuation practices
- Uses appropriate sentence construction
- Uses traditional paragraph construction
- Follows a formal writing style, which does not use personal pronouns, abbreviations, contractions, jargon, or colloquialisms.
- Uses correct spelling
- Defines unfamiliar and new terms
- Avoids gender-specific language where inappropriate
- Follows traditional mechanical conventions, i.e., capitalization, etc.

Getting Started with Research

The Research Process and Planning

The experience of gathering, interpreting, and documenting information, developing and organizing ideas and conclusions, and communicating them clearly will prove to be an important and satisfying part of your education.

As with any business project, planning is an essential element for success. Following are the steps in the research process:

- Topic selection: topics should be of interest to the student, manageable in scope, and have research available in the topic area
- Topic analysis: determine how much you already know about the topic and what you would like to know or need to know.
- Preliminary research: this is a broad review of the information available on the topic
- Redefining topic scope: after a broad review, you will begin narrowing the scope of your topic to a manageable level
- Additional research: this is targeted research directed at the redefined topic
- Analysis and interpretation: involves reviewing the research sources, gaining an understanding of the concepts and ideas, comparing with existing personal knowledge, critically analyzing each research source, and selecting
- Planning the report: begin outlining the logical flow of ideas from the research
- First draft: the first draft enables you to put down on paper your interpretation of the sources that you have selected. This includes paraphrasing and summarizing the sources, and the exact words of authorities. It demonstrates your comprehension of the material as well as your analysis of it. The important aspect of the first draft is to record your interpretations and analysis.
- Revision and editing: some believe that this stage of the process is the most important. This is where you shape your organization of ideas, sharpen your interpretations, and critically review your choice of words, sentences, and structure.
- Final draft: This is the outcome of your research. It is formatted in an acceptable manner and contains all the elements required by an instructor.

A number of resources are available to help you with the research process. It is highly recommended that you review the Student Academic Research Tutorial (START) (www.msos.edu/library/start/) on the MSOE Library web page.

Another resource is the Steps of the Writing Process (<http://www.millikin.edu/wcenter/process.html>)

Conducting Credible Research

When conducting research for an MSEM report or paper, you should endeavor to use scholarly or academic journals. With access to the Internet and access to the full-text of publications through MSOE's online databases, students have an abundance of research information available. As was noted in the Student Academic Research Tutorial (START), credibility can vary. An article in the *Journal of Business Strategy* is highly

credible, while an article in *The Business Journal of Portland* is not. You are urged to review that section of START.

For a discussion of scholarly journals, see:

<http://www.csbsju.edu/library/training/scholarj.html>

Critical Examination of Research

In addition to discovering credible research, you need to critically examine that research.

A guide to reading and writing academic reports can be found at:

<http://www.yukoncollege.yk.ca/~agraham/guides/guidec.shtml>

Another resource on critically examining research can be found at:

<http://www.library.cornell.edu/okuref/research/skill26.htm>

Obtaining Research Sources

Library Research Resources

The concept of libraries has changed dramatically in recent years. The traditional concept of a library is as a depository of information -- a collection of books and other materials that are housed within its walls. Today, a library is the gateway to information. It serves as the access point to a vast array of information, much of this due to the Internet and other electronic media. The traditional university library has become a "library without walls."

Following are some of the resources physically available at the MSOE library. Most college or university libraries have similar resources and public libraries, depending upon their size, will have some or all of these resources.

Library of Congress Subject Headings: University libraries use the Library of Congress cataloging method while public libraries use the Dewey Decimal system. The difference relates to how materials are cataloged, or what terms are used to describe a specific topic area. A simple example would be searching for information on "computer chips." A search of the MSOE catalog would probably turn up limited results, yet MSOE is an engineering university. It is not that MSOE doesn't have any books on designing computer chips, only that you are using the wrong term in searching for it. Under the Library of Congress system, you need to use a term like "semiconductor devices; design." To help in research, MSOE has a multi-book volume of Library of Congress subject headings that cross-references common terms with those used by the Library of Congress. In any research project, this would be good place to start to make sure you are using the correct terminology in search efforts. (Note: the [Library of Congress](#) is available on-line and accessible through MSOE's library homepage.)

Horizon Horizon is a proprietary computer system that includes an on-line catalog of the MSOE holdings. Horizon replaces the need to sort through the traditional card catalog. It provides bibliographic detail on books and materials located in the MSOE library and provides the call number to use to locate the materials on the library's shelves.

WISCAT This is a database that provides a listing of the holdings of most libraries in the state of Wisconsin, both public and private. This can be a useful tool in tracking down book titles or magazines/journals that are not carried at MSOE.

InfoPass InfoPass is a service that the MSOE library provides that entitles you to check out materials from the Marquette, UWM, or the downtown branch of the Milwaukee Public Library. You obtain an InfoPass from the MSOE librarian and must provide the bibliographic information for the book you want to access. (Note: A similar service is available in the Fox Valley through the Fox Valley Library Council. Contact your local library for more information.)

Inter-Library Loan This is a free service to students through which you can obtain books and copies of articles. Be advised that this service can take time, depending upon where the material you are requesting is located. However, in most cases, you can expect receipt of material within seven to ten working days. For inter-library loan, send an e-mail message to Anne Mosgaller at: mosgalle@msoe.edu

In addition, any research materials that you identify, including materials in the MSOE library, will be mailed to you by Anne. This saves you time of physically going to the library or some other location to pick up materials.

Online Research Sources

MSOE gives you access to a number of on-line databases, some of which provide full-text articles. Until recently, the only way to get full-text articles through the Internet was to visit each publication's homepage and determine if they made their articles available. In some instances, magazines did make these available, for a fee.

