



GUIDE TO THE PREPARATION OF CASE STUDY

1.0 CASE STUDY FORMAT

Case writing and analysis provide an individual an opportunity for a vicarious living and learning experience that is relevant and productive for him or her when faced with the need to make difficult decisions in a logical, analytical, and professional manner. This section provides the format for writing and analyzing a case that will help a writer attain this experience.

A case study should contain three main divisions: the preliminary pages or front end; the text or main body is usually divided into: Part I – Case Description and Part II – Case Analysis; and the back end.

The preliminary pages or front end include elements such as the title page, dedication, acknowledgements or preface, declaration, table of contents, and lists of tables, figures and abbreviations.

The back end consists of references and appendices or annexes.

Table 1 is an example of how elements in a case study report from preliminary or front end to supplementary or back end are arranged. It is recommended that the example be used as a guide, although not every case study report will include all the items listed.

Table 1: Elements of a Case Study

	ITEM	REMARKS
1	Blank	Leaf
2	Title page	Not to be paginated but is counted as one (i). Subsequent pages are paginated and are numbered consecutively. Main sections are listed in the Table of Contents.
3	Dedication (if any)	This is optional. If included, it is not to be paginated or listed in Table of Contents but is counted as two (ii).
4	Executive Summary	Listed in the Table of Contents and given a small Roman page number.

5	Acknowledgements/ Preface	Also listed in the Table of Contents and given a small Roman page number
6	Declaration Form	To be signed by student and listed in the Table of Contents.
7	Table of Contents	Not listed in Table of Contents
8	List of Tables	Listed in Table of Contents
9	List of Figures	Listed in Table of Contents
10	List of Abbreviations or Glossary	Listed in Table of Contents
11	Main body (Part I and II)	To be paginated
12	References/ Bibliography	To be paginated
13	Appendices/ Annexes	First sheet to be counted but not paginated (Insert a leaf with only the word APPENDICES in the centre of the page, followed by the actual appendices which are paginated)
14	Blank	Leaf

1.1 Title Page

This page (see Appendix A), includes the following information:

- a) Full title of case study.
- b) Full name of author.
- c) Degree for which the case study is submitted.
- d) Name of the Graduate School of Management.
- e) Name of the Universiti Putra Malaysia; and
- f) Month and year of submission.

The title should describe the contents of the case study accurately and concisely, normally omitting words such as “An Investigation...”, “An Analysis...” which are redundant, as all case studies are investigations, analyses, or studies of one kind or another. It should be typed with single-spacing.

1.2 Executive Summary

The executive summary is a digest of the case and should be given the same careful attention as the main text. It includes a brief statement and explains the problem, i.e.,

- i) Problem statement
- ii) What was found
- iii) What the findings mean
- iv) What action management should take
- v) Conclusions
- vi) Recommendations

The executive summary normally should not exceed 350 words.

Acknowledgements or Preface. Acknowledgements or preface may contain all or some of the following information:

- i) Reasons for doing the study;
- ii) Acknowledgements of guidance and assistance from individuals and institutions;
- iii) If the case study is published, written permission to use any copyright or commercially sensitive materials.

Many authors prefer to have a section called ACKNOWLEDGEMENTS in place of a Preface. Whatever the title, this section can be written in the first person or the third person.

1.3 Declaration Form

The declaration form should read as follows:

DECLARATION

I hereby declare that the case study is based on my original work except for quotations and citations that have been duly acknowledged. I also declare it has not been previously or concurrently submitted for any other degree at UPM or other institution.

(signed)

NAME OF STUDENT

Date:

1.4 Table of Contents

The Table of Contents immediately follows the Acknowledgements. It lists in sequence, with corresponding page numbers, all relevant subdivisions of the case study, including the titles of sections, and subsections as appropriate in each Part; the references; the list of abbreviations and other functional parts of the whole case study; the appendices (if any); the index (if provided). A Table of Contents should *not* be listed in the Table of Contents itself!

1.5 List of Tables

This list consists of the exact titles or captions of all tables in the text and in the appendix, with the beginning page number for each.

1.6 List of Figures

This includes graphs, maps or figures or illustrations of other kinds. List the exact title or caption and its corresponding page number. Figures, including any in the appendix, should be numbered consecutively throughout the case study.

