

Report writing and Style Guide

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INTRODUCTION

Writing is a different mode of communication from speech. Business writing, even while studying it, needs to be concise, precise, and free from literary enhancements. People who read business reports would like to find the substantive information it quickly.

Additionally, the references used in researching the paper or the report need to be properly cited. Several styles organize the methods of citation and other matters of style into accepted forms of writing. This document will explain the writing and citation style to use in the courses I teach. In principle, it follows the Chicago Style of Citations, explained in much detail in the classic by Kate L. Turabian, *A Manual for Writers of Term Papers, Theses, and Dissertations*.

Using the information presented in this document is mandatory in my courses and will likely produce better looking, more professional documents at least in the way they look. The companion document to the one you are reading, “Typewriter Days: A Bygone Era that Won’t Go Away” explains issues related to formatting in detail.

Another topic that deserves a particular attention is plagiarism. It is one of the most serious breaches of academic integrity and you must learn what it is and

how to avoid it. Frequently, students plagiarize because they do not know what it is and how to recognize it. Read the section about plagiarism to learn how to recognize and avoid it in your writing. My plagiarism policy clearly states what actions I will take if I notice any breach of academic integrity.

WRITING AS A COMMUNICATION TOOL

Writing is an attempt to communicate. Communication requires an idea, a message to share. Efforts to communicate will fail if the readers do not get your idea. Also, remember that good writing takes time. Writing a finished paper in one pass or even two has an extremely low likelihood. Good writing requires good editing. Start with a draft copy and revise it to convey your idea clearly and concisely. This will take many passes through the paper to remove chaff and make it convey your ideas and do so clearly. In my courses, all writing will be some form of business reports, which do not need fancy words to appear impressive. Content and clarity of the presentation impress readers much more than the number of fancy words and long sentences.

Writing a research paper

Daily language uses the term “research” rather loosely. Simply finding articles, books, and Internet resources on the subject are not what research is all about. Everything you find need to go through substantial mental processing for your research to be complete. Insufficient time devoted to researching information, will

result in a collection of quotations strung sequentially without presenting any particular idea.

Good research starts with a purpose and an intended audience. The topic under study needs to be a compelling one, at least to its author. Personal interest and curiosity, desire to know more about the subject, and commitment to doing an excellent job will collectively fuel this kind of work.

Establishing a research question and a hypothesis

The mere existence of a broadly defined subject is not sufficient for writing a paper. Through research, the initial idea may turn into a question. “Payment facilitation on the Internet” may be an interesting subject but it does not lend itself for a thorough analysis as it stands. Further research may change it to “payment facilitation on the Internet as a marketing tool,” which may appear more tightly focused but still needs refinement. Additional reading may raise the question “what forms of payment facilitation is more suitable for marketing and retailing services on the Internet?” Now, this is only one of many questions that may emerge from different research interests and resources, and from different minds. Whatever the focus, the research question may also suggest one or several hypotheses as the proposed answers. One such hypothesis in the above example may be “an intermediary is more suited for retailing services on the Internet than direct payment to the vendor.” (Keep in mind that these are merely examples and

should not be construed as the result of prior research. In fact, these questions and hypotheses are likely incorrect since they are not based on research.)

Additional research is still necessary to follow through on this track to solidify the position and make the transition to a central thesis.

A central thesis

Through additional research and analysis, a central idea, a thesis emerges that will provide answers to the research question. Following the above fictitious examples, research may reveal “an underlying trust layer is necessary to facilitate transactions involving the sale of service on the Internet.” (This too is very arbitrary and serves only as an example. In all likelihood, it is not correct.) From the formation of the thesis on, throughout the remainder of research and writing the report, this thesis must be in sight at all times.

Do not even consider writing without a thesis for it is like building a house without a skeletal structure. As such, a house would buckle under the weight of each additional layer of material; a paper without a thesis will be the representation of limp idea.

Library research will help greatly, both before and after a fully formed thesis emerges. Subsequent research and reading will mold and shape this thesis and

allow its clear presentation. A fully formed thesis will need additional research to find supporting evidence to strengthen and make it less fragile.