Today, you have access to several databases that provide full-text articles. All the databases listed in the *Database* area of the Library Homepage are available through computers on campus. Some, but not all, are available from any computer with Internet access. A number of databases are IP-protected, which means that the database verifies your location, i.e., IP address, and if it does not match their subscriber list, you are denied access.

Many of these databases can be accessed remotely by using your student ID barcode number or by using the MSOE proxy server. If, for some reason, you do not have a student ID card, then contact your instructor for a temporary barcode number you can use for research. For information on the MSOE proxy server, see <http://ccsd.msoe.edu/proxy/>.

Using Online Databases for Research

The most commonly used databases for academic research include:

BadgerLink

BadgerLink is supported by the Wisconsin Department of Public Instruction to provide Wisconsin residents access to quality online information in cooperation with the state's library community. It provides access to the *EBSCOhost* databases, which provides abstracts and indexing for over 3,200 scholarly journals covering the social sciences, humanities, education, business, and more. In addition, *BadgerLink* provides access to newspapers, including the *Wall Street Journal* and *New York Times*.

Accessing Badger Link

You can access *BadgerLink* databases by going to the MSOE library web page (www.msoe.edu/library) and clicking on Databases. Then, click on *Databases*. Experience has shown that the most productive *BadgerLink* databases for graduate-level research are Business Source Elite, Academic Search Elite, and Corporate ResourceNet. Or, if you are using a Wisconsin-based Internet Service Provider, you can access *BadgerLink* direct at: <http://www.dpi.state.wi.us/badgerlink/>

If you access *BadgerLink* directly, from the *BadgerLink* web page, click on Magazines and Journals (EBSCOHost Web). This will give you a listing of the available databases. Take a few minutes and look through the listings.

For a database demonstration, click on Business Source Elite (or you could place a checkmark in all three databases and click on Continue).

In the following examples, do not include the quote marks with the search term.

1. Type “knowledge management” in the search box. Click on Full Text. Click on Search.
2. This should return approximately 3,000 articles.
3. Locate the article “Building a Knowledge Portal: A Case Study in Web-enabled Collaboration” from *Information Strategy: The Executive’s Journal*. Click on the title. This gives you the full citation for the article, an abstract, and a link to a PDF file with the complete text of the article. It also identifies the *EBSCOHost* database the contains this article, in the event you had select to simultaneously search the three databases.
4. First, by reviewing the information in the abstract, you can determine if the contents of the article are relevant to your research. Next, you may want to determine if the publication is considered a scholarly journal, i.e., is peer reviewed. To do so, click on the magazine’s title.
5. This provides an overview of the publication and links to the issues available through the database. Next, click on Publication Details.
6. When you scroll down, you will see that this publication is not peer reviewed. However, that does not automatically exclude it as being a credible article. Next, take a look at the article. Click on the PDF file of the article.
7. If you scroll down to the bottom of the first page, you will see that the author is Director of Enterprise Operations at Northeastern University in Boston. Since the author is with a university, although not in an academic role, it builds the credibility for the article. Also, the article is 24 pages in length, which indicates that the article has some depth to it. Overall, even though not peer reviewed, this appears to be an acceptable academic-level article.

Several features of the BadgerLink databases can assist you in research. The first is the ability to search by publication:

1. Return to the original search page. Do not change the search term or the Full Text designation. In the Magazine box, enter “Harvard Business Review” and also select “search within full text articles” and select “also search for related words.” Click on Search.
2. The search should return about 80 articles. Click on the article “Learning Across Lines: The Secret to More Efficient Factories.”
3. This produces the complete citation and an HTML version of the article. Also available is a PDF file of the article. One area to look at is the Subject Listings. This gives you the subjects under which this article falls. By clicking on one of the subjects, this will produce a listing of all articles (including those without full-text availability). For example, click on Knowledge Management. This produces more than 3,300 articles, compared to the 300 when we limited our search parameters.

Another feature is to limit your search to scholarly journals:

1. Return to the original search page. Click on the Advanced Search tab at the top of the page. (If you had originally selected all three databases, click on the Choose Databases tab and then click on Business Source Elite, as this feature only works with single databases.)

2. Next, enter “knowledge management” in the first search box, then click on Full Text and Scholarly (Peer Reviewed) Journals. As you can see, the advanced search option gives you a number of search options. Click on Search.
3. This will return more than 300 articles that are from scholarly journals.

ABI/Inform

A second database that gives you full-text articles is ABI/Inform, which is considered one of the best business and management databases available. It contains well over 800 business, management, and economic journals and periodicals.

This is an IP-protected database, which means that you either need to access from a computer located at MSOE or use your student ID card’s barcode from a remote location.

1. From the MSOE Library web page (www.msoe.edu/library), click on Databases and then click on ABI/Inform
2. This database has similar features to EBSCOHost. In the search box, enter “knowledge management” and then check the boxes next to Show results with full text availability and Show total number of articles. In Publication Type, select Periodicals. Click on Search.
3. This will return more than 5,000 articles.
4. Now, let’s limit the search to Scholarly Journals. Return to the search page and add a checkmark next to Show articles from peer reviewed journals only.
5. This produces about 1,500 articles.

ABI/Inform has a number of search options. For example, if you go to Search Methods and select Guided Search, you will see that you can select from a long laundry list of article types. Also, you can specify a specific publication, such as we did with EBSCOHost. It is best to explore the search options available within this database.

FirstSearch

FirstSearch gives you access to 37 bibliographic databases. These give you source citations, but do not give you access to full-text articles. When conducting research, you should not just rely on the online full-text databases, as they are limited in the number and type of publications that they cover. For example, FirstSearch gives you access to specialized databases that provide citations for papers presented at society meetings and proceedings from conferences. Once you have these citations, you can request copies through Interlibrary Loan.

