RIGA TECHNICAL UNIVERSITY

Faculty of Engineering Economics and Management
Faculty of E-Learning Technologies and Humanities
Foreign Students Department

FORMATTING AND STYLE GUIDELINES FOR STUDY AND GRADUATE PAPERS

RTU Press

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FORMATTING AND STYLE GUIDELINES FOR STUDY AND GRADUATE PAPERS

Formatting and Style Guidelines for Study and Graduate Papers have been developed as the guidelines for formatting all kinds of study papers (including reports, research papers, study projects, internship reports, etc.) and graduate papers (qualification papers, diploma papers, bachelor and master theses). The book is intended for international students, academic staff, scientific advisers and reviewers of graduate papers and the final examination commission members of RTU FEEM and FELT.

Guidelines have been developed by the FEEM, FELT and FSD team headed by Professor I. Lapiņa and Professor M. Platonova. Corporate authors: L. Budņiks, K. Fedotova, K. Kozlovskis, T. Smirnova, D. Ščeulovs and I. Tipāns.

Guidelines have been developed on the bases of "Formatting and Style Guidelines for Study and Graduate Papers in FEEM" in Latvian.
Approved at the meeting of:
   – FEEM Methodological Commission on 8 May 2017, Minutes No. 22000-6/1.
   – FELT Council on 21 June 2017, Minutes No. 31.

Table of Contents

1. Methodological Guidelines

The curricula of various study programs and the syllabi of individual study courses envision that alongside other academic activities and performance tests students develop and present various study papers – reports, projects and other individual or group papers. If internship forms a part of the program curriculum, students have to draw internship reports and publicly present them upon completion. The abovementioned papers are included in the study program curricula to ensure students acquire competences and skills in theoretical knowledge systematization, information analysis and practical application required to develop a graduate paper and take the *viva* (*viva voce*) – publicly defend the results of their research.

1.1. Paper Design

The guidelines concerning thematic scope and content of a paper are determined by the head of each study program and the responsible member of academic staff. Paper development process includes several stages:
- selection of the theme/research problem;
- paper structure design and development process planning;
- summarizing information and data;
- data analysis and systematization within the relevant theoretical framework;
- drawing and formatting the paper.

Survey and gathering of information is an important stage of paper design. As the required data are being summarized, partial data processing and systematization takes place, the data are also checked for relevance and sufficiency. A student has to comprehensively and thoroughly research theoretical and practical aspects of the problem to be solved, to evaluate critically the available bibliographic sources and empirical data.

Study and graduate papers have several compulsory constituent parts:
- title page (See Appendixes 1–3);
- abstracts (in Latvian and English; only for graduate papers);
- table of contents (See Appendix 4);
- introduction;
- framework of the research (the body), which is divided into parts, sections and subsections in accordance with the requirements concerning paper content;
- conclusions and proposals;
- list of references (See Appendix 5);
- appendixes (if required);
- acknowledgement (if necessary);
- declaration of academic integrity of the graduate paper author (only for graduate papers);
- work performance and assessment sheet (only for graduate papers).

In accordance with paper structure and design, the student develops the body of the paper drawing relevant conclusions at the end of each part and/or section. Conclusions and proposals made at the end of the paper should be substantiated, proven and reasoned.

Finally, the student shall format the paper in conformity with the Formatting and Style Guidelines for Study and Graduate Papers and shall submit it for evaluation in accordance with the set procedure.

1.2. Parts of the Paper

The structure of the paper comprises the following parts: introduction, the body, conclusions and proposals.

Introduction

Introduction is an important part of the paper, which includes but is not limited to the following:

- substantiation of the topicality of the theme;
- hypothesis or research questions (if necessary);
- aims/goals of the paper;
- formulation of the tasks/objectives necessary to achieve the aim of the paper;
- substantiation of the limitations to paper aims and tasks;
- list of research and planning methods and techniques employed;
- research period;
- list of references and literature sources;
- other information specified by the responsible member of academic staff in accordance with the study paper requirements.

The author of the paper sets a list of *research questions* or formulates the *hypothesis* in the form of a statement that has to be either proved or rejected. Based on the topicality of the selected theme, the author sets and formulates the *aim of the paper*. The formulation shall be brief and specific; it is recommended to specify measurable expected results. In accordance with the aim of the paper, the author sets the *tasks* that should be performed to achieve the aim. The set tasks determine the framework of the paper, as each tasks is addressed in the respective section the paper.

Limitations of the theme should be considered when it is not possible to comprehensively research all issues pertaining to the problem within the scope of the given paper.

Research *methods* are tools used to complete the research tasks. The more accurately the research methods are selected, the more successfully the aim of the paper is going to be achieved. The range of available research methods is wide, therefore, the student should clearly specify in the introduction which methods will be used in the present research. The research methods used in the paper may include:

- general research methods (analysis and synthesis, abstraction, inductive and deductive method, monographic or descriptive method, etc.);

- mathematical and statistical methods (estimation, comparison, correlation, grouping, etc. of mean and relative values, indexes, etc.);
- linguistic research methods (contrastive, corpus, text and discourse analysis, semantic and pragmatic methods, terminology research, intersemiotic research, etc.);
- empirical research methods (survey, observation, interview, case study, expert method, etc.);
- research methods topical for the specific industry or professional field.

The obtained information is reflected in tables and figures, the included information shall be clarified and commented upon and evaluation of regularities shall be provided in all cases.

Sources of the research may include:

- fundamental scientific research and monographs;
- articles from scientific journals and conference proceedings;
- publications on results of basic and applied research;
- general and special literature, periodicals;
- text corpora, data bases (dictionaries, glossaries, encyclopaedias);
- laws, regulations of the Cabinet of Ministers, EC regulations and other regulatory documents, standards;
- statistical data;
- unpublished materials of companies, institutions and other organizations;
- different internet resources.

The authors can also refer to the results of polling, interviews, etc. and special surveys, as well as experiments performed ***under supervision or with participation of the author***.

The Body of the Paper

The body of the presented research material is divided into **parts**. It is expedient to divide volume-wise large parts into sections, which can be further subdivided into subsections. The number of parts, sections and subsections depends on the paper volume and content. When the paper is organized into sections and subsections, their volume **may not** be less than two pages.

A part **may not** have just one section and a section may not have just one subsection.

The task of the **body of the paper** is to provide description of the investigated problem, data analysis, results, conclusions and proposals of the author's research in a systematized way. All parts should include illustrative materials and/or calculations: analytical tables, figures, formulas, etc.

Conclusions and Proposals

The final part of the paper comprises **conclusions and proposals** (if applicable). They are formulated as theses and are numbered separately – first conclusions and then proposals. Exceptions are possible, if determined otherwise by the responsible member of academic staff.

Conclusions reflect the most important ideas, which are based on the results of the research performed in the paper and provide solutions to the aims and tasks formulated in

the introduction. Conclusions explain theoretical and practical significance of the performed research and the author's personal achievement in solving the tasks. Conclusions proceed from the paper and **may not** be substantiated with the data and facts, which are not mentioned in the paper. Conclusions may not contain quotes from the works of other authors, but only personal views, ideas and opinions of the student.

Proposals proceed from the research conducted in the paper and are based on the conclusions made; they should be specific, substantiated and, whenever possible, addressed. Proposals summarize recommendations, offer improvements to be introduced or positive experience to be used, if such is mentioned and substantiated in the paper.

2. Formatting the Paper

2.1. Page and Text Layout

The paper is computer-typeset on the standard size pages (A4 format – 210 mm × 297 mm). The paper is printed on both sides of vertically oriented pages (Portrait), except for the title page, abstracts and table of contents.

Pages should have **margins** of the following **size**:

⇨ right – 2 cm;
⇦ left – 3 cm;
⇧ top – 3 cm;
⇩ bottom – 2 cm.