Analysis

Through the “research” process, the central idea is broken into smaller parts for purposes of understanding them, and thus, the whole, better. This is the analysis part. Depending on the subject, special analytical tools may be necessary.

Whatever the tool and the method, the main idea behind analysis is an effort to understand the granularity of the subject matter. This also provides an understanding of potentially many relationships among its components and the forces shaping and affecting the idea.

Yet, the research is still not finished.

Synthesis

Equipped with a good understanding of the subject matter and the forces shaping and affecting it, the researcher can support the main thesis through using the acquired knowledge as glue that holds the paper around the thesis. This synthesis part brings a closure to the research process. The synthesis will be the culmination of all the major points into a cohesive whole. What has become granular through analysis will become a whole again. We grind the wheat to make flour (analysis) then mix flour with other ingredients to make bread (synthesis.) Likewise, we

break information into granular parts so that we develop a better understanding of it (analysis) and then bring our knowledge with additional materials together to present our thesis (synthesis.)

The audience

Knowing the audience before writing the report will help produce the most suitable one. Writing for a daily paper is different from writing for a scholarly journal, which in turn, is different from writing a paper to fulfill the requirements of a course. Different types of publications have different audiences, which relate to different words and usage, have its own writing requirements, and adhere to different deadline schedules. In short, writing style should fully consider the needs of the audience who will see to the finished work.

ISSUES OF STYLE

Extensive research will result in a paper with parts that come from various sources. To clarify what part comes from different sources, proper references must identify direct quotations, paraphrases and other information. The method of referencing and documenting sources varies from discipline to discipline and from publication to publication. However, they all share the need to show the source of material that does not come from your own mind and is not your original writing.

Chicago style of documentation

In marketing, many use the Chicago style of documenting sources, which I will outline in this section. Do not think for a moment that this is an extensive source on the Chicago Style, far from it. I am neither an authority on Chicago style nor an English professor. I will only attempt here to present as much of the Chicago style of documenting as will be necessary for writing in my courses. Also, note that Chicago style does not refer to the writing style. It focuses on documenting citations and writing the references section. That is all.

In-text citations

Superscript numbers reference the citations in the text. The numbers go up sequentially throughout the document and they appear close to the text that needs referencing. The number goes immediately after any punctuation marks if any with no spaces before it. A citation from a source that is a better authority on this than I, can better explain this. “The place in the text where a note is introduced, whether footnote or endnote, reference or content, is marked with an Arabic numeral typed slightly above the line (superscript.)”¹ Note that a pair of quotation marks surrounds the sentence since I took it from her book.

In the note

In the note, the format of citation is as shown at the bottom of this page. A short separator line precedes the footnote. The first line of the footnote has the same amount of indentation as the paragraph indentation. The footnote number in normal type starts the paragraph followed by a period and one space. The remainder of the note has no underlined parts. Some elements may be in italics or in double-quotation marks but never underlined.

1. Kate L. Turabian, *A Manual for Writers of Term Paper, Theses, and Dissertations*, 6th ed. (Chicago: University of Chicago Press, 1996), 120.

Book with one author

1. Don A. Dillman, *Mail and Internet Surveys: The Tailored Design Method*, 2nd ed., (New York: John Wiley & Sons, Inc., 2000), 245.

Note that the name is in its natural sequence, a comma separates the elements, the title of the book is italicized, and the publisher information is in parentheses. This example also illustrates how to handle editions other than the original. The designation, here 2nd edition, immediately follows the title of the book.

Book with more than one author

2. Janice M. King, Paul Knight, and James H. Mason, *Web Marketing Cookbook*, (New York: John Wiley & Sons, Inc., 1997), 170-171.

If the above book had only two authors, only “and” would have separated their names without commas. When more than two authors exist, their names must be separated with commas and “and” after the comma between the last two authors as shown above. Note the range of pages referenced in this example rather than a single page.

Book with an editor

When referencing a book, an anthology, a collection edited by one person without referring to a particular piece in it, the content and the format of the note are similar to that of a book with one author. The exception is the “ed.,” that follows the name. For example:

3. A. Cemal Ekin, ed., *Perspectives: Marketing on the Internet*, (St. Paul: Coursewise Publishing, Inc., 1997), 2.

If the citation refers to an article in the collection, then the note will look different.

