

MANAGING INFORMATION

Use this sheet to help you:

- Manage information resources effectively.

5 minute self test

Before you read the Helpsheets, spend five minutes considering the following questions:

- Why is it important to manage information collected in a systematic and careful manner?
- What technology-based and manual systems are available for managing information?
- What is the difference between a volume of a journal and an issue of a journal?
- What are indexes and abstracts and why are they useful?

1. Introduction

Over the duration of your postgraduate studies, you will amass hundreds of resources including books, journal articles and articles from websites. Unfortunately, it is all too easy for this collection to become out of control very quickly—to the extent it can become almost impossible to find what you need.

Therefore, in order to stay on top of your studies, you will need to develop an effective way to manage information once you collect it, that is, you will need to develop an effective file management system.

Good file management saves time in the long run. You will often find that the material that you use for a particular literature review or research essay will be useful for other assignments later on in your university course. The same articles can be used for different subjects in different ways as well as in different discipline areas altogether. And, of course, it is even possible you will need these texts for work purposes after you graduate.

This chapter outlines some suggestions to help you to quickly devise a workable file management system.

2. Managing Information

Most students quickly find themselves unable to manage databases comprising hundreds of personally collected resources. What do you do with all these resources? Keeping them on a “favourite” list on the computer is one way, but this makes it hard to search for something specific if you need to find it again. One has to trawl through lists of potentially thousands of resources, and this is inefficient and takes time.

A simple thing to do is to categorize the resources somehow. But how do you do it?

A good postgraduate student will quickly see the need for their own personal cataloguing system. Sometimes this is very informal (cards or pieces of paper in a shoebox). Sometimes it is more sophisticated (a filing cabinet of papers with a card catalogue). Sometimes it is very sophisticated (an electronic management system). Whichever way is chosen, a sorting procedure has to exist. Here are some tips for doing creating one:

- Create a list of subject headings. Such a list will vary in length and rigidity, depending on the research purpose. How many headings and sub-headings do you need? This will depend on your area of study.
- Avoid having a variety of terms for a single concept, which would make retrieving material later very frustrating. Decide early on what concepts you need. Stick to your list and don't change the terms for the concepts.

- Read each paper or article as soon as it is collected. Don't make the mistake of photocopying or downloading articles, printing them, and leaving them on your desk. You will find that you forget what you have printed, and may print it twice! Reading things as you find them ensures that there is a memory trace of the article.
- File the paper away immediately after it has been read. Add the paper to the cataloguing system immediately. Make this a daily routine.
- Enter citations into the file management system in a conventional referencing style used by your faculty and university. (See **CELT Helpsheets: APA System and Harvard System**).
- Make sure you ensure a minimum of author and subject access are available to you. Title access is also useful. When you are searching for the same resource again (possibly years after you first read it) you need to be able to find it a number of ways, by name, title or subject area.
- Begin to organise your files by authors. Often using the title of papers is preferred over author access. However, in a card file this becomes very clumsy once fifty references or more have been reached. As a postgraduate your sources over the course of a two or three year degree will (and should) vastly exceed fifty references. As research progresses, it is natural to use the author's name more. Electronic files, of course, automatically provide a variety of possible access points.
- Note the author details in your card system or electronic system immediately you obtain a source, e.g.

Davies, Martin

(being sure to record surname and given name correctly)

Add the citation details. If you are using a card system, this can go on the back of the author card. Then have another card for the citation details under a different category, e.g. title:

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(being sure to format the title in the required style)

Again, record the citation details here as well, or use a coding system to find the citation details on the author card, e.g., AC: 136 (author card number 136).

Then create another card for the details under another category, e.g., subject. Make sure that the reference is filed under the correct sub-category of the subject list.

- Documents such as journal reprints and conference papers need to be arranged systematically and linked to the file management system. It is critical that documents can be located quickly and easily. A filing cabinet is ideal for this purpose. Don't make the mistake of merely putting papers on your desk. Within a few weeks you will not be able to find anything!
- As noted, documents may be usefully arranged by author, broad subject categories, number, or year. If broad subject categories are used, there needs to be further arrangement within each category, such as by author or numbering of each document. Arrangement by year can be effective if an historical treatment of the literature is required.

A Personal Story: A Disorganised PhD Student

As a former graduate myself, I know very well the pitfalls of poor information management. Unfortunately, it is from bitter experience that I am giving this advice. It took me several years of inefficiency to realise what I needed to do. I'd better confess that I did not follow my own advice!

Within a year of my doctoral studies, I had literally hundreds of articles and book chapters, all diligently photocopied and lying around my room. By the end of the second year, I had around one thousand. Some of these had been read, some I had intended to read, some I had scanned quickly and had half understood.

It became clear that I had only collected information, but I had not managed what I had collected. Therefore, I could not find things that I needed. While writing an important chapter of my thesis, I frequently wasted time thereby stopping the creative flow trying to find specific references that I had but could not remember and ideas from sources that I recalled reading months ago.

Poor information management is as foolish as having all the ingredients for cooking a dinner party scattered around the kitchen haphazardly. Imagine trying to cook a meal and having no ideas about where to find the sauces, the vegetables, or the spices!

Information management is a truly a life skill and one that may even help you get a job and advance quickly in your career. Learning this skill begins with graduate study.