Pages are numbered with Arabic numerals in the top right corner, 1–1.2 cm away from the first row of the text. If the work is printed on both sides of the paper, page number on the right page of the opening shall be placed in the upper right corner of the page, whereas page number on the left page shall be in the upper left corner. In other words, page number shall always be in the outer upper corner of the page. The first page is the title page, the second is Table of Contents – these pages are not numbered. In case of the graduate paper, Abstract is placed on page 2, and Table of Contents – on page 3, these pages are not numbered. Pages are numbered starting from the first page of the introduction. All pages including unnumbered ones are counted in the total number of pages.

When printing the paper on both sides of the page, *mirror margins* should be set: in the **Layout** tab **Page Setup** group, choose **Mirror margins** from the **Multiple pages** list. Page margin settings are provided in Figure 2.1.
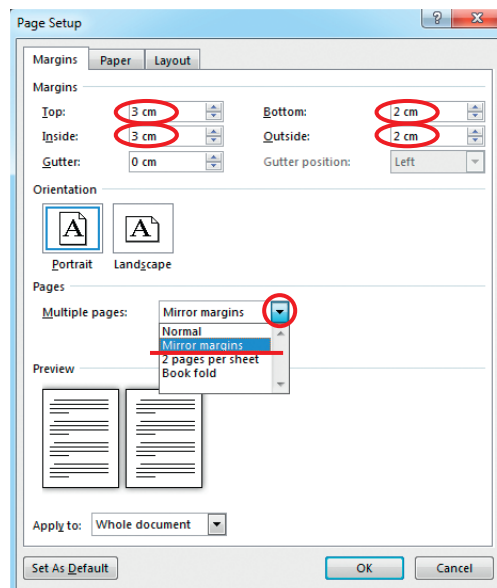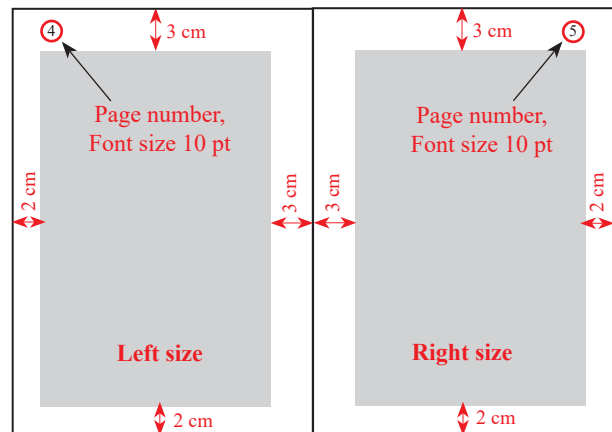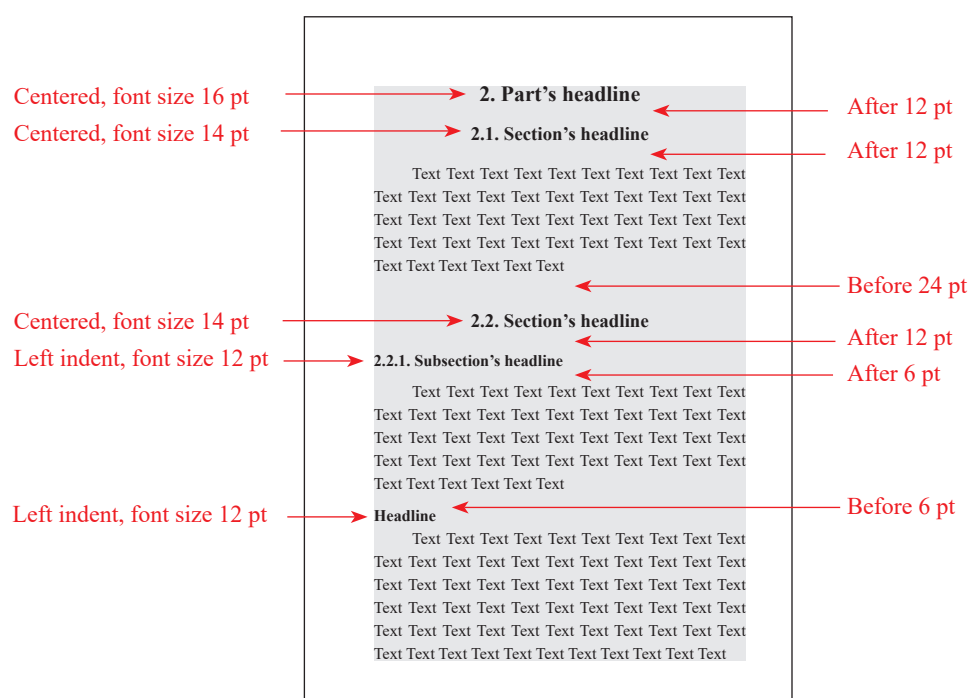

Figure 2.1 Page margin settings when printing the paper on both sides of the page.

Font size of the paper text is **12**; the font is **Times New Roman** or **Calibri**. **Line spacing** is **1.5**; colour of the letters is **black**.

The paper text should be evenly leveled out (***Justified***), as it is in the given document.

Headlines should be formatted observing the following requirements:

- Headlines of parts, sections and subsections are written using small letters and capitalizing the first letter of each meaningful word. Words in headlines *are neither hyphenated, nor underlined*; *full stops* are not put after headlines.
- Headlines of chapters (introduction, conclusions and proposals), parts, sections and subsections are written in **Bold**.
- It is recommended to avoid long headlines – maximum two rows. If a headline is longer than one row, **Line Spacing** between the headline rows is **1** (***Single***).
- If there are two headlines that follow one another (for example, sections and subsections), the **Spacing** between them is 12 pt.

Centered, font size 16 pt	**2. Part's headline** — After 12 pt
Centered, font size 14 pt	**2.1. Section's headline** — After 12 pt
	Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text — Before 24 pt
Centered, font size 14 pt	**2.2. Section's headline** — After 12 pt
Left indent, font size 12 pt	**2.2.1. Subsection's headline** — After 6 pt
	Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text
Left indent, font size 12 pt	**Headline** — Before 6 pt
	Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text Text

Within the framework of a part, a text starts with a **spacing** of 12 pt from the headline. In sections and subsections, the **spacing** between the headline and the previous text is 24 pt.

The following stretch of text starts with a **spacing** of 12 pt from the headline.

The paper should be written using grammatically and stylistically correct language observing the conventions of the **academic writing style**:

- Exposition should be precise, clear, logical, reasoned and specific;
- A new idea is introduced in a new paragraph starting with indent;
- A new part is started on a new page, sections and subsections are continued after the previous text;
- Each part is provided with an ordinal number (in Arabic numerals) and a title;
- A section number is related to the part number, and a subsection number to that of the section;

- The titles of parts, sections and subsections in the text should precisely match the corresponding names listed in the Table of Contents;
- The titles of the parts – introduction, conclusions and proposals, list of the used literature and resources should be preceded with numbers;
- When using quotations, numerical data, figures, tables, formulas, etc. (referring to these) **references should be** provided **in all cases**.

Parts, sections and subsections **may neither start nor finish** with tables, figures, formulas or a list of sub-clauses. Parts, sections and subsections should start with an introductory text written by the author, and only then, if required, illustrative material, as well as an explanatory text and analysis performed by the paper author may be presented. The same refers to the final paragraphs of the parts, sections and subsections.

2.2. Tables

To make the content of the paper clear and illustrative, it is recommended to present the used numerical information in the tables. However, the paper should not be overloaded with numerical information, as redundant numbers impede understanding of the paper. Numerical material presented in the tables or depicted graphically should be explained and analysed in the paper, and the text should contain a reference to the table. Sometimes tables are also used to provide a clear structure to the text.

