Research & Documentation Handout

This handout will be helpful for those who are new to business research as well as more experienced researchers who need a quick “how to” reference.

We’ve provided you with information on conducting basic research, integrating sources into your writing, and using APA style documentation to correctly cite sources that you have used in your work.

To efficiently find the information you’re looking for, use this table:

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I. Research Basics

Four Stages of a Research Project

1. Define the research question.
   What am I looking for?
2. Find the information.
   Where can I find answers to my questions?
3. Evaluate the information.
   How do I know the answers I’ve found are correct?
4. Incorporate the information.
   How should I use this information in my project?
   What type of documentation must I do to avoid plagiarism?
CARS Checklist for Research Source Evaluation

| Credibility          | • Is this information from a trustworthy source?  
|                      | • What are the author’s credentials? Is there evidence of quality control?  
|                      | • Is the author a known or respected authority?  
|                      | • Is there organizational support for this work?  
|                      | **Goal**: an authoritative source that supplies some good evidence that allows you to trust it |
| Accuracy             | • Is the information up to date, factual, detailed, exact, and comprehensive?  
|                      | **Goal**: a source that is correct today (not yesterday), a source that gives the whole truth |
| Reasonableness       | • Is the account fair, balanced, objective, and reasoned?  
|                      | • Are there any conflicts of interest?  
|                      | • Is it free of fallacies or slanted tone?  
|                      | **Goal**: a source that engages the subject thoughtfully and reasonably, a source concerned with the truth |
| Support              | • Are supporting sources listed? Is there contact information?  
|                      | • Are sources available that corroborate the information?  
|                      | • Are all claims supported and is documentation supplied?  
|                      | **Goal**: a source that provides convincing evidence for the claims made, a source you can triangulate (find at least two other sources that support it) |

Resources for Research and Documentation


II. Integrating Sources

Below we identify two methods for integrating your sources: direct quotations and paraphrases. When done appropriately, either method is acceptable. Remember, however, that your research should function in a supporting role to your ideas – not the other way around.

Quotations: Using the Words of Others

What is a direct quotation and how do I incorporate one?

- A direct quotation is when you copy exactly the words of an author from the original source into your own document.

- Whenever you directly quote the words of an author, you must give the author credit and indicate that the quotation is taken verbatim from an outside source. You place direct quotations in quotation marks (") unless the quotation runs more than four lines. In those cases, the quotation is set apart from the rest of your text by indenting it. Refer to the style guides on page two for answers to specific questions related to quoting authors.

- A quotation is always followed by a reference that indicates the source; this either takes the form of a parenthetical citation, a footnote, or an endnote number, depending on the style format you are using.

Why should you incorporate direct quotations?

A direct quotation is most appropriate when how the author states an idea is the clearest and most effective way of communicating the idea. Direct quotations work effectively to:

- emphasize a point you've made
- provide an example
- show an author's intention
- show how historical figures spoke or thought

Does it matter how long the quotation is?

Yes, for two reasons. First, you want your research to play a supporting role to your original ideas, so get the quotation down to the shortest and clearest chunk possible. The overuse of long quotations may give readers the impression that you cannot think for yourself.

Second, the length of your quotation – short versus long -- determines format.

- Short quotations consist of four lines or fewer and are set off with quotation marks. There should be a smooth transition between your words and the quotation.
- Long quotations are four lines or more and are usually set off from the text in a block format with no quotation marks.
Also keep in mind that different documentation styles have different formats for long quotations. The three most frequently used documentation styles (APA, MLA, and Chicago/Turabian) have the following format requirements:

- **APA**: For quotes longer than 40 words, indent five spaces, and double-space within the quotation. Consult the APA's *Publication Manual* for additional help.

- **MLA**: End the last sentence before the quotation with a colon, which indicates the continuation of your sentence. For quotations of more than four typed lines, indent ten spaces from the left margin, and double-space within the quote. Consult the *MLA Handbook* for additional help.

- **Chicago/Turabian**: For quotes that run two or more sentences and four or more typed lines, indent four spaces from the left margin and single-space within the quote (Turabian calls these "block quotes"). Consult Turabian's *A Manual for Writers* or *The Chicago Manual of Style* for additional help.

**Strategies for Effectively Integrating Quotations into Your Text**

By integrating quotations smoothly into your paper, you allow the reader to easily move from the source information to your own thoughts. If quotations are simply dropped into a paper without signaling to the reader the context of the quoted material, a reader may become confused and not understand the appropriateness or relevance of that particular quotation.