1. Go to the MSOE Library web page at: www.msoe.edu/library and click on Databases. Then, select FirstSearch. You will need an authorization number and a password to access this database. To obtain these, contact the MSOE Library at 277-7180 or e-mail Gary Shimek, MSOE Library Director, at shimek@msoe.edu
2. When you have access to FirstSearch, first select List All under Databases. This gives you the complete list of databases available on FirstSearch. Then, let’s start with the ArticleFirst database. Enter “knowledge management” in the search box and select Date in the Rank By section. Click on Search.
3. This results in more than 1,300 articles. Click on the article entitled “What Can Knowledge Management Systems Deliver?”
4. The provides the basic citation for the article. Now click on Libraries the Own Item.

5. This gives you the libraries that have *Management Communication Quarterly* in their collections. You will note that both Marquette and UWM have this periodical. You could either visit the library and make a copy of the article or request a copy through Interlibrary Loan.
6. Next, return to the database listing and choose WorldCat, which is a database of books. Repeat the same search.
7. When you see the results, note that other sources are listed at the top. If you click on Internet, that will give you more than 180 Internet sites including ebooks related to knowledge management.
8. Explore the various databases that are available through FirstSearch

Developing an Online Search Strategy

To take full advantage of the online resources available for research, you should follow a set path of uncovering information about your topic. Here are the steps that are recommended:

1. In the early stages of a research project, you may have a general idea of the topic that you want to pursue. To help you narrow that down, you may want to consult books on the subject, especially textbooks. To find books, you have several sources to use. First would be the MSOE Library catalog (Horizon) to see what books are in the MSOE Library. Next, you may want to use WISCAT to see what books are available at local libraries in the state. Another source would be the WorldCat database in FirstSearch. And, finally, you may want to consult the Library of Congress, which will give you the most comprehensive listing of books on a subject. Another source you should not overlook are online booksellers, such as Amazon and Barnes & Noble. Many times their descriptions include chapter information, etc. Another source for information on a specific book, would be to check the web site of the publisher. Sometimes the publisher provides detailed information on the table of contents and other details about the book.
2. Looking at the information in books should help narrow a topic. Now, visit the online databases of full-text articles, such as ABI/Inform, Business Source Elite, Academic Source Elite, Corporate ResourceNet, etc. Pay attention to your search terms and compare them with the subject listings for each article you access. This can help you better define your search parameters.
3. Next, go the FirstSearch and continue searching, using your newly defined search parameters. As noted previously, only relying on full-text databases will give you limited results. For a well-rounded research effort, you should use all the resources available.
4. It is highly recommended that you include a visit to the library as part of your research efforts. While the Internet provides excellent access to research sources, many times you can find other interesting articles by simply paging through an issue of a magazine that contains an article discovered during your FirstSearch research.

Quoting and Paraphrasing

When reporting on research discoveries, you have several ways in which to do this. The simplest is simply to use the same words as the original author, in other words, use a direct quote. However, a research report that mainly consists of direct quotes does not demonstrate any understanding by the student. Therefore, students should limit direct

quotes to instances where you want to add emphasis to a statement by quoting an authority, or when restating the quote in your own words would diminish the impact of the quote.

The more common ways of handling research is through summarizing and paraphrasing. In summarizing, you are providing the reader with a synopsis of the research in your own words. For example, several pages, a chapter, or even an entire article or book might contain only one or two thoughts that relate your topic. You may be able to summarize that in a paragraph or less.

With paraphrasing, on the other hand, you are taking the author's original words and restating them in your own words.

For more information, go to:

<http://www.wisc.edu/writing/Handbook/QuotingSources.html>

Documenting Your Research

Everyone at a university needs to pay attention to the issue of proper documentation. All of us--faculty and students together--draw from a vast pool of texts, ideas, and findings that humans have accumulated over thousands of years; we could not think to any productive end without it.

In MSOE's MSEM program, we follow the *Documentation and Style Guide* (www.msoe.edu/gen_st/style) for documenting research sources. A number of different style guides exist. You may have become familiar with a different style of documentation during your undergraduate studies. The underlying principle of a style guide is to impose a certain discipline on the reporting of source information. It just means that information used in documenting your sources should be presented in a certain order, using a specified format.

MSOE's *Documentation and Style Guide* is patterned after *The Chicago Manual of Style*, which is widely used in business. The only difference between our style guide and Chicago is the placement of the publication date. In Chicago, it appears near the end of a citation. In our style guide, the date is the second element in the citation. Since *Chicago* is available at virtually any library, if you have a question about how to document a source that is covered in the *Documentation and Style Guide*, you can simply check with a local library.

Principles of Documentation

Reasons for documentation

We document sources for two reasons. First, it provides the reader with information on how to obtain additional information. You will find this feature useful as you conduct your research. Second, it recognizes or gives credit to the originator of the ideas, words, or facts. If you don't do this, you are committing plagiarism.

What to document

A source must be documented if you:

1. quote it verbatim
2. summarize a passage in your own words without quoting it
3. borrow wording as well as ideas from a passage (paraphrasing),
4. cite somebody's opinion
5. paraphrase an argument or opinion that is not generally known
6. cite information or statistics that are not generally known
7. allude to statements not generally known (usually, very familiar quotations--Milton, Shakespeare, or Lincoln, for example--need not be documented. But recent quotations from press conferences must be documented, at least until they become familiar as well).

The Special Case of General, or Common, Knowledge

One of the more perplexing aspects of footnoting or documenting your sources is how much documentation is needed. Do you need to document every sentence? Or, should

you only document direct quotes? Unfortunately, no hard-and-fast rule applies, with the exception that you always must document direct quotes.