Each **table** should be ascribed an ordinal number within the framework of the respective part. Tables are numbered with Arabic numerals and the number is written above the table aligned to the right. The word "Table" is capitalized. In the designation "Table 2.1", the first figure means the number of the part and the second – the ordinal number of the table in the respective part, in this example – in the second part of the paper.

A title (headline) is formulated for each table with the reference to its content. The title is provided above the table and below its number. The title of the table is written in lowercase letters and a capitalized first letter, **with no full stop** at the end.

If the table is taken from external reference sources, **a reference should be provided** in brackets after the headline.

Example

Align right
No line spacing

Table 2.1

Centered

No line spacing

Erasmus + Mobility 2015/2016 (RTU Facts & Figures, 2017, 5)

	Partner universities	Students		Staff	
		Incoming	Outgoing	Incoming	Outgoing
1	2	3	4	5	6

Empty row

The table content is divided into columns and rows, which are named. Titles of tables, columns and rows should be precise and, to the degree possible, provide answers to questions: What? Where? When? When required, units of measurement are provided. Titles of columns and rows in the table are capitalized; sub-titles are written in lowercase letters, when they form a sentence with the column title, or are capitalized when they are provided on their own.

If a table is continued on another page, or for more convenient analysis of the data, columns are numbered. If a table is placed on one page, column numeration is not required.

When a table is continued on another page, first "Table 2.1 Continued" is written, providing its number, then the numbering of the table columns is repeated.

Example

			Align right ⟶	Table 2.1 Continued	
1	2	3	4	5	6

↕ Empty row

When referring to a table, its number should be provided in the text or an abbreviation "Tab." with the table number should be provided in brackets.

Example

The figures of the Erasmus+ Mobility in 2015–2016 are presented in Table 2.1.
or
In the last five years, an increase in the number of participants in Erasmus+ Mobility program has been observed at RTU (See Tab. 2.1).

Whenever possible, tables in the paper are placed immediately after the first reference to them in the text. Moreover, tables should be placed so that it is convenient to view them. Large tables, which occupy more than 2/3 of a page, should be placed in Appendices, and the reference to them and analysis should be presented in the body of the text. In exceptional cases, having received approval of the scientific advisor, larger tables can be used. Tables are centered on the page.

It is recommended to avoid using big numbers in tables. It is expedient to use increased units of measurement (for instance, to use 1,000 thousand pcs or 1 m pcs instead of 1,000,000 pcs). Not more than two digits should be left after the point, unless specifically required.

Standardized units of measurement and their designations should be used in the paper. When all data in the table are expressed in one unit of measurement, it can be shown in brackets in the headline of the table. When the table data are provided in different units of measurement, they are shown in a separate column or in the column names separated by the comma.

Text in the table should have a **Single Line Spacing**. In large tables, it is recommended to reduce the letter size to **10 points**.
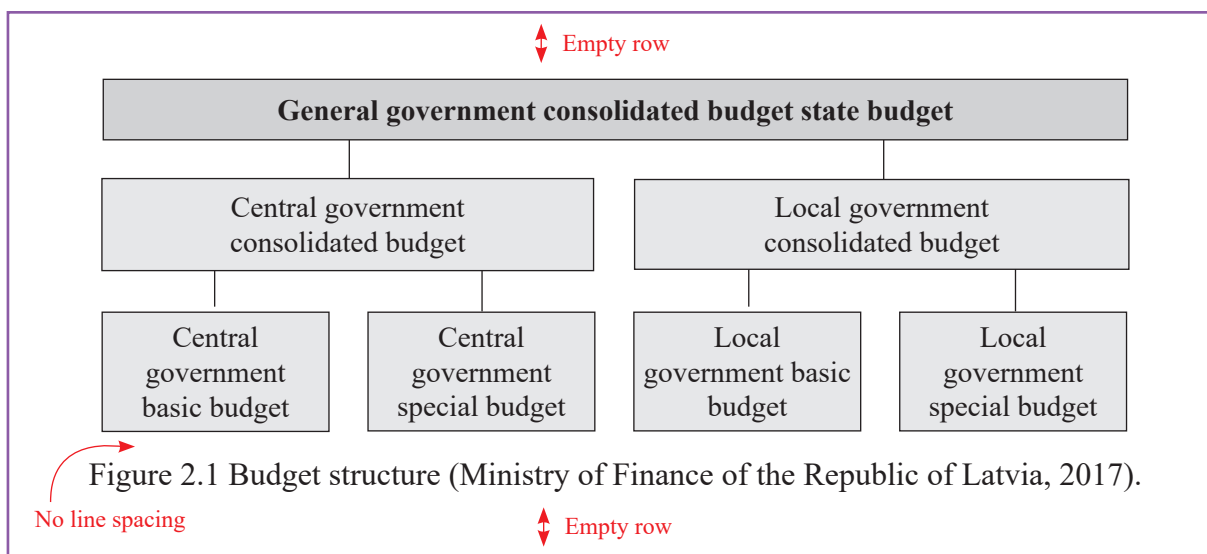
2.3. Figures

All illustrations – schemes, diagrams, charts, photos, logos, etc. – are called **Figures**. Figures should be directly related to the issues considered in the paper and their number should not be excessive. Certainly, the paper should look competent and professional; however, illustrations in the paper play a subordinate role in problem consideration. Figures should be presented as an auxiliary material to the interested parties facilitating understanding of the performed analysis.

Figures are numbered with Arabic numerals within the framework of the respective part. Every figure is given an appropriate name, which is provided below the figure in the same row with its number. The name of the figure is written with lowercase letters and a capitalized first letter, a full stop is added at the end.

The example below presents Figure 2.1, where the first number (2) stands for the number of the part and the second number (1) denotes the sequence number of the figure in the respective part, in this example – in the second part of the paper.

Example

Figure 2.1 Budget structure (Ministry of Finance of the Republic of Latvia, 2017).

Figures are placed in the paper immediately after a reference to them is made in the text. Figures are centred. When referring to the figures, their name is provided in the text or the abbreviation "Fig." with the number is provided in brackets.

Example

The structure of the state budget of the Republic of Latvia is presented in Figure 2.1.
or
The state budget structure of the Republic of Latvia is formed of the consolidated state budget and the budget of municipalities (see Fig. 2.1).

Example

Empty row

33 %

5 %

2 %

- Spot transactions
- Outright forwards
- Foreign exchange swaps
- Currency swaps
- FX options

46 %

14 %

Figure 2.2 Daily turnover in the foreign exchange by its segments (BIS, 2016).

Empty row
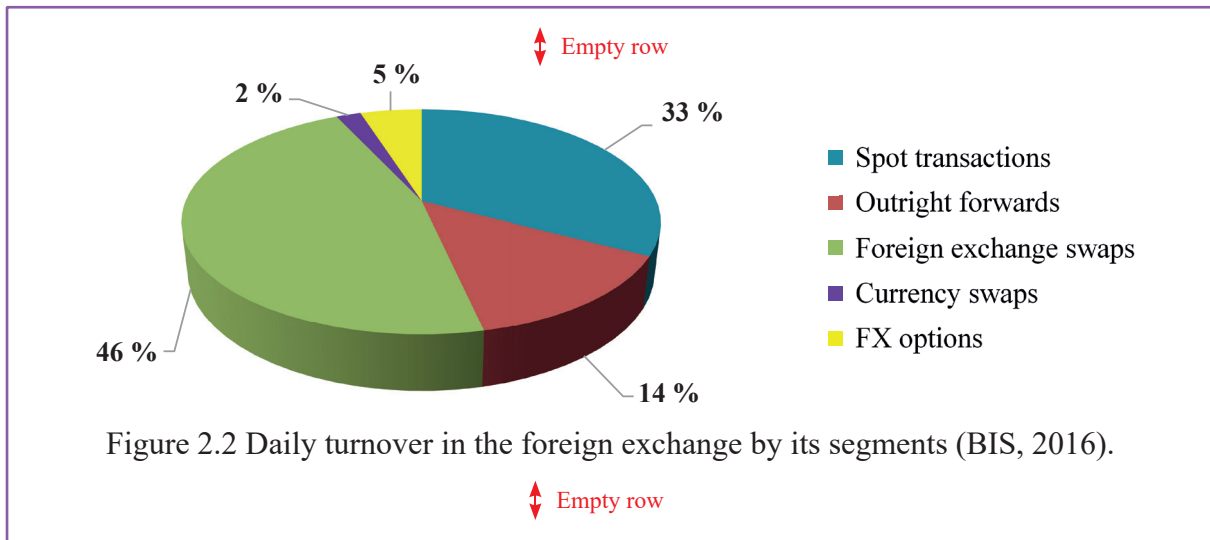
Example

The segments of the foreign exchange are presented in Figure 2.2.
or
There are five segments of the foreign exchange working as one united market (see Fig. 2.2).