- **Weak integration of a quotation**:

  The men in Stephen Crane's short story, "The Open Boat," are courageous; they want to live. "The idealistic virtues of bravery, fortitude, and integrity possess no meaning in a universe that denies the importance of man" (Stein 151). The ideals of their native environment, then, mean little when confronted with the harshness of the open ocean. These men finally realize that it is possible they will die.

- **Better integration of a quotation**:

  The men in Stephen Crane's short story, "The Open Boat," are courageous; they want to live. As critic William Bysshe Stein points out, however, "the idealistic virtues of bravery, fortitude, and integrity possess no meaning in a universe that denies the importance of man" (151). The ideals of their native environment, then, mean little when confronted with the harshness of the open ocean. These men finally realize that it is possible they will die.

Notice how introducing the quotation with the author's name or the source from which it comes signals to the reader that the material is a quotation.
Effective writers use a variety of words and phrases to make their writing more readable. Below are suggestions to help you achieve this variety when introducing quotations.

1. Signal direct quotations in an interesting manner by varying the way they are incorporated into your text. For example, you could use any one of the following signal phrases:

   - According to Jane Doe, "...
   - As Jane Doe goes on to explain, "...
   - Characterized by John Doe, the society is "...
   - As one critic points out, "...
   - John Doe believes that "...
   - Jane Doe claims that "...
   - In the words of John Doe, "...

2. Use a variety of verbs in your signal phrase. Don’t over-rely on stock verbs such as “states” or “says.” Think about the purpose of your quotations and choose a verb accordingly. Below is a list of possible verbs for use in the introduction of quotations.

   As you use this list keep in mind that there are fine shades of meaning between phrases such as "contend" and "argue" and large differences between ones such as "claim" and "demonstrate." Be sure to choose a verb that accurately reflects the source’s purpose.

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Pitfalls to Avoid in Using Direct Quotations

While incorporating other researchers’ findings into your own writing can build the credibility of your argument, do so wisely.

- Don't overuse quotations; use them only to emphasize a point or support your argument.
- Avoid long quotations when a short one will suffice.
- Don't take quotations out of context to misrepresent the original author's opinion. Read the entire source carefully to ensure that you understand its meaning.
- Be certain you understand any technical terms the author uses.
- Always introduce your quotations, but avoid boring, stock introductions.
- Use a variety of sources; don’t over-quote a single source.
- Don’t rely exclusively on direct quotations as the only way to integrate your source materials.
- Use paraphrases (discussed in the next section of this handout) in addition to direct quotes.

Paraphrase: Putting Others’ Ideas into Your Own Words

What is a paraphrase?

- A paraphrase restates an author's ideas in your own words, using your own sentence structure and vocabulary. It is one way that you can incorporate source materials into the text of your paper.
- Like direct quotations, the source of the paraphrase must be documented; that is, the original author must be given credit for her/his ideas in the form of a footnote, endnote, or parenthetical citation. Failure to document a paraphrase is plagiarism.
- A paraphrase differs from a summary in that it is more detailed. A summary will normally focus on the main idea of a book or article and restate it in general terms, but a paraphrase focuses in on a specific idea or passage.

Why should you use paraphrase?

- To help you grasp the full meaning of the original ideas or sources.
- To lend proof or credibility to your paper.
- To avoid overusing quotations in your text.
- To provide examples of two or more points of view on a subject.
- To add more depth to your writing.
Strategies for Writing Effective Paraphrases

Accurately and effectively paraphrasing may take some practice on your part. Use the following strategies to develop your skill in this area.

1. Reread the original passage until you understand its full meaning. To do this, ask yourself the following questions:
   
   a. What is the main idea of the sentence or passage?
   b. Which parts of the sentence or passage give additional information concerning its main idea?
   c. What are the meanings of unfamiliar words? Use a dictionary if necessary.

   Once you understand the full meaning of the passage, put it away and write your paraphrase. Not looking at the original text as you write your paraphrase can help steer you away from inadvertent plagiarism.

2. Merely changing a word or two is not a legitimate paraphrase, so you should use a variety of approaches to write an acceptable one.

   a. Use synonyms.
      