4. “Tremble Everyone,” in, *Perspectives: Marketing on the Internet*, ed., A. Cemal Ekin, (St. Paul: Coursewise Publishing, Inc., 1997), 5.

Here, the actual reference is to the article “Tremble Everyone” and it is in the indicated book, edited by the person shown.

A journal article

When citing a journal article, the author’s name or authors’ names appear in natural order as in a book, followed by the title of the article in quotation marks. The title of the publication is italicized and publication location is omitted. A hypothetical example may look like the following.

5. Daniel Horne, “Use of Gift Certificates in Healthcare Industry,” *HCM* 131 (June-July 1998): 567.

5. Daniel Horne, “Use of Gift Certificates in Healthcare Industry,” *HCM* 131, no. 4: 567.

Note that the title of the article is not in italics and a colon separates the issue, here June-July 1998, and the page number. The first example refers to a particular issue by its date and the second by its issue number. In either case, no abbreviation such as “vol.” precedes the volume number, 131.

Some publishers number the pages of their journals sequentially throughout the year or volume (which is the case in the above example) and others use page numbers for each issue starting with one. If we want to rewrite the above example

and refer to the second kind of journal, the fictitious example would look as follows.

5. Daniel Horne, "Use of Gift Certificates in Healthcare Industry," *Journal of Healthcare Marketing* 21 (1998): 45.

A magazine article

When referencing to a magazine of general interest, the note omits the publisher and the publication place, and the cover date identifies the issue rather than a volume and issue number set. A comma separates the date information from the publication name.

6. Randal L. Schwartz, "Pushing Back on Y2K," *Web Techniques*, July 1999, 34.

A newspaper article

Although a publication date is sufficient to identify a newspaper, for most metropolitan dailies a section label will be necessary. Most of these papers contain multiple sections paginated individually.

7. Dave Barry, "Any Pro Could Pen a Potter; Here's One for You Right Now," *The Providence Sunday Journal*, 13 August 2000, sec. D, p. 2.

Internet sources in general

Citing Internet sources has become an issue only recently and due to their unique nature, slight modifications of the standards are necessary. These will have the general form as shown below.

8. Name M. Last, "Title of the Article," Date of publication if any, or n.d. for no date, <Fully qualified URL in angle brackets> (Date of access).

WWW Site

Following the above general guidelines for citing Internet sources, a sample citation will look like as follows.

9. John Simmons, "The Hand That Rocks The Net" *The Industry Standard*, July 31, 2000, <<http://www.thestandard.com/article/display/0,1151,17125,00.html>> (14 August 2000).

In this example, all the elements are present. Not all articles are this clearly identified. The material may not have an author or the identity of the Web site may not be as clear as in the above example. The note will skip the parts, most notably the author's name, if the article does not specify them. Always try to identify minimally the title of the page (which is at least visible on the title bar of your browser), the full URL (not just www.whatever.com) and the date of your viewing it. These are the essentials of citing a Web site in the notes section.

In choosing a Web site to use as a reference, we need to be very critical of its content. In print media, editorial clues, publication reputations built over time, and other established criteria help us to assess the quality and the credibility of the source. Since publishing on the Web is extremely simple, finding hundreds, if not thousands or even millions of sites is likely after a search. Before using them in research, their credibility and suitability need to be determined.

Subsequent reference to a source after its first citing

Some sources appear more than once in one paper. In such cases, rewriting the full citation every time is not necessary. A source may come sequentially with no other intervening notes. Then the note will look like:

10. Ibid., 45

If other notes have come in between the first and subsequent citing of a source, then the note uses an abbreviated reference. See the following example:

11. Dillman, Mail and Internet Surveys, 135.

Note that only the author's last name and an abbreviated title of the book appear in the note with no reference to its publication information.

Bibliographic entries and the references section

A section called references, works cited, or bibliography will contain all the sources used and referenced in the report. These bibliographic entries differ from footnotes in significant ways. The most important difference that will not be apparent in the examples below is that the bibliographic entries appear alphabetically ordered by the last name of the author. Although the following examples will indicate the rest of these differences, the general format of a bibliographic entry is as follows.