Example

Empty row

Figure 2.3 Factors of importance when choosing a HEI (Lapina *et al.*, 2016, 269)

Empty row
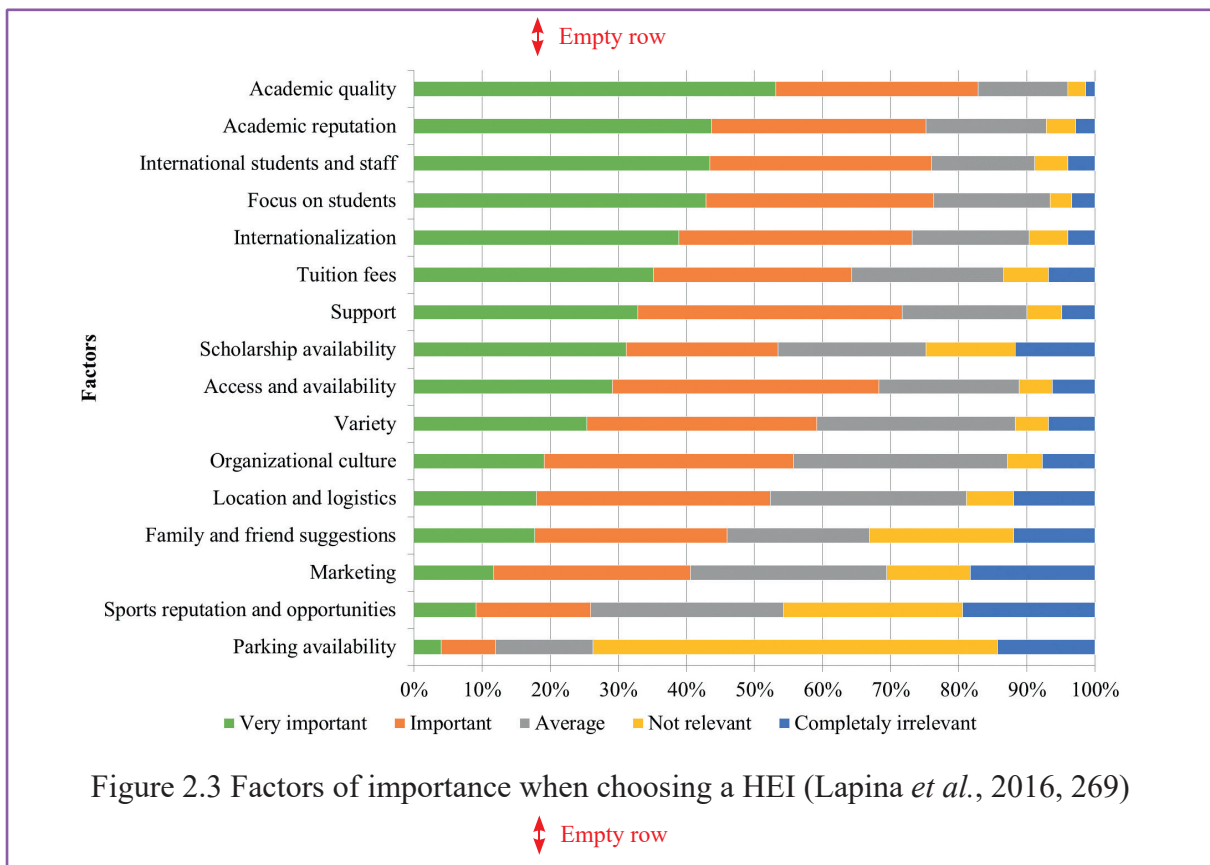
Example

> When choosing a HEI for their studies, foreign students acknowledge the following factors as the most important ones: academic quality and reputation, international students and staff as well as focus on students (or individual approach). Factors such as parking availability, sports reputation and opportunities, location in the periphery of the European union (EU) and exotic location are mostly considered of low importance or completely irrelevant (see Fig. 2.3).

Example

> After the financial crisis in 2008, the Latvian economy needed up to 7 years to achieve the pre-crisis level of GDP, and the migration processes has been improving all this time, resulting in decreasing but still negative net migration (see Fig. 2.4).
>
> Figure 2.4 Gross domestic product and long-term migration in Latvia from 2007 to 2015*
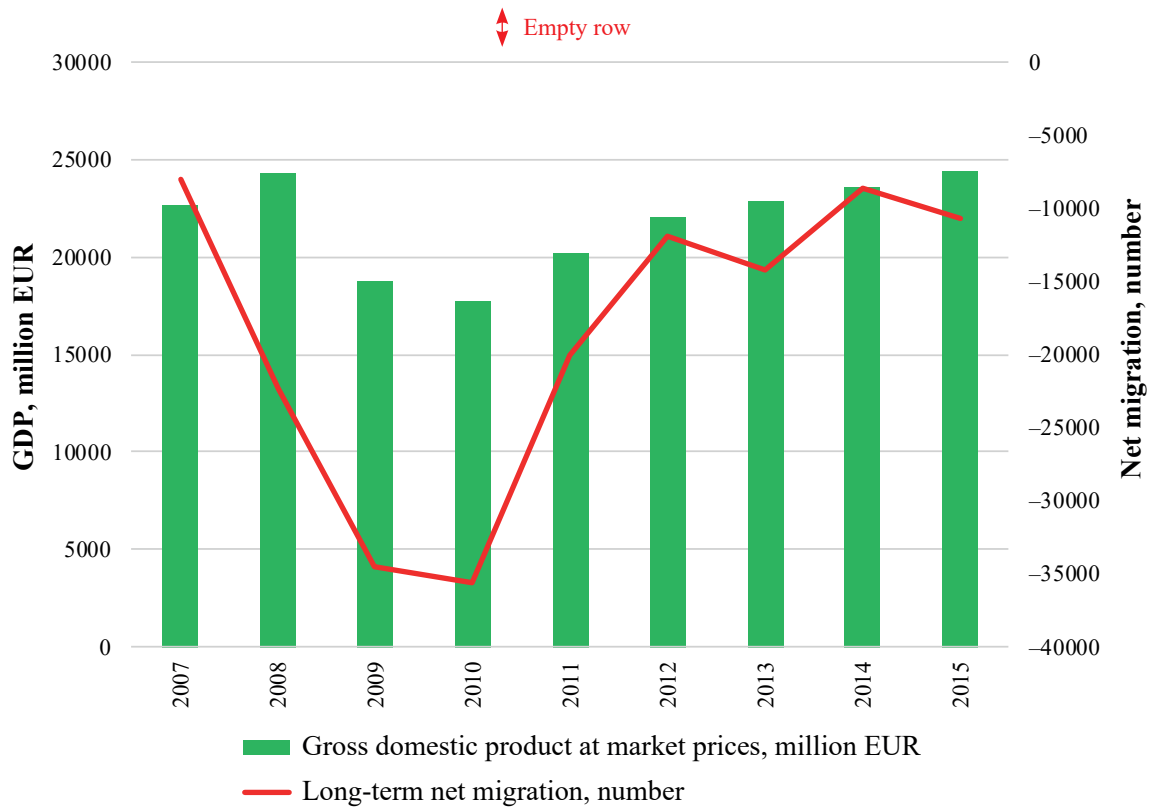
In case a figure or table is designed using more than one source, reference should be placed under the figure or table or in the footnote at the end of the page as shown considering Figure 2.4 as an example.