      • Come up with words from your own vocabulary that are as close to the meaning of the original words as possible.
      • Compare the dictionary definitions of the original words with your synonyms. If the definitions do not correspond, come up with new synonyms.
      • Reread the original passage with the new words in place. See if it makes sense. If it changes the meaning of the original idea, then you will have to come up with new synonyms.

   b. Change the pattern of the sentence without altering its meaning.

   c. Change the order of ideas when two or more ideas are expressed in the original sentence.

   d. Break long sentences into shorter ones.

   e. Make abstract statements more concrete.

   f. When you have a complete paraphrase, ask yourself the following questions:
      
      • Does the altered sentence have the same meaning as the original?
      • Will the meaning be clear to your reader?
      • Does the style of the paraphrase fit smoothly into your own text?
Have you combined strategies to develop your paraphrase and avoid plagiarism?

Paraphrasing example from Purdue’s OWL website:

The original passage:

Students frequently overuse direct quotation in taking notes, and as a result they overuse quotations in the final [research] paper. Probably only about 10% of your final manuscript should appear as directly quoted matter. Therefore, you should strive to limit the amount of exact transcribing of source materials while taking notes. Lester, James D. Writing Research Papers. 2nd ed. (1976): 46-47.

A legitimate paraphrase:

In research papers students often quote excessively, failing to keep quoted material down to a desirable level. Since the problem usually originates during note taking, it is essential to minimize the material recorded verbatim (Lester 46-47).

An acceptable summary:

Students should take just a few notes in direct quotation from sources to help minimize the amount of quoted material in a research paper (Lester 46-47).

A plagiarized version:

Students often use too many direct quotations when they take notes, resulting in too many of them in the final research paper. In fact, probably only about 10% of the final copy should consist of directly quoted material. So it is important to limit the amount of source material copied while taking notes.

Pitfalls to avoid in paraphrasing

• Misreading or not fully understanding the original text
• Including too much of the original source material without altering it
• Leaving out important information
• Adding your opinion within the paraphrase
• Summarizing rather than paraphrasing
• Substituting inappropriate synonyms
• Expanding or narrowing the meaning
• Forgetting to document your sources (a form of plagiarism)

Adapted from:


III. APA Style & Reference Page

The following section will help you understand and implement the American Psychological Association (APA) style of citation into your own research and reports. Below you can find an overview of the APA style along with explanations and examples for properly including in-text documentation of outside sources and creating a correct APA references page.

APA Style Overview

• The document should be typed, double-spaced, and in Times New Roman font.
• You should use uniform margins of one inch at the top, bottom, right, and left of every page.
• All pages should be numbered consecutively throughout the paper.
• The title page should be included in the page count but should not have a numeral appear on the page.
• Numbers, whether Roman (e.g. I, II, III) for prefatory matter like a table of contents or Arabic (e.g. 1, 2, 3) for the body of the text should appear from the second page forward.
• Starting with the second page, each page should also have a running head, consisting of the first two or three words of the title, located in the upper right corner in front of the page number.

Review the examples of APA document pages below.

Title Page: When the title of the document is on a separate page, it should have the title and the author’s name centered horizontally and vertically.

Academic assignments should also include the course designation, the name of the instructor, and the date

Abstracts: An abstract follows the title page and is a brief summary of your paper that provides readers with a quick survey of its contents. The abstract is also used by information services to index and retrieve articles. Check with your instructor to see if an abstract is required.

Body Text: Repeat the title, centered, at the top of the first page of text. Begin using a running head and page number in the upper right corner. Start the first paragraph of text below the title.
For academic papers, your instructor may also want you to add your name and the course designation to all pages of the document.

**References:** The complete citations for all your reference sources should be listed on the “References” page(s) at the end of the paper. Use a hanging indent format for each entry – the second line of the entry should be indented five spaces.

**Documenting Sources**

In academic writing, everything taken from an outside source must be documented, including ideas and information as well as directly quoted material and paraphrases. In the U.S. academic tradition, the origin of all outside material, such as books, magazines, Internet, documents, interviews, and other personal communications, must be clearly and explicitly acknowledged.

In APA format, you are required to document your sources both within the text of your paper and at the end of your document with a References page. Following we provide examples for both in-text and Reference page citations. For more examples, please consult the *Publication Manual of the American Psychological Association* (6th ed.).

**In-text Source Documentation**

In-text citations identify source materials at the point where they appear in your text. Also known as parenthetical citations, these brief entries enable your readers to locate complete information about the sources in the References section at the end of your text. APA uses the author-date method of citation: enclosed in parentheses at the end of the material are the author’s last name, followed by a comma and then the year of publication. When you have incorporated a direct quotation from a source, follow the publication year with a specific page reference or paragraph number if no page numbers are provided (as is the case with some electronic material).