The confusion arises when you encounter the situation of *common knowledge*. Within any given field, a certain amount of the information that you encounter in your research will be common knowledge in that field. Common knowledge does not need to be documented.

How does one define common knowledge? Well, in a research report for this class, only three types of statements should be used: facts, opinions, and assumptions. You are not expected to document basic assumptions, except in those instances wherein specific reference is made to the particular research upon which an assumption has been based.

Facts and opinions do require documentation. Some facts are widely known, easily verified. No one will challenge that Herbert Hoover was President of the United States, or that the Detroit Tigers belong to the American League in professional baseball. Information like that can be confirmed easily in several readily available sources, or is common knowledge. It needs no documentation.

Other facts are commonly known within a discipline. Facts that appear throughout the literature for a discipline ordinarily require no documentation. As long as one or more items in the Bibliography contain the information, you have authority to which you can refer should questions arise.

Still, other facts do require documentation. These facts are:

1. Not well known, even within a discipline;
2. Contradictory to other facts or suppositions;
3. Obscure, or difficult, for the reader to verify;
4. Specific pieces of information that bear directly upon important points;
5. Brought in from other disciplines;
6. In some way open to question, because readers are not as well informed about the problem as the researcher.

Opinions carry little weight when measured against facts. Nevertheless, in some instances no evidence can be found except for expert opinion. Whenever expert opinion is presented, it should be clearly identified (e.g., “White believed . . .,” or, “In White’s opinion . . .”) and given proper documentation.

A good practice to follow is, if you are in doubt, document.

How to document

The *Documentation and Style Guide* contains a great number of examples of how to document specific sources that you may encounter in your research. However, as noted earlier, a style guide imposes a certain discipline on the how information is presented in footnotes and the bibliography. Understanding the underlying discipline will enable you to create your own citations in the event you encounter a situation not covered in the *Documentation and Style Guide*. The following descriptions are adapted from *The Chicago Manual of Style*.

The basics of documenting a book

The following information should be included, where applicable, in both the initial footnote for a source and the bibliographic entry. The order in which this information is listed is the order in which it should appear. Variations in content and order may be necessary for certain types of books, which are covered in the *Documentation and Style Guide*. The information used should be obtained from the title and copyright pages of the book:

- Author: full name of the author or authors; full name of the editor or editors if no single author(s) listed (editor's name may be given after title); or name of institution responsible for the writing of the book. (In the event that no author or editor or institution is listed as the author of the work, then the title of the work is the first element in the footnote and bibliography.)
- Date of publication: this should be the most recent copyright date
- Title: full title of the book, including any subtitles. Book titles appear in italic.
- Editor, compiler, or translator, if any, and if in addition to listed author (may be located in author's position if no author listed)
- Edition, if appropriate
- Volumes: total number if multivolume work is referred to as a whole
- Volume number of a multivolume work, if single volume cited
- Title of individual volume, if applicable
- Series title, if applicable
- Facts of publication: city and publisher. When multiple cities are listed on the title page, use the first city listed. For well-recognized cities, such as Chicago and New York, the state is not required. However, for cities not as well-known or where several cities may have the same name, such as Greenville, South Carolina, the state should be included.
- Page number(s): in the footnote, you must provide the specific page or pages on which the material cited can be found.

Following are samples of a footnote and bibliographic entry for a book:

¹Curtis E. Tate, Jr., Leon C. Megginson, Charles R. Scott, Jr., and Lyle R. Trueblood, 1975, *Successful Small Business* (Dallas, TX: Business Publications, Inc.), p. 127.

Tate, Curtis E., Jr., Leon C. Megginson, Charles R. Scott, Jr., and Lyle R. Trueblood. 1975. *Successful Small Business*. Dallas, TX: Business Publications, Inc.

The basics of documenting an article

The order of the elements for an article are similar to that of a book:

- Author or Authors: This is similar to the information for a book. Again, in the event no author is listed, the title of the article appears first.
- Date

Title: The title uses regular title capitalization and is enclosed in quote marks.
Issue information: this could include volume and issue number
Page reference: for the footnote, this should include the page or pages on which the information is contained. For the bibliographic entry, this should include the range of pages of the article.

Following are sample footnote and bibliography entries:

¹Gary Blau, December 1994, "Developing and Testing a Taxonomy of Lateness Behavior," *Journal of Applied Psychology* Vol. 79 (6), p.963.

Blau, Gary. December 1994. "Developing and Testing a Taxonomy of Lateness Behavior." *Journal of Applied Psychology* Vol. 79 (6), pp. 959-970.

The following is an example of no author being listed:

¹"Database Marketing Demystified," June 1993, *Target Marketing*, p. 13.

"Database Marketing Demystified." June 1993. *Target Marketing*, p. 13-16+

Note: In addition to following *The Chicago Manual of Style* for documentation, you should follow it for writing style. More information on that can be found at:

<http://www.chicagomanualofstyle.org/cmofstyle.html>

Another web site that may prove useful is the "Quick Reference Guide to Chicago" (Note: the Documentation and Style Guide deviates somewhat from Chicago. With the Documentation and Style Guide, the date is placed following the author.)

<http://www.library.wvu.edu/ref/Refhome/chicago.html>

Documentation Style Considerations

The *Documentation and Style Guide* should serve as your source for documentation style. Following is a general discussion of the major areas of documentation style.

Footnote placement and format

Footnotes are placed at the end of a sentence or paragraph and follow the punctuation. For a more detailed description of the placement of footnotes for special instances, see the "Mechanics of footnoting and footnotes" in the *Style Guide*.