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* Based on

1. Eurostat database (2016) [online]. *Gross domestic product at market prices*. [accessed on 10 March 2016]. Available at: *http://appsso.eurostat.ec.europa.eu/nui/show.do?dataset=nama_10_gdp&lang=ne*

2. Central Statistical Bureau (2016) [online]. *Long-term net migration*. [accessed on 15 April 2016]. Available at: *http://data.csb.gov.lv/pxweb/en/Sociala/Sociala__ikgad__iedz__migr/IB0010.px/?rx-id=a79839fe-11ba-4ecd-8cc3-4035692c5fc8*

Large figures, which occupy more than 2/3 of a page, should be placed in Appendices providing the references to them and analysing them in the body of the paper. Figures should be placed in such a way that they can be viewed without turning the page. In exceptional cases, having received approval of the scientific adviser of the paper, larger figures can be used and the figure can be placed horizontally, occupying the entire page. Information provided in the figures should be analysed; two figures may not follow one another without analysis of the provided information.

The text in the figures should be arranged using a **Single Line Spacing**. Information provided in the figure should be written in the English language; the exception can be made for photos if approved by the paper scientific adviser or the methodological consultant. In large figures, it is recommended to reduce the letter size to **10 points**. For figures taken from literature or other sources, **a reference** to the original source **should be provided** in brackets after the name.

2.4. Formulas

Formulas used in the paper are numbered with Arabic numerals within the framework of the respective part. The formula number in brackets is written on the right of the page against the horizontal axis of the formula.

A formula forms an integral part of a sentence. A punctuation mark as required by the sentence structure (comma, semicolon, full stop, etc.) is put after it. A punctuation mark is put in the formula editor environment.

Example

GDP deflator can be estimated by Formula (2.1) (Skosples, 1):

$$GDP\ deflator = \frac{nominal\ GDP}{real\ GDP}. \qquad (2.1)$$

↕ Empty row

Symbols included in the formula should be decoded in the explication (explanation of the formula), which is provided immediately after the formula and its number, starting the first row with the word "where". It is written on the left side of the page, not putting a colon after it.

The unit of measurement of each value should be provided in the explanation to the formula, separating it with a comma. Unit of measurement of one and the same value should remain unchanged within the framework of the entire paper.

Example

The curvature risk charge for curvature risk factor k can be formally written as follows (Basel Committee on Banking Supervision, 2016, 17):

$$CVR_k = -min \begin{bmatrix} \sum_i \left\{ V_i \left(x_k^{(RW^{(curvature)})_+} \right) - V_i(x_k) - RW_k^{(curvature)} \cdot s_{ik} \right\} \\ \sum_i \left\{ V_i \left(x_k^{(RW^{(curvature)-})} \right) - V_i(x_k) + RW_k^{(curvature)} \cdot s_{ik} \right\} \end{bmatrix}, \quad (2.2)$$

where i – an instrument subject to curvature risks associated with risk factor k;

x_k – the current level of factor k;

$V_i(x_k)$ – the price of instrument i depending on the current level of risk factor k;

$V_i \left(x_k^{(RW^{(curvature)})_+} \right)$ and $V_i \left(x_k^{(RW^{(curvature)-})} \right)$ – both denote the price of instrument i after x_k is shifted upward and downward.

↕ Empty row

Example

The role of dummy variables in the regression can be considered in Formula (2.3) (Gujarati, 2011, 47):

$$Wage_i = B_1 + B_2 D_{2i} + B_3 D_{3i} + B_4 D_{4i} + B_5 Educ_i + B_6 Exper_i + u_i, \quad (2.3)$$

where $D_1, \ldots, D_4$, *Educ, Exper* – dummy variables;

$B_1, \ldots, B_6$ – coefficients to be estimated;

u – error term.

↕ Empty row

Referring to a formula in the text, its number should be provided in brackets.

Formulas used in the paper **should be accompanied** by corresponding **references** to the source where they are published.

2.5. References

In order to strengthen academic culture and honesty in the RTU academic environment, to clarify the concept of academic integrity and the related activities, and to define the main procedures in considering breaches of academic integrity, RTU Senate approved "The Code of Academic Integrity" of Riga Technical University on 29 February 2016.

Literal **copying** of the used **resources failing to provide a reference is not permitted** and is qualified as a breach of copyright. It is also not allowed to create a paper by copying fragments of the text from one or several sources in succession, when the paper author does not perform comparison and analysis of such text fragments or does not express his/her assessment and conclusions about the content. In any case, the volume of the quoted or copied text may not exceed the volume of the text produced by the paper author.

References can be done in two different ways, but **only one** form of referencing can be used **in one paper**.

Option 1 – the author's (authors') surname is provided in brackets in the text, then the first number denotes the year of publication of the used source and the second – the page number in this source.

When a reference is made to several sources, they are separated by a semicolon.

When the source of reference has two authors, both are named. When there are several authors, the first author is named and then the indication *et al.* is used.

Example

> (Šatrevičs, Gaile-Sarkane, 2015, 94)
>
> (Porter, 2008, 34; Lapina *et al.*, 2016, 269)

Option 2 – the author's (authors') surname and initials, work title, publishing house, publication place and year, page number are provided at the bottom of the corresponding page, in the footnote below the line. References are numbered on each page separately, starting with 1, or continuously throughout the entire paper (from 1 to *n*).

Example

> [1] Kotler, P. T. *et al.* (2017). *Marketing for Hospitality and Tourism*. 7th edition. London: Pearson Education Limited, p. 508
> [2] Witte, A. (2014). *Blending Spaces: Mediating and Assessing Intercultural Competence in the L2 Classroom*. Berlin: Walter de Gruyter GmbH & Co KG, p. 383.

When there are several references to the same work on one page, a full bibliographic description is provided in the first reference and later it is sufficient to write "*Ibid*", indicating also the number of the source page.

Example

> [1] Kotler, P. T. *et al.* (2017). *Marketing for Hospitality and Tourism*. 7th edition. London: Pearson Education Limited. p. 508
> [2] Ibid, p. 55

A precisely quoted text is put in the quotation marks and a reference is placed in the text at the name of the quoted author or at the end of the quote, behind the quotation marks and prior to a full stop. In order to highlight a word or phrase that is being discussed or directly quoted from somewhere else a student shall use single/double inverted commas.

Rendering of ideas of other authors are not enclosed in quotation marks; they should be objective and with no distortions. A reference preceded by a Latin abbreviation cf. is placed in the text at the name of the author mentioned or at the end of the sentence, prior to a full stop. When the reference pertains to several sentences or a paragraph, it is provided upon completion of the last sentence, after a full stop.

Numerical material, which is imported from statistical reports of companies, unpublished sources, etc. in the form of different data, calculations and charts and which is used in the paper, also should be accompanied with a reference, mentioning the data source(-s). It is done in conformity with instructions for bibliography and sources (see Appendix 5). When the author's calculations are included in the paper, the data source, where numerical data used in the calculations can be found, are provided in the reference section.

3. Formatting the List of References

Compiling **the List of References**, bibliographic conventions for referencing should be observed. Sources are presented in the language they are written, and they are grouped in the **alphabetical order** according to the surname of the author or the first letter of the title of the work (material). The list is started with the sources in accordance with the Latin alphabet order followed by the sources in the Cyrillic alphabet order. Bibliography and other sources written in Russian are grouped separately, as the sequence of letters in Latin and Cyrillic alphabets differ.