1.7 List of Abbreviations

If an assortment of abbreviations and acronyms (e.g. FAO, DOA, MARDI, PORIM, etc.) is used in the case study, it is best to give them their meanings in a List of Abbreviations , even though the full names are given at the first mention in the text. This list serves as ready reference to readers not familiar with the abbreviations, or reading part only of a case study. Universally recognized scientific symbols (°C, cm, mm, kg, ha, etc.) need not be listed.

1.8 Text of Case Study

1.8.1 Part I - Case Description / History

This part of a case study consists of the detailed descriptions of the company being studied. It usually supplies the situation context and the key problems and opportunities faced by the principal protagonists in the case. The case should reflect the real world by providing an over abundance of information and detail about a particular business situation. Most case write-ups contain two basic parts:

- a. the text; and
- b. the exhibits.

The main objective of these 2 parts is to provide the analyst with all the facts about the company to enable him or her to do the following:

- Analyze the problems or opportunities faced by the company based on the facts provided or assumptions made, or both.
- Identify alternative decision options or solutions.
- Evaluate and recommend the best decision option or solution from among the alternatives identified.
- Conclude the case.

Among the information useful for analyzing the case include, but do not limit yourself to, the following items:

- Prologue or scenario of certain conversations between various parties in the company

- Company background
- Mission, strategies, and objectives of the company
- Financial data such as balance sheets, income statement of sources and applications of funds, cash flow statements
- Specific information from various functional areas of company such as marketing, human resource management, productions and operations, finance, accounting, and so on
- Other relevant data presented in the forms of tables, figures, photos, flow charts, drawings, and so on
- Quantitative and qualitative data

It should be **stressed** here that, whatever information is used in Part II of the case study must be based mostly on the facts given in Part I of the case study. Other required information not found in Part I could be stated in the form of **assumptions**.

1.8.2 Part II – Case Analysis

The purpose of this section is to outline a simple but effective approach to case analysis regardless of the specific strategies employed in solving the case. This approach has three steps:

- a. Determine the key case issues and case positioning (i.e. why you chose to analyze the company).
- b. Determine the main alternatives regarding the case situation and key issues.
- c. Determine how to focus your analysis (i.e. select the appropriate tools and facts needed to support your recommendation).

There are many specific techniques and approaches to case analysis. Differences in analytical approaches relate to the broad kind of case you are dealing with. However, there are some similarities. One general rule to keep in mind is the identification of alternative courses of action. You may even wish to form certain opinions about these alternatives. However, never forget that effective case analysis means providing support for your final position or opinion.

You may or may not analyze all the alternatives. However, whatever opinion you form or recommendation you present, it must be supported, mostly with facts drawn from the case (i.e. from Part I of the case write-up) or even perhaps your own experience.

The determination of some focus for your analysis is a critical step. Good case analysts are always asking what the pertinent facts for analysis are, what the relevant numbers that should be pushed are. Good case analysts go beyond identifying the relevant facts and numbers which are given in the case. Rather they ask what the facts and numbers are that they need to analyze a particular issue or alternative regardless of what they think is given in the case. In other words, a good case analyst is ready and willing to make creative assumptions.

Many students, especially those without prior management experience, feel such "assuming" is unrealistic and not representative of "the real world of business." As any experienced manager will tell you, such creative "assuming" frequently occurs because managers rarely have all the information required to make a decision, nor the time and money to acquire the missing information. A fundamental problem of life is that decisions must almost always be made with incomplete and often imprecise data.

There are several ways to report on a case analysis. A case analysis may include a "Statement of the Problem", "A Summary of the Pertinent Facts and Assumptions", "Analysis of Alternative Solutions", "Decision, Choice or Recommendations", and "Conclusions." Sometimes one or more of these categories may be sub-divided. Consider the "analysis" section. A problem can be analyzed in terms of the "internal" or "external" environment. For example, a company may have a specific problem with sales loss. This loss could be the result of poor sales management, insufficient number of sales persons, or poor marketing. Such problems would be considered internal problems. If sales have dropped because the competition has a better advertising campaign for a similar product or there is a shortage of supplies, the company has an "external" problem. These are factors outside the company or in the "external environment" which influence the success of the company.