**Examples**

1. *When you use the author’s material but do not mention her or his name in the text:*

   Early onset results in a more persistent and severe course (Kessler, 2003).

2. *When you mention the author’s name in the text:*

   Kessler (2003) found that early onset results in a more persistent and severe course.
3. **When a work has two authors:**

   According to a recent study, entrepreneurs in cities with populations exceeding 250,000 people… (Jones & Preston, 2009).

4. **When a work has three, four, or five authors, cite all authors for the first reference but then only the first author followed by “et al” after that:**

   According to Gurgan, Kernis, and Smith (2007)….
   Additionally, Gurgan et al. (2007) point out….

5. **When citing two or more sources by different authors, place them in the same parentheses alphabetically, separated by a semi-colon:**

   Two studies indicate the feasibility of a joint venture (Clank, 2006; Dross 2007).

6. **When the work does not specify an author, begin the citation with the word (usually the title of the work) by which it’s alphabetized in the References section:**

   In the book *College Bound Seniors* (2008)…

7. **Personal communication (letters, memos, interviews, telephone conversations or e-mail) are only cited within the text, not in the References section, because your audience does not have access to these documents:**

   Dr. Kaczmarek (personal communication, April 18, 2010) indicates that…

8. **When you insert a direct quotation:**

   According to a leading researcher in business communication, “Interpersonal and procedural comments reduce the tension that always exists in a new group” (Locker, 2000, p. 338).

   --or--

   Locker (2000) suggests that members of newly-formed work teams exchange social comments and explicitly discuss meeting procedures to “reduce the tension that always exists in a new group” (p. 338).
Reference Page

This page comes at the end of the paper and contains an alphabetical listing of all sources cited in the text. In other documentation systems, like MLA for example, this section may be called a “Bibliography” or “Works Cited” list, but in the APA system it is always labeled “References.”

APA style uses the double-spaced, hanging indent format seen in the examples below, and the general sequence of an entry in APA style is author, date, title, and then publication information.

Capitalization and the use of quotation marks and italics here may differ from what you are accustomed to. Pay close attention!

- For articles and book chapters, capitalize the first letter of the title only and do not enclose in quotation marks.
- For titles of major works such as books and non-periodicals, capitalize the first letter of the title only and italicize the entire title.
- For periodicals (journal titles, for example), capitalize the first letter of all major words in the title and italicize the entire title.

Electronic Sources on Your Reference Page

Electronic sources require special attention so that your audience can readily trace the path to finding your listed source. In general, the APA recommends “that you include the same elements, in the same order, as you would for a reference to a fixed-media source and add as much electronic retrieval information as needed for others to locate sources you cited” (VandenBos, 2010, p. 187).

Most people realize that you should include the URL of an electronic source in citations, but you may be less familiar with the newer digital object identifier (DOI) system. Most often used for electronic journal articles (but sometimes in the print version, as well), the DOI “is a unique alphanumeric string assigned...to identify content and provide a persistent link to its location on the Internet” (VandenBos, 2010, p. 189). A sample DOI would look like this: 10.1037/0278-7393.34.3.439 (preceded by the acronym DOI). When available, always include the DOI in your reference citations. By including the DOI, no other retrieval information, such as a website or database, is necessary.

Unlike other documentation systems you may have previously used, APA does not suggest including database information (e.g., Business Source Premier) because database content changes periodically. Retrieval dates are also unnecessary “unless the source material may change over time (e.g., Wikis)” (VandenBos, 2010, p. 192).

Use the following examples as guides when you compose your own APA reference page. You can also consult the Publication Manual of the American Psychological Association (6th ed.) for more examples.
Examples

Periodicals

1. Journal article, DOI available:


2. Journal article, DOI not available:


3. Magazine article:


4. Online magazine article:


5. Newspaper article:


6. Online newspaper article:

Books

7. Reference book:

8. Entry in online reference work:

9. Book, print version:

10. Book, electronic version of print version:

11. Book chapter, print version:
Technical and Research Reports

12. Government Report, corporate author:

13. Nongovernmental organizational report:
   UCM_303569_Article.jsp

Digital Media

14. Blog post

15. Video

16. Podcast
Some examples adapted from:


resource/560/01/