Footnotes are numbered consecutively throughout the entire report. You do not restart footnote numbering for each page. Nor do you repeat footnote numbers. Each footnote should be treated as being unique.

For best results, use the automatic footnoting feature in Word and other word processing programs. All you need to do is to place your cursor where you want the footnote to

appear, click on Insert in the toolbar, and click on Footnote (Reference/Footnote in Word 2002). Make sure you choose footnotes, rather than end notes for placement.

The first line of the footnote should be indented. The recommended indentation is 0.25” rather than the default 0.5” in Word.

The first time you cite a source, you should provide complete information in the footnote. The next time you cite the same source, you can use a shortened version of the footnote as described in the “For subsequent references to the same source” section of the *Style Guide*.

You need to distinguish between sources obtained physically and virtually in your footnote and bibliography. For sources that you obtain online or through an online database, you should retain a copy of the source and indicate in the footnote: A copy of this article is in the student's possession and may be consulted by contacting the student at smithj@msoe.edu .

A footnote should contain the specific page or pages on which the material being cited can be found. The only exception of this is when you have an online source. Since you cannot know on which page in the original work the information can be found, for subsequent references, you do not need to include a page number. However, in the complete citation, you should include the page numbers contained in the original citation.

Format and style for quotes

Direct Quotes

A direct quote is when you use someone else’s words verbatim. It should be enclosed in quote marks with the footnote following the quote mark. If you copy-and-paste from an article or online site and just place a footnote without the quote marks, you are committing plagiarism.

In addition to source documentation, direct quotes require source attribution. That is, a direct quote must be attached to someone or something. This is typically expressed as an introductory phrase, such as “According to Smith,” or “Jones stated:”

When you attribute material to an author or some other authoritative voice in your text for the first time, you should provide the person’s full name and their credentials, e.g., at least their functional title and organizational affiliation. For example:

According to Gary Armstrong, Crist W. Blackwell Distinguished Professor of Undergraduate Education in the Kenan-Flagler Business School at the University of North Carolina at Chapel Hill, and Philip Kotler, S. C. Johnson & Son Distinguished Professor of International Marketing at the Kellogg Graduate School of Management, Northwestern University, today marketing is about “creating customer value and satisfaction.”¹

After this full identification of the author or authors, you can use their last name or names in subsequent references to them within your text. For example:

Armstrong and Kotler maintain that too few organizations approach marketing from a customer value viewpoint.²

When you have a quote that is five or more lines, you should treat it as a lengthy direct quote, which requires a different type of formatting. With a lengthy direct quote, you single-space the direct quotation and indent it from both margins. With this format, you do not use quotation marks. For example:

According to Jeff Bezos, CEO of Amazon.com:

We want to deliver a special experience to every customer. The customer experience really matters. We're focused on just having a better store, where it's easier to shop, where you can learn more about the products, where you have a bigger selection, and where you have the lowest prices. You combine all of that stuff together and people say, "Hey, these guys really get it."¹

If the above example were less than five lines, you would have the situation of a quote within a quote. In this instance, you use single quote marks for the quote. For example:

Bezos said, "You combine all that stuff together and people say, 'Hey, these guys really get it.'"¹

Note that quote marks always follow the punctuation, even when you are placing a special term in quotes. For example: If the above example were less than five lines, you would have the situation of a "quote within a quote."

Indirect Quotes

When you paraphrase or summarize research material, it is considered an indirect quote and you need to document that.

At times, you may have an entire paragraph that you have summarized or paraphrased this is from the same source. In this instance, you only would need to footnote the paragraph. However, if, within the paragraph, you have added your own observations, then you need to footnote those sentences that are not your own observations.

In some style guides, they recommend that you document each sentence in an indirect quote. However, in the MSOE Documentation and Style Guide, this is not required if all the information in the paragraph is from the same source.

In the event that it requires more than one paragraph to summarize an article or other source, you have two options. One is to document each paragraph. The other is to begin the summarization with attribution and then footnote the last paragraph.

Article and book titles

Titles of articles, whether in the footnote, bibliography, or text, should be enclosed in quotes and you should use title case. That is, all words in the title should have an initial capital letter with the exception of prepositions, articles (a, an the), and coordinating conjunctions (and, but, or, for, nor) unless they are the first or last word of the title. For books, the title is in italic and uses title case.

Names of books and periodicals appear in italic in the footnote, bibliography, and text.

Constructing the Bibliography

The bibliography provides a record of your research. It not only includes those sources that you use in your text, but also any sources that you consulted that relate to the subject, even though you did not use material from them in your text. As a record of your research, the bibliography provides readers with relevant research on the topic.

You should review the “Preparing the Bibliography” section of the *Style Guide*.

Avoiding Plagiarism

First, faculty in the MSEM program believes that students are ethical and would not deliberately misrepresent someone else’s work as their own. So, how then does plagiarism occur?

The two main reasons are poor notetaking and negligence. When taking notes, or copying material from an online source, you need to insure that you are preserving the integrity of your source. It is disheartening to have to go back and try to locate a source that you would like to use in a report.

The easy access to full-text articles online has led to an increase in negligent plagiarism. This is caused by either not knowing when documentation is needed or forgetting that the paragraph you pasted into your report came directly from one of your sources. Being diligent in keeping track of your source material and being familiar with documentation can avoid this situation.

The more common types of negligent plagiarism include:

Copy-and-Paste with documentation – this is the most common form of plagiarism. The student simply copies from an online article and pastes that into the report. The student then documents the source, but fails to indicate that this is a direct quote.

Copy-and-Paste without documentation – this is the same situation as described above, however the student does not document the source.

Using another’s organization – in this instance, the student decides to follow the organization from an article or book. In other words, the approach to the topic, the arrangement of ideas, and the scope of the content are someone else’s.