The list should include all sources of information used in the paper in the alphabetical order (see Appendix 5). Sources in the references are provided in the original language, either the Latin or Cyrillic alphabet. When a reference is provided to a source published in other languages (except for English or Russian), for example, Arabic or Chinese, the reference should be transliterated in the letters of Latin alphabet.

Referring to a text where pages are numbered, the number of the specific page, where the information has been taken, shall be provided in the reference.

The total number of pages shall be provided in the List of References. Abbreviation of the word *page*, similarly to the source, shall be used in the original language of the source.

Example

40 lpp. or 40 стр., or 40 p.

The List of References is drawn using **Single Line Spacing** between the rows of one source description; the spacing between different sources is one **Spacing** of 6 pt.

3.1. Books

Data about books (monographs, textbooks, manuals, summaries of doctoral theses, etc.) should be provided as follows:

The author's (authors') surname, initials. (Year of publication in brackets). *Title of the book (in Italic)*. Issue (if required). Place of publication: Publisher. Volume or total number of pages. Full stop at the end.

For an e-book, a reference to the website is provided as well: Available at: <URL>

Reference to a book by one author

The reference to the book in the body of the paper is provided as follows:

> The process of achieving the national and regional energy efficiency targets involves several systems, therefore, use of the process approach allows gear them to a closer cooperation (Actiņa, 2015, 26).

> The e-market is characterized by industrial and technological convergence, disappearance of physical boundaries, changes in consumer and retailer demands, smart and creative industry competition, etc. (Sceulovs, 2015, 19).

> Today, science enjoys hiding behind an ivory wall built here from mathematics, there from Latin or Greek, from history, from axioms, and other sacred rituals, so scientists can enjoy undeserved sanctuary from critics from other fields and the public (Sedláček, 2011, 11).

The entry in the List of References shall be presented as follows:

Example

Actiņa, G. (2015). *Development System of Energy Efficient Processes in Latvia. Summary of Doctoral Thesis.* Riga: RTU Press. 70 p.

Sceulovs, D. (2015). *Use of Electronic Environment in Entrepreneurship Development. Summary of Doctoral Thesis*. Riga: RTU Press. 47 p.

Sedláček, T. (2011). *Economics of Good and Evil: The Quest for Economic Meaning from Gilgamesh to Wall Street*. New York: Oxford University Press. 11 p.

Other examples

Friedman, T. L. (2006). *The World is Flat.* London: Penguin Books. 600 p.

Kaftan, M. (2005). *Modern Business English in E-commerce.* Prague: LEDA Publishing House. 288 p.

Porter, M. (2008). *On Competition: Updated and Expanded Edition.* Boston, MA: Harvard Business School Pub. 544 p.

Reference to a book by 2–3 authors

The reference to the book in the body of the paper is provided as follows:

> Almost every company has "tribal elders" who possess unique expertise in their field and a deep knowledge of the organization (Schmidt *et al.*, 2014, 183).

> Cost accounting provides information for both management accounting and financial accounting professional (Horngren *et al*., 2015, 4).

> Language of science as a language for specific purposes (LSP) is defined as the language "used for particular and restricted types of communication", containing "lexical, grammar and other linguistic features which are different from ordinary language" (Richards *et al*., 1985, 159).

The entry in the List of References shall be presented as follows:

Example

Horngren, C. T., Srikant, M. D., Madhav V. R. (2015). *Cost Accounting: A Managerial Emphasis*. 15th edition. Boston: Pearson. 960 p.

Schmidt, E., Rosenberg, J., Eagle, A. (2014). *How Google Works*. London: John Murray (Publishers). 352 p.

Richards, J., Platt, J., Weber, H. (1985). *Longman Dictionary of Applied Linguistics.* Harlow: Longman. 159 p.

Other examples

> Laudon, K. C, Traver, C. G. (2015). *E-Commerce 2016: Business, Technology, Society*. Boston: Pearson. 905 p.
>
> Horngren, C. T., Srikant, M. D. (2003). *Cost Accounting: A Managerial Emphasis*. 11th edition. New Jersey: Prentice Hall. 880 p.
>
> Гапоненко, А., Орлова, Т. (2008). *Управление знаниями*. Москва: Эксмо. 550 стр.

Reference to a book by more than three authors

The reference to the book in the body of the paper is provided as follows:

> To compete in this aggressive environment, companies must shift their focus from driving transactions to maximizing customer lifetime value. That means making products and brands subservient to long-term customer relationships. (Christensen *et al.*, 2013, 1).

> Texts often exhibit the conventions of more than one genre. John Hartley notes that 'the same text can belong to different genres in different countries or times' (O'Sullivan *et al.*, 1994, 129).

The entry in the List of References shall be presented as follows:

Example

> Christensen, C. M. *et al*. (2013). *HBR's 10 Must Reads. On Strategic Marketing*. Boston: Harvard Business Review Press. 256 p.
>
> O'Sullivan, T. *et al*. (1994). *Key Concepts in Communication and Cultural Studies*. London: Routledge. 367 p.

Other examples

> Kotler, P. T. *et al*. (2016). *Marketing for Hospitality and Tourism*. 7th edition. Boston: Pearson. 688 p.
>
> Carson, D. *et al*. (2001). *Qualitative Marketing Research*. London: Sage. 256 p.

If the reference is provided to the book, which is a collection of articles or a work of a team of authors, it is included in the List of References in accordance with the first letter of its title; the notation "edited by..." is provided after the title.

The entry in the List of References shall be presented as follows:

Example

> *The Routledge Handbook of Corpus Linguistics* (2010). Edited by: A. O'Keeffe and M. McCarthy. London; New York: Routledge. 682 p.

3.2. Scientific Articles and Abstracts

Data about articles in scientific journals should be provided as follows:

The author's (authors') surname, initials. (Year of publication in brackets). Title of the article. *Title of the publication* (*in Italic*), issue, volume of the article (pages from-to).

Reference in English

The reference to the article in the body of the paper is provided as follows:

> Detailed analysis demonstrated that such result is due to influence of some individual countries. For example in the "Debt Clock" group, Brasilia and India have relatively small debt (about 66%) but spend nearly 24% of the collected taxes for the debt service (Semjonova, 2015, 237).

> The implementation of the transdisciplinary paradigm becomes even more complicated in the multilingual setting, as the "communication strategies that are convincing in one language culture may be regarded as suspicious in another" (Junge, 2011, 209).

The entry in the List of References shall be presented as follows:

Example

Semjonova, N. (2015). Assessment of the Government Debt Position Impact on the General Taxation Policy. *Economic Science for Rural Development,* Vol. 37, pp. 232–240.

Junge, S. (2011). Corporate Rhetoric in English and Japanese Business Reports. *Multilingual Discourse Production: Diachronic and Synchronic Perspective*, edited by Kranich, S. et al. Hamburg Studies on Multilingualism, Vol. 12. John Benjamins Publishing, pp. 207–232.

The reference to the article in the body of the paper is provided as follows:

> The quality of the academic staff and study programmes are the most important factors in creating value for the student (Lapina *et al.*, 2016, 275).

The entry in the List of References shall be presented as follows:

Example

Lapina, I., Roga, R., Müürsepp, P. (2016). Quality of Higher Education: International Students' Satisfaction and Learning Experience. *International Journal of Quality and Service Sciences*, Vol. 8 Iss. 3, pp. 263–278.

Reference in the Language other than the Language of the Paper

If the author quotes the sources written in the languages other than the language of the paper, it is necessary to specify whether the quote was translated by the author him/herself.

The reference to the article in the body of the paper is provided as follows:

> In Latvia, not all municipal incomes are included in the calculation of financial equalization of municipalities. This does not pertain to performance efficiency of municipalities; rather, the volume of contributions to the financial equalization fund is calculated only for the municipalities, whose forecasted incomes exceed the unequalized limit of the financial necessity. (Шенфелде, Янсоне, 2012, 390, *author's translation*)

The entry in the List of References shall be presented as follows:

Example

> Шенфелде, М., Янсоне, С. (2012). Финансовое выравнивание самоуправлений Латвии как фактор их развития. *Проблемы развития внешнеэкономических связей и привлечения иностранных инвестиций: региональный аспект*, № 1, стр. 387–395.