Each category of a case analysis (Part II) report is listed and explained below.

Statement of the Problem

State in two or three sentences the problems or the opportunities which existed in the case.

Summary of the Pertinent Facts and Assumptions

Briefly summarize the facts in the case. Assume the role of the consultant who has gathered the facts and must present them to a specific person or group.

Analysis of Alternative Solutions

Analysis often is the most difficult section of a report. Sometimes there is a fine line between summary and analysis, and analysis and recommendation. Using the facts gathered and assumptions made, you should be able to provide a list of possible alternative solutions or steps you could follow to take advantage of the opportunity that has arisen. In your analysis, you may discuss the causes of the problem as well as the impact of the problem on the company. There are many analytical tools and techniques that you can use for analyzing the case. Among others, these techniques include ratio analysis, breakeven analysis, decision tree, PERT/CPM network, SWOP, IFAS, EFAS and so on.

This section of your case report is important because you are evaluating the problems or opportunities so that you can make a recommendation or present a plan to rectify the problems or take advantage of the opportunities.

Decision, Choice or Recommendation

In this section you provide direction. By examining each of the alternatives as described above, including their advantages and disadvantages, you should be able to decide on the best alternative to recommend to the company.

The recommendation section is your “argument”. Using the facts of the case and your analysis, you “argue” that certain steps must be taken.

Conclusion

Use this section for any concluding remarks that you may want to make to the company. You will not need to create this section if you have made concluding remarks in your recommendations.

1.8.3 Note on Last Paragraphs

The last paragraph of any page should comprise at least two lines of text. Similarly, any heading appearing near the bottom of a page should be followed by at least two lines of text on the same page. If this cannot be done, bring them to the next page, including the heading concerned. Your computer will do this automatically if you can set it to “widow control”.

If the last paragraph of a page has to be continued on the following page, make sure that the new page contains at least one full line of text belonging to the last paragraph. In other words, the first line on the new page must not seem to appear like a heading, as would happen if it contains only one word or a short phrase. If this cannot be done, bring forward the last line from the previous page, provided this does not violate the requirement mentioned in the first paragraph of this note.

1.8.4 Tables

Tables are numbered consecutively (with Arabic numerals) throughout the case study (including text and appendices). There are two possible numbering schemes: either (a) number them consecutively throughout the text, or (b) number them by part, e.g. Tables 1.1, 1.2 and 1.3 for Tables in Part I, and Tables 2.1, 2.2, and so on for Tables in Part II. No case study may have two different tables called “Table 1.” All tables are to be listed under LIST OF TABLES in the preliminary pages (including tables appearing in the appendix). Tables should be placed after their mention in the text. Short tables should not stand alone on a page.

Tables are captioned single-spaced above the tables. Capitalize only the first letter of the principal words in captions (excluding words like “the”, “to”, etc.) If preferred, use “down style” in which all letters are lowercase except the first letter in the caption and proper nouns.

Table sources and notes should be placed directly below the table (not at the bottom of the page). Use superscript symbols (e.g. *, **, ***, etc.) or lowercase letters, but never numerals for table footnotes. Reference indicators to these notes should be used only on column heads or in the main body of the table but never on the table number or caption. If the symbol or number cannot be inserted on the stub head (the left-hand column), any note needed for the table number or title should be so indicated, e.g., Note: . . . and should follow Source (if any) at the foot of table.

1.8.5 Figures

Figures include maps, charts, graphs, diagrams, photographs – in short, any kind of illustration. Each of these is numbered consecutively or according to the part in which it is included throughout the case study (similar to the Table referencing). Figures should be professionally done and of high quality. The trend now is to use computer layout.

The figure number and caption should be typed above or below the figure using Arabic numeral and lowercase, except for proper nouns and first letters of principal words. As with tables, if preferred, you can also use “down-style” in which all letters are of lowercase except first letter in caption and proper nouns. Figures should be inserted near their mention in the text.

If a figure occupies an entire page, the caption typed on the left-hand broadside page should have the top of the figure at the binding edge. The figure number should be typed parallel to the way the figure reads. The page number is typed in standard text position. Figures should conform to standard margin requirements.