Using another’s significant intellectual property elements – significant ideas, methods, and conclusions belonging to someone else, but used by a student without attribution, constitutes plagiarism. The intellectual property may be taken from either web or print resources.

Using a report for another class – submitting a report that was prepared for another course can also be considered plagiarism, if the student has not obtained permission from the instructor. The student, in effect, is misrepresenting that the report was prepared for the current class. Also, using material from another report without documenting it, even if it was your report.

For more discussion about plagiarism and how to avoid it go to:

Frequently Asked Questions

Why must I have source attribution with direct quotes when I am already documenting my source? Shouldn't that be enough?

Direct quotes do not magically appear in a report. They need to be attached to someone or something. You don't need to always attribute a quote to an author. For example, if the author happens to be a staff writer for a magazine, you may want to use the magazine for attribution and not the author.

Why do I need to provide credentials for an author? Isn't it enough that the article was published in a prestigious academic journal, such as Harvard Business Review?

The author's credentials are presented as a further way for the reader to judge the credibility of the source. For example, a corporate executive writing about his or her company's practices may be less objective than a professor of management at a major university.

My whole paragraph is from the same source and the same page, why do I have to document the direct quotes in the paragraph separately?

Direct quotes must always be footnoted, even in this instance.

Why can't I just repeat a footnote's number, especially for online databases?

As mentioned earlier, the *MSOE Documentation and Style Guide* is based on *The Chicago Manual of Style*. To be consistent, we follow the *Chicago* style of consecutively numbering footnotes.

Writing Style

Formal Writing Style

Research reports should be written in a formal writing style. You may want to set your word processor's spelling and grammar checker to a formal writing setting. Formal writing style means:

- Use of third person: Does not use personal pronouns. When identifying one's own observations, experience, or ideas, typically you refer to yourself in the text as "this author" or "this writer." In some cases, an instructor may prefer that you use the first person. If not specifically stated by an instructor, assume you will use the third person.
- Do not use contractions. Spell out contractions such as don't, can't, isn't, they're, etc. Note: the correct way to spell out can't is cannot.
- Do not abbreviate. This is not absolute as some abbreviations are recognized, such as Dr., Mr., etc. In most cases, though, avoid abbreviations. Note: acronyms are not abbreviations and are permissible in formal writing.
- Avoid slang, jargon, and colloquialisms. Conversational terms such as "up front," "bottom line," etc. should not be used in formal writing.
- Wherever possible, you should use active voice in formal writing, rather than the passive voice.
- Avoid "there are" and "there is" sentences, which are a form of passive voice.
- Avoid vague modifiers, such as very. Be precise in selecting modifiers.

Defining Terms and Acronyms

You should define any unfamiliar or new words or terms that you encountered in your research. You can define them in your text or you can use a footnote to provide the definition. (Note: footnotes can be used for other purposes besides documentation.)

Acronyms can be used in a research report. However, you should define the acronym before using it. The preferred method is to spell out the term and then place the acronym in parenthesis, i.e., total quality management (TQM).

Use of Numbers

Current usage is that you spell out numbers that can be expressed in one or two words. The exceptions are when you are dealing with technical quantities or amounts, percentages, street addresses, etc. A review of this can be found at: <http://owl.english.purdue.edu/handouts/esl/eslnumber.html>

Punctuation and Mechanics of Writing

Commas and hyphens can help minimize reader confusion. The following are two handouts that provide a concise set of situations for commas and hyphens.

Commas at: http://owl.english.purdue.edu/handouts/grammar/g_comma.html

Hyphens at: http://owl.english.purdue.edu/handouts/grammar/g_hyphen.html

Formatting the Research Report

Elements of the Research Report

The writer's job is to make it as easy as possible for multiple readers to find information in a report. Formal elements are tools we use to accomplish this.

The Title Page

Includes title, reader's name, writer's name, date, and organization

Title needs to be complete, give reader specific topic you are writing about, don't be vague

Table Of Contents

The headings listed should be the same headings used in the report. Most word processors have the capability of automatically generating and formatting a Table of Contents.

List Of Tables

This is separate from the Table of Contents and lists all of your tables. Each table needs to be identified with an identifying number (e.g., "Table 1") and a descriptive caption. The number, caption, and any documentation must appear below the table.

List Of Illustrations/Figures

This is separate from the Table of Contents and the List of Tables and lists all of your figures. Each illustration, visual, chart, etc. needs to be identified with a figure number and descriptive caption. The caption and documentation must appear below the figure, or illustration.

The Abstract

A brief summary of the report -- should be no more than 5% of length of the total text. Think about the abstract as explaining what your report is about in "twenty-five words or less."

Directed primarily to readers who are, at least, somewhat familiar with the subject.

Therefore, you can use specialized terminology freely without definitions, etc. The Abstract should be single-spaced.

Text

Text should be double-spaced, unless otherwise specified by your instructor. Do not add extra spaces between paragraphs; indent instead. Use heading/subheadings to help guide the reader. Number the pages (note: front matter uses lower case Roman numerals, text and end matter are consecutively numbered using Arabic numerals).

Visuals

In your text, visuals should appear within the body of text. Also, you need to reference your visuals within the text. For example, in your text you might state: "Figure 1 shows this relationship." Then, the figure should appear as close to its reference as possible.

Visuals should contain a caption and documentation, which appear below the visual.

Glossary

Alphabetical list of definitions and acronyms. If you defined a term or phrase in your text, it should be in the glossary. Also, don't forget to place acronyms in the glossary. For lengthy reports, the glossary is an invaluable aid for the reader. For example, if you define a term on the second page of a report and then use it again on page 18, the reader would have to page back through the report to find the meaning of the term, without the glossary. Realistically, readers do not search out definitions. Rather, they "guess" at the word, using the context, and proceed. However, with a glossary, the reader is more inclined to check the word's meaning. Obviously, this makes for more effective writing. A simple way to format the Glossary is to use the table function in Word. Use a two-column table and you will end up with a glossary that is similar to one in the sample report.