Data about articles in conference proceedings and books of conference theses should be provided as follows:

The author's (authors') surname, initials. (Year of publication in brackets). Title of the article in the source language. *Title of the publication and the conference, issue (if required), date, month, year (in Italic)*. City: Publisher, volume of the article (pages from-to).

Reference in English

The reference to the article in the body of the paper is provided as follows:

> The organization development integrity and awareness of its complexity have always been in the focus of attention. The changing environment has significantly influenced all companies worldwide, demonstrating that development issues at the time of changes of the organization anticipate a different approach. (Šatrevičs, Gaile-Sarkane, 2015, 96)

The entry in the List of References shall be presented as follows:

Example

> Šatrevičs, V., Gaile-Sarkane, E. (2015). Strategic Fit Relation Model as a Tool for Organization Development. *Proceedings of the 19th World Multi-Conference on Systemics, Cybernetics and Informatics* (*WMSCI 2015*)*, July 12–15, 2015.* Florida: International Institute of Informatics and Systemics, pp. 94–99.

Reference in the Language other than the Language of the Paper

The reference to the article in the body of the paper is provided as follows:

> Comprehensive control and reduction of the work environment risks to the acceptable level can be reached only when employers appoint the persons responsible for implementation of the respective measures, and when employees are informed about the work environment risk factors and their possible consequences. (Иевинс и. др., 2013, 116, author's translation)

The entry in the List of References shall be presented as follows:

Example

> Иевинс, Я., Бартусаускис, Я., Мелько, А. (2013). Система охраны труда в Латвии, проблемы и их решение. *Международный экологический конгресс "Ecology and Life Protection of Industrial-Transport Complexes", 18–22 сентябрь, 2013*. Тольятти: Тольяттинский государственный университет, стр. 115–123.

3.3. Internet Sources

Materials obtained from the Internet are presented as bibliographic references to e-re-sources. It is also required to provide further sites proceeding from the address. Often it is not possible to determine the year of publication and the publisher. However, these elements are recommended and they should be provided whenever possible.

The author's (authors') surname, initials. (Year of publication of the source). *Title in the source language* (*in Italic*). Publisher or reference source holder, or the webpage name [date of viewing the source]. Available at: <URL>

When it is not possible to mention a specific author, the name of the source is used.

Title in the source language (*in Italic*) (Year of publication of the source) [online]. Publisher or reference source holder, or the webpage name [date of viewing the source]. Available at: <URL>

Reference in English

The reference to the resource in the body of the paper is provided as follows:

> The EU Customs Competency Framework will provide a clear and consensus view of the skills and knowledge required by Customs professionals in Europe at all levels and in all skill areas both technical and non-technical (Reisner, 2013).

> Machine translation replaces fully human translation and the translator becomes a mere post-editor, the skills expected of translators are certain to change as well (Pym, 2012, 1).

The entry in the List of References shall be presented as follows:

Example

> Reisner, B. (2013). *EU Competency Framework for the Customs profession* [online]. PICARD Conference in St. Petersburg, 18–20 September 2013 [accessed on 17 November 2013]. Available at: *http://www.wcoomd.org/en/events/event-history/2013/wco-picard-conference-2013/~/media/ 09569F05EF4240D6A5CCE0327CEF03CC.ashx*
>
> Pym, A. (2012). *Translation Skill Sets in a Machine Translation Age* [online]. Universitat Rovira i Virgili, Tarragona: Spain (InterCultural Studies Group). [accessed on 10 March 2016]. Available at: *http://usuaris.tinet.cat/apym/on-line/training/2012_competence_pym. pdf*

Providing a reference to the Internet source, when it is not possible to refer to a particular author

The reference to the resource in the body of the paper is provided as follows:

> Section 2. Scope of Application of the Law (The Commercial Law, 2002):
> (1) A merchant is a natural person (individual merchant) or a commercial company (partnership and capital company) registered with the Commercial Register.

> (2) Commercial activity is an open economic activity, which is performed by merchants in their name for the purposes of gaining a profit. Commercial activity is one of the types of entrepreneurial activity.
>
> (3) Economic activities are any systematic, independent activities for remuneration.
>
> (4) In this Law it may be specified that particular types of economic activities may only be performed by a merchant. The status of a merchant may be granted by law also to other persons.

The entry in the List of References shall be presented as follows:

Example

> *The Commercial Law* (2002) [online]. Law of the Republic of Latvia, adopted in Riga on 14 February 2002, Latvijas Vēstnesis website [accessed on 26 March 2017]. Available at: *https://likumi.lv/ta/id/5490-komerclikums*

The reference to the resource in the body of the paper is provided as follows:

> Specialists of the Ministry of Economics have prepared the current Report on Development of the Latvian National Economy. The first Report was issued in September 1994, the following ones since 1995 are traditionally issued twice a year – in June and December. Similarly to the previous Reports, the current Report provides evaluation of the situation in the national economy, as well as forecasts prospects of economic development. (Evaluation Regulations of the Preparation and Impact of the Development Planning Documents, 2014).

The entry in the List of References shall be presented as follows:

Example

> *Evaluation Regulations of the Preparation and Impact of the Development Planning Documents* (2014) [online]. Regulations of the Cabinet of Ministers of the Republic of Latvia No. 737, adopted in Riga on 2 December 2014, Latvijas Vēstnesis, Website: Likumi.lv [accessed on 31 January 2015]. Available at: *http://likumi.lv/doc.php?id=270934*

Providing a reference to several Internet sources

The reference to the resources in the body of the paper is provided as follows:

> One of the tasks of the State Revenue Service is to identify criminal activities in the field of state taxes and other mandatory payments (State Revenue Service Business Strategy, 2014). A significant aspect of the process that should be considered is the origin of incomes of residents and civil servants. To legalize funds, money laundering schemes are quite frequently used. The Baltic Centre for Investigative Journalism has updated the contribution of banks in this area (Jenberga, Puriņa, 2016).

The entry in the List of References shall be presented as follows:

Example

> *State Revenue Service Business Strategy for 2014−2016* (2014) [online]. State Revenue Service website [accessed on 3 February 2016]. Available at: *https://www.vid.gov.lv/default.aspx?tabid=4&id=684&hl=1*
>
> Jenberga, S., Puriņa, E. (2016). *U.S. Pressures Latvia to Clean Up Its Non-Resident Banks* [online]. Re:Baltica – The Baltic Centre for Investigative Journalism [accessed 4 February 2016]. Available at: *http://www.rebaltica.lv/en/investigations/dirty_money/a/1316/u_s__pressures_latvia_to_clean_up_its_non-resident_banks.html*

3.4. Dictionaries

The reference to the printed sources in the body of the paper is provided as the reference to the book:

> In both English and Latvian the lexical unit *head* (Latv.: *galva*) is one of the rare instances when metaphoric meaning transfer is used in term formation, for example in civil engineering the terms *head of pile (Latv. Pāļa galva)* (Krauklis, 2003, 582).

The entry in the List of References shall be presented as follows:

Example

> Green, J. (2010). *Green's Dictionary of Slang*. UK: Chambers.
>
> Krauklis, V. (2003). *Dictionary of Terms in Civil Engineering//Celtniecības terminu vārdnīca.* Rīga: Telamons. 1327 p.

In order to promote readability of the text the author may ascribe abbreviations to the digital and online sources (e.g. dictionary, glossary, thesaurus or database) used in the paper and listed in the references.