Here are some further suggestions for information management:

- Keep track of what you need to read, or need to get on inter-library loan (borrowing from another library). Sometimes it takes weeks to get a source from a library interstate or overseas. Plan ahead. Note when you request the item, when it arrives, when you read it and when you file it away.
- Maintain a diary of what you request, when you request it and from where the resource is coming. If you don't do this you may forget your requests and request texts twice!
- Ensure you have absolutely correct bibliographic information for everything you read:
 - author(s)/editor(s)
 - title of article/book
 - place of publication, publisher
 - date of publication
 - volume and issue number
 - inclusive page numbers
- Begin compiling your assignment bibliography as soon as you start reading. Add everything you read. Delete as necessary later.

Volumes and Issues

In my experience, many international students are not clear on the difference between volumes and issues in journals. Journals publish collected papers or articles in "issues". A "volume" is comprised of a number of issues bound together. Journals publish articles first in bound issues. When there are a suitable number of issues, they are bound together as volumes. When you look for a certain article in a journal, you not only need the title of the article and the name of the journal, but the volume number and issue number in which the article appears. This is usually expressed as follows: 'title of article', *Journal name*, Volume 2 (5).

The number of volumes and issues varies from journal to journal. Some journals have an issue each month; volumes could be published each quarter (some US journals have volumes called: "Fall", "Summer" etc). Alternatively, the issues might be published each quarter, and the volumes are published each half year, and so on. You need to check each journal to be sure.

Different numbering systems are used for volumes and issues. Sometimes issues are identified with an Arabic number (1, 2, 3 ... etc) and volumes with a Roman number (I, II, III, IV, etc). As noted above, some volumes are identified with words such as "Spring", "Fall" or "Summer".

It's a good idea to visit your library journal section and familiarise yourself with the "Volume/ Issue" conventions.

3. Computer Based File Management

As noted, during the course of a postgraduate degree the volume of information which needs to be managed can be very large. Typically, the resources can amount to hundreds, or even thousands of articles (in the case of doctoral study). Using bibliographic file management software, such as EndNote, Procite, Filemaker Pro, Ref Works, Notebook or Reference Manager can simplify this process greatly.

Some universities offer the free availability of electronic systems under a site license arrangement. Often students do not find this out, and they spend years managing information using a card system when they could have had the free use of an electronic system. However, be aware that computer-based systems take time to learn and often it is better spending one's time doing other important things.

4. Indexes and Abstracts

Journal indexes and abstracts come out regularly (as do journals), with each issue listing the most recent articles on a particular subject.

Journal INDEXES give the bibliographical details (author, title of article, name of the journal, volume, year of publication and page numbers) for articles. This is the information you need to find the journal in the computer catalogue and then on the shelves.

Journal ABSTRACTS also give the bibliographical details but add a short summary of the article to help you decide if you want to read it.

What follows is an example of an abstract from the database EconLit. Study it and think about its format.

TI:	Title Privatisation Initial Public Offerings in Malaysia: Initial Premium and Long-Term Performance
AU:	Author Paudyal, K; Saadouni, B; Briston, R J
AF:	Affiliation Glasgow Caledonian U; Centre for International Capital Markets Research, U Hull; Centre for International Capital Markets Research, U Hull
AV:	Availability http://www.elsevier.com/inca/publications/store/5/2/3/6/1/9/index.htm Publisher's URL
SO:	Source Pacific-Basin Finance Journal, vol. 6, no. 5, November 1998, pp. 427-51
IS:	ISSN 0927-538X
AB:	Abstract This study addresses four major issues related to privatisation initial public offers (PIPOs) and other initial public offers (IPOs) in Malaysia. First, an analysis of initial excess returns suggests that, on average, Malaysian IPOs are underpriced and PIPOs offer significantly higher initial returns than other IPOs. Second, regression based analysis reveals that over-subscription, market volatility, proportion of shares sold, underwriters' reputation, and ex ante risk together explain over three-quarters of the variation in the excess returns offered by Malaysian PIPOs. However, this model can only explain 10% and 36% of other IPOs and the whole sample respectively. Third, the analysis of secondary market performance suggests that neither PIPOs nor other IPOs significantly outperform/underperform the market over three years. Further analysis reveals that the IPOs with higher initial return underperform the market while those with low initial return outperform. Finally, the paper confirms that IPOs underwritten by reputed underwriters are significantly better long-term investments as compared to the IPOs underwritten by less reputed underwriters.
PY:	Publication Year 1998
PT:	PublicationType Journal Article
DE:	Descriptors Asset Pricing (G120); Economic Development: Financial Markets, Saving and Capital Investment (Financial Intermediation) (O160); Boundaries of Public and Private Enterprise, Privatization, Contracting Out (L330); Capital Markets--Empirical Studies, Including Regulation (3132); Capital Markets: Theory, Including Portfolio Selection, and Empirical Studies Illustrating Theory (3131); Business Investment (5220); Economic Development Models and Theories (1120); Public Enterprises (6140); Malaysia; IPO; Privatization
UD:	Update 199903
AN:	Accession Number 0485054

Glossary of Terms

File management or Information management	A system which allows you to store and retrieve scholarly information quickly and efficiently
Card system of file management	A simple and cheap method of file storage on cards under subject and author headings
Inter-library loan	A facility where items from other libraries can be retrieved for your use (usually for a small fee)
Bibliographic citations	Reference information in a bibliography or reference list
Volume (of a journal)	A bound collection of journal issues
Issue (of a journal)	A bound collection of papers in a journal that appears regularly
Computer-based file management	Using a computer to do file management
Journal indexes	Books that list the publication details of journal articles
Journal abstracts	Books that list the abstracts or summaries of the contents of journal articles as well as the publication details
Subject librarians	Specialist librarians that can help you find information in your subject area
Information desk librarians	Librarians which offer initial advice on library services and general information
Search strategy	A systematic process of finding academic resources