Bibliography

The Bibliography is inclusive. That is, it includes all research materials that you consulted, whether you cited those materials or not. Arrange your bibliographic entries alphabetically. See the *Style Guide* for more details on the formatting the bibliography.

Titles of articles or books: Often, students are confused as to what to capitalize for a book or article title, especially since many of the online databases use varying styles of capitalization. For example, titles should appear as upper and lower case, not as all upper case. According to *The Chicago Manual of Style*, the first and last words of the title, plus all nouns, pronouns, adjectives, verbs, adverbs, and subordinating clauses (if, because, as, that, etc.) should be capitalized. Articles (a, an, the), coordinating conjunctions (and, but, or, for, nor), and prepositions, regardless of length, are shown in lower case unless they are the first or last word of the title or subtitle. No word in a title should be in all upper case, regardless of how it appears in the original, unless it is an acronym.

Page Numbering

The pages preceding the report proper, the front matter, should be numbered using lower-case Roman numerals. The front matter includes the title page (however, a number does not appear on the title), table of contents, list of illustrations, and abstract. The remaining pages of the report use Arabic numerals.

Appendix

The Appendix section of a report is useful for presenting peripheral information. This is information that relates to report, but would not be appropriate for inclusion in the report. For example, if you were to undertake a survey using a questionnaire, you may want to include in the Appendix the questionnaire, the raw data, the statistical analysis, etc. The Appendix is *not* required for your final report.

Word's Formatting Features

Footnoting

Place your cursor where you want the footnote to appear. Click on Insert in the toolbar and select Footnote. A pane should appear at the bottom of the page. Be sure to select the Footnote option, rather than Endnotes. Type in the footnote information. This feature will automatically position the footnote at the bottom of the page (Note: in some older

versions of Word, footnotes can sometimes "spill over" to the next page. Do not concern yourself with this.) Also, if you later move text from one position to another, footnote numbers are automatically updated.

Bibliography

Bibliographic entries should have a hanging indent. Place your cursor anywhere within the bibliographic entry. Click on Format in the toolbar and select Paragraph. Under Indentation, click on the button for Special and select Hanging Indent. The default setting is 0.5". However, from an esthetic standpoint, it is best to change that to 0.25". (Note: You can also use the Style feature to create a bibliography style.)

Page Numbering

The front matter of a report (title page, table of contents, list of figures, and abstract) uses lower case Roman numerals. The rest of the report uses standard numbering. To achieve this, you do not need to create two files. Rather, at the end of the front matter, insert a page break. When doing this, select Section Break Types/Next Page. This separates the file into sections. You can now format the individual sections. So, for page numbering, in the front matter, you can select Insert/Page Numbering and select the proper format and have it apply to this section only. The same applies to your text and bibliography.

Heading Styles

Headings should be used within your reports to distinguish topics and sections of a report. You can manually create your headings or use the heading feature in Word. If you examine the toolbar, you will see that Normal is your default template style. Clicking on that box will display the other available templates. Typically, this has at least three levels of headings. Most students use the default settings in Word. However, you can modify styles or add new styles. To do so, place your cursor within the text of the style you want to modify. Then, click on Format in the toolbar and select Styles and Formatting. Information on the current style will be displayed. Click on Modify and make sure you check the box Add to Template. Now, you can modify the font, paragraph, etc.

Table of Contents

Provided you have used style templates for your headings, as described above, you can automatically generate a table of contents. To do this, on the page following the title page, type Table of Contents (use boldface and the Normal style and select a type size appropriate for a heading). Then, place your cursor on the next line and select Insert/Index and Tables. Select the Table of Contents tab. This will give you options as to format of the table and how many levels of headings you want to display. Make your choices and click on OK. This will automatically generate your table of contents. You can periodically update this if you move things around by placing your cursor anywhere within the table and repeating the Insert/Index and Tables process. Keep in mind that the Table of Contents should contain only those elements that follow it.

Figures and Tables

When using graphics, tables, pictures, and other types of visual devices in a report, you need to provide two elements. One is a caption that identifies the contents of the graphic. The other is to provide documentation for the graphic or table. Documentation and examples of figures are contained in the *Style Guide*. Captions can be generated automatically. Place your cursor beneath the figure, click on Insert/Caption. A pane will open with Figure 1: already generated. Simply type in the caption text and click on OK. My suggestion is to use this feature, even for tables. This makes the rest much easier because now you can automatically generate a List of Figures. Again, at the top of a page, type List of Figures (use one of your heading styles so that this appears in your

table of contents). Then place your cursor on the next line and select Insert/Index and Tables. Now select Table of Figures.

Editing and Reviewing

Two features that some instructors use in their feedback to you are the editing and reviewing functions.

Editing

At the bottom of the Word pane is TRK. Double click on that to activate the editing feature. Right click on TRK to make sure that Highlight Changes is selected. When place your cursor over an editing change, it should display the author of the change and what the change is.

Reviewing

To provide comments within a report, select Insert/Comments from the toolbar. Placing your cursor over the comment indicator on the page should provide a pop-up window with the comment. Or, you can select View/Comments from the toolbar and see all the comment in a separate pane.

You can also activate this from the View/Toolbar command. Just select Reviewing and an additional toolbar will appear at the top of the document.