1.8.6 Footnotes

Footnotes should be used sparingly. They should be used only to clarify a certain terminology, to state conversion factors or exchange rates and not to cite authority for specific statements or research findings of others. A citation of authority is done in the text as described in the following section. Extensive footnoting tends to distract the reader from the main argument of the text. If footnotes are necessary, the indicators (the number in the text) are usually superscript. The numbering must be continuous within each chapter or appendix, not throughout the text. That is, start each chapter or appendix with the superscript¹ which will be repeated, as here, at the bottom of the page.

1.8.7 Citations in the Text

The author is responsible for choosing an appropriate and consistent style of citation. The standard format for work in management is that called APA (American Psychological Association). The system is available online and also in reference books available in the GSM reference room. In addition, you should consult your supervisor for guidelines.

1.8.8 References

The reference list is the list of works cited. Every piece of work cited in the text must be properly referenced in the reference list.

GSM requests that you use APA unless you are writing a law-related case when the referencing will be entirely different. A sample of APA is given in Appendix C.

1.8.9 Appendices or Annexes

An appendix or annex, if any, is placed after the reference list. Details of the appendices are listed by type in the Table of Contents. Appendices include original data, summary, side-line or preliminary tests, tabulations, tables that contain data of lesser importance, very lengthy quotations, supporting decisions, forms and documents, computer printouts and other pertinent documents. Appendix materials should be grouped by type, e.g. Appendix A: Questionnaire, Appendix B: Original Data, Appendix C: Result Tables, etc.

2.0 Writing Conventions

2.1 Units of Measure

Use internationally recognized units of measure, preferably SI, such as:

- 1 litre (1L)
- 20 millilitres (20mL)
- 5 kilograms (5kg)
- 20 kilometer (20km)
- 2.5 hectare (2.5ha)
- 3.7 metric tonnes (3.7t)
- 45 parts per million (45ppm)
- 12 grams (12g)
- 500 U.S. Dollars (USD500)
- 3.4 metric tonne/hectare (3.4t/ha)

The numbers before the measurement units should not be spelt out, e.g. 5kg, not five kg even if they are below 10, unless they are the first word of sentences.

2.2 Numbers

All integers less than ten should be spelt out unless attached to units of measure (e.g. 5kg, 10mL). Use figures for number 10 or more than 10. If a sentence begins with a number, write the number in words, e.g. "Three hundred and eighty-five farmers were sampled from the study area".

2.3 Elliptical Mark

Writers use the ellipsis mark to show an omission from quoted material. The ellipsis consists of three-spaced full stops (...). When an ellipsis follows a sentence, it appears as four full stops (....). One full stop marks the end of the sentence and the other three signal the omission.

2.4 Use of Brackets ()

Within direct quotations, square brackets are used to enclose any explanatory note inserted by the writer e.g.

This year [1996] alone, we had two hundred applicants wanting to join our holiday camp (Mustapha, 1996).

Candidates should use "sic" within round brackets (sic) to indicate a certain doubt as to meaning or factual error. It is used in quotations to show that the original is being faithfully reproduced even though it is incorrect or seems to be so. However errors which are obviously typographical, such as spelling or punctuation errors, should simply be corrected as a matter of professional courtesy.

2.5 Use of Symbol for Percentage

The symbol % may be used in place of the word percent, e.g. 27.3% and typed without a space. If the candidate prefers to write 27.3 percent in full, then consistency should be maintained throughout. In tables, the abbreviation Pct may be used at the head of the table column to mean percent.

2.6 Policy on Direct Quotations

Direct quotations must be minimized in a case study.

3.0 Technical Specification

Typing should be done on a word processor, with printing done on a letter quality or a laser printer.

3.1 Typeface and Font Size

The entire text of the case study, including headings and page numbers, must be produced with the same font or typeface. The font size should be 12-point and should not be scripted or italicized except for scientific names and terms in a different language. Bold print may be used for headings. Footnotes and text in tables should not be less than 8 point.