Last, First MI. Title of the publication. Location: Publisher, Date.

Note, in contrast to the format of a footnote, the order of the authors' name, periods separating the sections, the lack of parentheses surrounding the publication information, and no page reference. Additionally, no reference numbers are preceding the entries, and the first line of the entry is flush with the left margin while the subsequent lines have indented margins to the first tab stop in line with the paragraph indents. Specific entry formats are below.

Book with one author

Dillman, Don A. *Mail and Internet Surveys: The Tailored Design Method*, 2nd ed.
New York: John Wiley & Sons, Inc., 2000.

Book with more than one author

King, Janice M., Knight, Paul, and Mason, James H. *Web Marketing Cookbook*.
New York: John Wiley & Sons, Inc., 1997.

Book with an editor

Ekin, A. Cemal, ed. *Perspectives: Marketing on the Internet*. St. Paul: Coursewise Publishing, Inc., 1997.

Reference to a selection in a collection

“Tremble Everyone.” In *Perspectives: Marketing on the Internet*, edited by A. Cemal Ekin, 3-5. St. Paul: Coursewise Publishing, Inc., 1997.

A journal article

An entry for a journal where the pages are numbered by the volume.

Horne, Daniel. "Use of Gift Certificates in Healthcare Industry." *HCM* 131 (1998): 564-569.

An entry for a journal where the pages are numbered by the issue.

Horne, Daniel. "Use of Gift Certificates in Healthcare Industry." *Journal of Healthcare Marketing* 8, no. 4 (1998): 42-47.

A magazine article

Schwartz, Randal L. "Pushing Back on Y2K." *Web Techniques*. July 1999, 34-36.

A newspaper article

Barry, Dave. "Any Pro Could Pen a Potter; Here's One for You Right Now." *The Providence Sunday Journal*, 13 August 2000, sec. D, p. 2.

WWW Site

Simmons, John. "The Hand That Rocks The Net." *The Industry Standard*, July 31, 2000. <<http://www.thestandard.com/article/display/0,1151,17125,00.html>> (14 August 2000).

PLAGIARISM

No matter the intent, presenting written or spoken word, or even an idea, that belongs to someone else as one's own is plagiarism. Some written words represent common knowledge and they are the exception to the rules of plagiarism. There is no reason to attribute "Warwick is a city in the State of Rhode Island" to any source. However, when mentioning its population, area or other statistics, citing its source is necessary because not everyone knows this kind of information.

Plagiarism is one of the most serious breeches of academic conduct and yet quite simple to commit. When students plagiarize, it may be due a few factors:

- Ignorance and not knowing how important it is
- Not knowing how to avoid it
- The ease of finding information on the Web and even easier method of copying and pasting this material into a paper in progress
- Pressure of the deadline due to procrastination presenting the irresistible temptation

Avoiding plagiarism does not mean that we must not look at other people's works, listen to what they say, or consider their ideas for inclusion in our work. Quite the

contrary, library research requires using many sources that help better understand the topic in hand. However, the finished paper, largely, must be the result of our understanding and analysis, expressed in our own words. When including material from other sources in your paper, as either direct quotations or a paraphrase, you must cite their rightful source, period.

Good library research requires not only finding relevant sources but using them properly as well. Avoiding plagiarism is both easy and a requirement of academic and professional life. In general, follow high ethical standards, avoid the temptation and do not postpone work until the last week, know what plagiarism is and how to recognize it, and learn the methods of avoiding it.

How to avoid plagiarism

- Make sure to write down the full bibliographic information of the publication when doing research and taking notes. If your notes will spill to several cards or pages, make sure that you identify the source on each piece of paper and note card. Clearly mark any part of the source if it is a direct quotation. Two weeks later remembering what part is personal note and what part is a direct quotation will be difficult.
- The purpose of reading and taking notes is to understand the research topic better, different perspectives on it, and perhaps conflicting theories about it. Not everything read, or has made its way to our notes needs to become a

part of the finished paper. The main idea behind this activity is to help us formulate our own thoughts. Do not only write down sound bites to sprinkle around the paper to give it a “scholarly” appearance for scholarly lies in the substance that stem from your own mind.