Research, Documentation, and Writing Checklist

Research

- ❑ Only credible research sources should be used. These include peer-reviewed journals and other respected publications in the field.
- ❑ A student should be able to provide ample evidence of all research sources in the event that questions arise about the sources. If possible, copies of research materials should be retained by the student.
- ❑ Use of Web sources that may not clearly be identified as peer-reviewed items must be accompanied by a critical commentary, usually with analysis by other sources.
- ❑ The student should critically examine the ideas and concepts presented in the research, not simply accept all statements as fact.

Documentation

- ❑ For all papers and reports, use of the *Documentation and Style Guide* (www.msoe.edu/gen_st/style/) is mandatory.
- ❑ Direct quotes should include a footnote (documentation) and attribution (affixing the quote to someone or something).
- ❑ With source attribution, the identify of the author should include, at a minimum, the authors functional role and organizational affiliation, i.e., professor of marketing at Northwestern University's Kellogg Graduate School of Management.
- ❑ Direct quotes must appear using quotation marks. Direct quotes, even if documented, that do not contain quotation marks are considered to be plagiarized.
- ❑ Direct quotes of five lines or longer should be single-spaced and indented from both margins. Quote marks are not used to lengthy direct quotes.
- ❑ Students must document more than just direct quotes. Any research that they summarize or paraphrase should be documented. This includes ideas, concepts, and even the organization of information. As a rule of thumb, all statistics and quantifiable data not generated in primary research by the student should be documented. Anything not representing the student's original thinking should be documented.
- ❑ Footnotes should be numbered sequentially and the footnote should appear at the bottom of the page.
- ❑ Footnotes intended to support a list of items or material should be placed at the end of the list or material, not at the beginning. A single footnote that is used to support a list in this manner may cite more than one page from a source; the footnote may also cite more than one source.
- ❑ Footnotes should have corresponding entries in the bibliography.
- ❑ Footnotes (and the corresponding bibliographic entry) should be accurate. Footnotes must be able to be verified. If the student cites a book, that book must be in existence and the information cited must be present on the page or pages cited. If a web site is cited, the URL should be currently available for review.
- ❑ Names of authors, publishers, periodicals, places of publication, etc. should be correctly and consistently spelled.

- ❑ Titles of works should be presented in the correct format. This includes use of italic for book titles and names of publications, use of quotes for article titles or chapter titles, and use of upper and lower case for all titles.
- ❑ Correct punctuation should be used for footnotes and the bibliography. Note that commas are used to separate elements of a footnote, whereas periods are used in the bibliography.
- ❑ The bibliography should include all relevant sources consulted by the student for the research report, not just those sources cited in the report.

Formatting

- ❑ At a minimum, reports should include a title page, the text of the report, footnotes, and a bibliography. Instructors will specify what elements they require in a report.
- ❑ If a table of contents is required, then the title page, table of contents, list of figures, list of tables, and the abstract or executive summary should be considered as front matter and pages numbered using lower case Roman numerals. The list of figures and the list of tables should appear on separate pages. The abstract or executive summary should be no longer than one page. It should additionally feature the following elements: a statement of the purpose of the paper and objectives; a statement about methods employed to carry out research; and a statement of the major findings, conclusions, and recommendations. The table of contents should list all of the major sections and subsections of the paper or report with corresponding pagination. Headings in the table of contents should match precisely headings as they appear in the body of the paper or report. Pagination in the table of contents should match precisely pagination as it appears in the body of the paper or report.
- ❑ Pages should be numbered, with the exception of front matter, using Arabic numerals. The preferred placement of page numbers is centered at the bottom of the page.
- ❑ Text should be double spaced, unless otherwise specified by the instructor. For example, many instructors prefer single spacing for electronic submissions. Figure and table captions, the abstract, and the appendices may be single-spaced. The paper or report should be on single-sided 8.5- x 11-inch paper (or should be formatted in this manner in an electronic submission). With the exception of tables and figures (when appropriate), text should not be rendered in a landscape format. The report shall have a one-inch margin (i.e., 2.54 cm) at the top, bottom, and right-hand side of each page, and a 1.5-inch (i.e., 3.81 cm) margin on the left-hand side of each page.
- ❑ A legible and readable typeface and font should be used. In most cases, this should be 12 pt. Times New Roman, which is a default font on many word processing programs.
- ❑ Any figures, charts, graphs, tables, or other visual materials should be properly identified including a caption and documentation, if the material contained in the visual was obtained through research. Caption and documentation should appear below the visual. All visual material must be clear and legible.
- ❑ Footnotes should have the first line indented, and bibliographic entries should have hanging indents.

Writing Mechanics

- ❑ Research reports will be written using a formal style. With a formal style, personal pronouns, contractions, abbreviations, jargon, clichés, and colloquialisms are not used.
- ❑ For comprehension, care should be taken with the use of commas. In particular, commas should be used to separate a series of items, including placing a comma before an “and” or similar connective word.
- ❑ Punctuation should appear inside quote marks, not outside them.
- ❑ When two or more words are used to modify a noun, then those words should be hyphenated, i.e., cross-functional teams.
- ❑ Headings should be used to separate major topic areas of a report
- ❑ Acronyms should be properly defined with the acronym, in parenthesis, following the complete phrase the first time it is used
- ❑ Numbers should be spelled out if less than 10, with numerals used for 10 and above. In no instance should a numeral begin sentence.
- ❑ Writing should avoid gender-specific pronouns unless referring to a specific person.
- ❑ Avoid “there is” and “there are” sentence construction.
- ❑ Avoid use of vague modifiers (very, extremely)
- ❑ All written reports should be at the graduate level reflecting critical and creative thinking with some application. Generalizations and comments without sources must be avoided.
- ❑ The written narrative should present a clear flow of ideas and logically support conclusions, a summary, and any future research or area of study.