Some fonts appropriate for case study copy are:

- a. Arial
- b. Book Antigua
- c. Bookman
- d. Helvetica
- e. Times New Roman
- f. Palatino

3.2 Margins

The left margin should be at least 40mm and the right, top and bottom margins are at least 25mm. Margin specifications are meant to facilitate binding and trimming. All information (text heading, footnotes, and figures), including page numbers, must be within the text area.

3.3 Spacing

The case study should be typed double-spaced with four spaces between paragraphs and sections. The following, however, should be single-spaced:

- a. Explanatory footnotes (if absolutely necessary);
- b. Quotations longer than three lines set in a block;
- c. References or bibliography (except between entries);
- d. Multi-line captions (tables, figures);
- e. Appendices, such as questionnaires, letters; and
- f. Headings or subheadings

3.4 Pagination

All pages should be numbered centrally or right flushed either at the top or bottom margin. Page numbers should appear by themselves and should not be placed in brackets, hyphenated or accompanied by other decorative devices. Print text or figures on only one side of each sheet. Only the original word-processed copy of case study or its good and clean photocopies will be accepted.

3.5 Paper

White simili paper (80gm) or paper of equivalent quality should be used. Paper should be of A4 size (210mm x 297mm).

3.6 Binding

The case study should be bound with maroon hard cover. The binding should be of a fixed kind in which pages are permanently secured. The following should be lettered in gold from the head to the foot of the case study, using 18-point fonts:

- a. Name of candidate;
- b. Degree for which the work is submitted; and
- c. Year of submission

The following particulars should be provided on the case study cover, using 18-point gold block font:

- a. Title of case study
- b. Name of candidate
- c. Degree
- d. Name of university; and
- e. Year of submission

3.7 Page Layout

The text should be written in portrait layout. Landscape layout may be used for Figures and Tables.

Important

- a. *Your case study must be in your area of specialization.*
- b. *Each student has to choose one supervisor from any academic background from GSM or those affiliated with GSM.*
- c. *Three hardbound copies of your case study must be submitted by the 15th week of the trimester.*

APPENDIX A

Spine and Cover of the Case Study

CANDIDATE'S NAME	TITLE OF THE CASE STUDY
MBA	CANDIDATE'S FULL NAME
YEAR OF SUBMISSION	MASTER OF BUSINESS ADMINISTRATION UNIVERSITI PUTRA MALAYSIA YEAR OF SUBMISSION

← SPINE →

← COVER →

APPENDIX B

TITLE PAGE

**DIGITAL STORAGE MALAYSIA:
MANAGING EMPLOYEE RETENTION**

By

AHMAD BIN YUSOFF

**Case Study Submitted in Partial Fulfilment of the Requirements for the
Degree of Master of Business Administration at the Graduate School of
Management, Universiti Putra Malaysia**

May 2005

APPENDIX C

EXECUTIVE SUMMARY

Digital Storage (M) Sdn. Bhd. (DSM), a US-based harddisk drive (HDD) manufacturer located in Petaling Jaya, was facing difficulty in retaining talented workers within the organization. Quality of new product was badly jeopardized due to inexperienced engineers being assigned to implement correction actions on identified root cause of failure. Top management of DSM was very concerned whether the company would be able to meet the schedule of new product launching.

Increasing pressure in market competition had made DSM struggle to secure profits. This had forced DSM to undergo a series of aggressive activities in response to stiff HDD market conditions, which most of it involved cost cutting in operating expenses. An employee survey was conducted in 2004. Survey results revealed a significant decreased in employee's satisfaction towards the company when compared to results of similar survey conducted in 2002.

From the study, the root causes of employee retention problem encountered by DSM could be summarized into following:

- a) Lack of career development and opportunity for advancement
- b) Lack of job security

- c) Uncompetitive rewards system
- d) Lack of recognition and appreciation of works
- e) Dysfunctional performance management system

Performance-based compensation program is suggested as a short-term solution for DSM. Performance-based compensation program is targeted to solve retention problem that is due to uncompetitive rewards system, lack of recognition and appreciation of works, as well as dysfunctional performance management system. As a long-term solution, the company is highly recommended to develop second strategy for the career development of its employees. Career development strategy is recommended to solve retention problem due to lack of career development and opportunity for advancement, as well as lack in job security.