- Do not try to find quotations that seem to follow the same line of thought for stringing end-to-end to form long paragraphs. The reader would like to know what you, the author, think, not a journalistic presentation of who said what.
- Direct quotations or paraphrases are two ways of presenting others’ words. Use them carefully to avoid plagiarizing.
- When using a direct quotation, in the exact words of its author, always put it between double quotation marks, and immediately after, use a footnote to cite the source. It is not enough simply to use a citation. See the section about the style of the footnotes for proper formatting.
- Hiding copying by word substitution is plagiarism. If the result ends up saying substantially the same thing in the same way as the original author, it is plagiarism. If there is no other way, see the next tip.
- When paraphrasing to shorten long quotations, do not simply change a few words, or alter the sequence of a couple to create the illusion of paraphrasing. Rewrite the material to reflect what is in your mind. What

goes down on paper must reflect your understanding of the material and must represent what the author actually says. Try writing it without looking at the source or even your notes to reduce the influence of the original on the use of words and phrases. Remember, even when done properly, paraphrases must include a citation to its source in a footnote.

- Try limiting the use of quotations or paraphrases to establish the theory and the foundation structure of your paper. Using quotations and paraphrases that occupy 25-50 percent of each page is likely excessive. Write your paper with your words, support your words with those of others who may have established themselves as reliable sources and whose words may carry some weight on the subject matter.

Examples of plagiarism

(In these examples, the same footnote cites the same source several times to maintain the nature of the examples as if they appear in a section of a paper. Normally, these second and subsequent references would need a simple “Ibid.”) Here is a short paragraph taken from a magazine article that will serve as the base for the examples.

“Seattle-based Amazon is widely recognized as owning one of the better CRM (customer relationship management) systems among e-commerce companies.”²

Plagiarism by omitting the quotation marks

Seattle-based Amazon is widely recognized as owning one of the better CRM (customer relationship management) systems among e-commerce companies.³

Although correctly typed, same as the original, with a footnote citing its source, the above reference is a case of plagiarism since it does not appear between quotation marks. The reader has no way of knowing what part of the above sentence, or even the whole paragraph to which it may belong, represents exactly what the original author might have said. So, do not think that simply using a footnote saves this from being plagiarism.

Poor paraphrase, plagiarism with or without a citation

A Seattle company, Amazon is generally considered as having one of the finer CRM (customer relationship management) systems in all e-commerce firms.

2. Ephraim Schwartz, “Amazon, Toys ‘R’ Us in e-commerce tie-up,” *Infoworld*, 14 August 2000, 31.

3. Ephraim Schwartz, “Amazon, Toys ‘R’ Us in e-commerce tie-up,” *Infoworld*, 14 August 2000, 31.

This is almost identical to the original except a few synonyms replaced the words used in the original. This version says the same thing in almost identical way and is not acceptable form of paraphrasing.

Proper paraphrasing

Schwartz believes that a finely tuned customer relationship management system is one of the competitive strengths of Amazon, a Seattle company.⁴

The sentence opens with the author's name, the wording is very different without changing its substance, and a footnote shows its source. Collectively, they put the above clearly outside the territory of plagiarism. This is an example of how to paraphrase in situations where no suitable way of presenting the information, especially long segments of text, exists.

Incorrect wording

“A Seattle company, Amazon is generally considered as having one of the finer CRM (customer relationship management) systems in all e-commerce firms.”⁵

In this example, the quotation marks may make the statement appear as if the author used these exact words, which is not the case. This too is improper usage

4. Ephraim Schwartz, “Amazon, Toys ‘R’ Us in e-commerce tie-up,” *Infoworld*, 14 August 2000, 31.

5. Ephraim Schwartz, “Amazon, Toys ‘R’ Us in e-commerce tie-up,” *Infoworld*, 14 August 2000, 31.

and must be avoided. Strictly speaking, it is probably not plagiarism but it most likely violates the intellectual property rights of the author since he did not say it using these words. This is akin to photographing a painting, shifting its colors and passing it as an exact reproduction.