Employee retention is an ongoing process. Three key components: the employees, organization and management must be committed to the success of this process to ensure mutual benefits for all parties.

APPENDIX D

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APPENDIX D1

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APPENDIX E

Examples of Reference Format

Journal:

Ho, Y.W. and Nawawi, A. (1991). Effect of carbon and nitrogen sources on growth of *Ganoderma boninense* from oil palm. *Journal of Plant Protection in the Tropics* 8:37-43.

Monographs:

EITHER

Turner, H.N. and Young, S.S.Y. 1969. *Quantitative genetics in sheep breeding*. Ithica: Cornell University Press.

OR

Herlina, S. and Tan, F.H. 1992. Molecular aspects of typhoid fever. Kuala Lumpur: Protea Press.

Book Chapter:

Chan, T.K. 1992. Plasmids of enterobacteria. In *Pathogenesis of bacterial infections*, ed. A. Ramirez, and S. Aquino, pp. 235-243. Kuala Lumpur: Protea Press.

Roberts, D.W. 1980. Toxins of entomopathogenic fungi. In *Microbial control of pests and plant diseases*, ed. H.D. Burgess, pp. 441-463. New York: Academic Press.

Personal Communications:

These should be mentioned in the text in the following form: (A.B. Salleh, 30 May 2005, pers. comm.).

Webpages

Vice President, 2002. University of Calgary Research Policies and Procedures Handbook. http://www.ovpr.uga.edu/rpph/rph_misn.html. Accessed on 23 February 2005.

Author, Y. Title of the article or information. <http://www.webpage.com>. Accessed 17 March 2006.

Thesis

Author, Y., 2002. Title of thesis, Ph.D Thesis, Name of University, Country.

Reports

Type 1

Country/Date/Ministry/State/Institution/. Title of reports.

Malaysia, 2006. Rancangan Malaysia Kelapan 2001-2005.

Type 2

Committee Name/Date/. Title of report/ Place/ Publisher

APPENDIX E1

Samples of APA Referencing Format

American Psychological Association (APA) (from the 5th edition of the *Publication Manual of the American Psychological Association*, (APA) 2001; used in management, the social sciences and education.) For detailed, specific information, check in the *APA Publication Manual* or visit the *APA Publication Manual* Web site: www.apastyle.org (no full stop after “org”).

Notice that APA style has changed several times; be sure to use the latest style. Especially watch your use of capital letters. You will need them for the first word in a sentence or title, for all proper nouns (e.g. names of people or publishing firms), for first person singular (I) when subject of a clause, and for all key words in a journal title. No other words, whether in titles of books or articles or anything else, have them. Look closely at the following examples to ensure you grasp the pattern.

Book

Moore, W.K. (2004). *Malaysia: A pictorial history 1400-2004* Kuala Lumpur: Archipelago Press.

Article in a book

Pratt, D. (1998). The role of religion. In M. C.McLaren. *Interpreting cultural differences* (pp.86-96). Norfolk: Peter Francis Publishers.

Journal article

Muir, C. (2002) Upgrading business literacy and information skills. *Business Communication Quarterly*. 63(3), 127-129.

Conference paper given but not published in proceedings

Wilkins F.G. *Structure of compounds*. Paper presented at the meeting of the Canadian Chemical Association, Ontario. June 2005.

Conference paper published in proceedings

Naharajah, S. Common carcogens, In *Structures of carcogens*, Proceedings of the international congress on carcinogenic compounds, Perth, Australia, Sept.3-5, 2005. Johnson B. Ed.; McGraw-Hill: Sydney, 2005.

Newspaper and non-scientific magazines article

Smith, J. B. Pollution problems. *Time*, August 22, 2005, pp.3-4.

Report with no named author

Air quality aspects of the development of offshore oil and gas resources; California Air Resources Board: Sacramento, CA, 1994.

Ph.D. dissertation

Wong, T.L.(2005). *Changes in Chinese negotiation skills*. Unpublished doctoral dissertation, University of Nottingham, Malaysia.

Internet citation

Stolberg, S.G, 1997. Bid to absolve saccharin is rebuffed by US panel, <http://www.junkscience.com/news/sac2.html> Brown, T. A.. (2004) (2nd ed.). Blackwell.