A headword of the entry cited from any dictionary, glossary, thesaurus or database should be given in the single or double quotation marks and followed by reference information provided in the square brackets:

- number and/or letter of definition of the entry (if multiple)
- title of the source (in italics)

The reference to the digital and online sources is provided as follows:

> The metaphoric terms that are based on the concept "LEG" [Def.2a, *MW*] include *air leg, feed leg, nose undercarriage leg, batter leg tower, sheer leg*, *guy leg,* etc.

The entry in the List of References shall contain full URL of the site (up to including the file name or the full link) and the date, when the source was accessed. It should be presented as follows:

Example

> **MW** – Merriam-Webster Dictionary [online]. Available at https://www.merriam-webster.com/dictionary/leg [accessed on 8 February 2017]

3.5. Standards

Data on the published official standards and references to them should be presented in conformity with the specific standard and its type. The original version of the standard should be used, rather than the reflection on them made by another author or a group of authors.

Standards approved by organizations or standardization bureaus and published on the Internet

Title of the standard in the source language (*in Italic*) (Year of publication of the standard) [online]. Publisher or standard holder, pages (if can be provided) [date of viewing the source]. Available at: <URL>

The reference to the standard in the body of the paper is provided as follows:

> This standard is based on a number of quality management principles including a strong customer focus, the motivation and implication of top management, the process approach and continual improvement (ISO 9001:2015, 2015).

> Currently, ISO/TC 37 works on establishing the basic principles and methods for preparing and compiling terminologies both inside and outside the framework of standardization, and describes the links between objects, concepts, and their terminological representations. It also establishes general principles governing the formation of designations and the formulation of definitions. (ISO/TC 37).

The entry in the List of References shall be presented as follows:

Example

> *ISO 9001:2015 – Quality Management* [online]. International Organization for Standardization [accessed on 18 March 2016]. Available at: *http://www.iso.org/iso/home/standards/management-standards/iso_9000.htm*
>
> *ISO/IEC 2382-37 – Terminology Standards* [online]. The International Organization for Standardization [accessed on 3 April 2016]. Available at: *http://www.iso.org/*

Standards issued and approved in accordance with laws or other regulatory enactments

Title of the standard in the source language (*in Italic*) (Year of publication of the standard) [online]. Publisher or standard holder, pages (if can be provided) [date of viewing the source]. Available at: <URL>

The reference to the standard in the body of the paper is provided as follows:

> In accordance with the Latvian Accounting Standard No.11 (2010), Clause 8, "Costs of reserves include all acquisition, manufacturing and other expenses, which are incurred delivering reserves to their current location and condition."

The entry in the List of References shall be presented as follows:

Example

Latvian Accounting Standard No. 11 "Reserves" (2010) [online]. Adopted with the resolution of the Accounting Council on 8 September 2010, Latvijas Vēstnesis website [accessed on 18 March 2016]. Available at: *http://likumi.lv/doc.php?id=221422*

Standards published as a book

The reference to the standard, which is summarized and published as a book, when the author or a team of authors is known, is made in accordance with the guidelines for referencing books. When a standard is issued as an e-book, the reference is drawn up in accordance with the guidelines for referencing e-books.

The reference to the standard in the body of the paper is provided as follows:

> Access control and road charging systems may also use optical number plate recognition (Williams, 2008, 86).

The entry in the List of References shall be presented as follows:

Example

Williams, B. (2008). *Intelligent Transport System Standards*. Boston, London: Artech House. 817 p.

3.6. Company Materials, Interviews and Other Sources

Developing study and graduate papers, the so-called "unpublished materials" are often used, i.e. internal limited access materials of a company, interviews taken by the author of the paper or other persons, Bachelor, Master and other graduate papers publicly available at universities, materials of different seminars, etc. Such materials are presented similarly to other aforementioned materials, such as books, journal publications, Internet sources, etc.

Company materials

Title of the material (year). Company name and other specific information (if applicable). Volume of the material (number of pages).

The reference to the company materials in the body of the paper is provided as follows:

> *Eiklīda* Ltd considerably expanded in 2015, which is confirmed by the increase in the value of all balance sheet items, some of them demonstrated very impressive growth. The biggest growth has been observed in the amount of accounts receivable, which has grown by over 18 times – from EUR 1,821 to EUR 33,230. (Eiklīda, Ltd, Annual Report, 2016)

The entry in the List of References shall be presented as follows:

Example

> Eiklīda, Ltd. *Annual Report* (2016). Eiklīda Ltd accounting materials. 65 p.

Bachelor and Master Papers publicly available at universities

The author's surname, initials. (Year). *Title of the paper* (*in Italic*). Paper type. Place: University. Paper volume or total number of pages.

The reference to the graduate paper in the body of the paper is provided as follows:

> Latvia is largely dependent on foreign suppliers of solid, liquid and gas fuels. Yet the total energy dependence is lower than what might be expected. This is because of the fact that the country's own energy production from renewables is rather high. Renewable energy is largely generated within the country and the consumption per industry shows the share of use (de Linde, 2016).

The entry in the List of References shall be presented as follows:

Example

> de Linde, S. (2016). *Overcoming market barriers and promoting deep renovation of multifamily residential buildings in Latvia.* Master Thesis. Riga: Riga Technical University. 97 p.

Interview

Surname, initials of the interviewee. (Year, date, month). *Theme/name of the interview* (*in Italic*). Surname, initials of the interviewer.

The reference to the interview in the body of the paper is provided as follows:

> K. Balodis (Interview, 8 January 2016) mentioned three main challenges for entrepreneurs in small towns of Latvia, indicating that quite often solutions fall within the scope of authority of local municipalities.

The entry in the List of References shall be presented as follows:

Example

> Balodis, K. (8 January 2016). *Entrepreneurship Opportunities in Small Towns.* (Interviewed by I. Odziņa).

Handouts and presentation materials of seminars and conferences

The author's surname, initials. (Year, date). *Title and type of the material*. Name of the conference or seminar.

The reference to handouts and presentation materials in the body of the paper is provided as follows:

> Digital world brings several opportunities for education – unlimited access to information, new wave of technology innovation such as Internet of Things and Big Data possibilities. But it also caries challenges like digital gap, lack of proper methodology and unevenly developed infrastructure. (Urva, 29 September 2016)

The entry in the List of References shall be presented as follows:

Example

Urva, E. (29 September 2016). *Opportunities and challenges the increasingly digital world brings to educators*. "Management Education for a Digital World" 24th CEEMAN Annual Conference.

4. Drawing up the List of References

The List of References is usually located at the end of the paper. It lists the sources, which were viewed or cited developing the paper. *Microsoft Office Word*, starting with 2007 version, can automatically create a list of references and provide referencing.

Creating a new source of reference, the entire information about it is stored in the computer memory so that any created reference can be located and used repeatedly in other study works.

4.1. Adding a New Quotation and Reference to a Document

When adding a new quotation to a document, a new reference is created, which will be seen in the List of References.

1. In the **References** tab of the **Citations & Bibliography** group, click on the pointer located next to **Style**. Click on the style you wish to use for citations and references. For example, *MLA* or *APA* style is usually used for citations and references in the documents on social sciences.
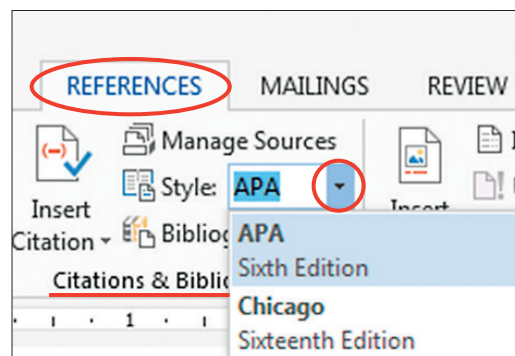
Figure 4.1 Choice of style.

2. Click on the end of a sentence or phrase you wish to quote. In the **References** tab of the **Citations & Bibliography** group, click **Insert Citation**.
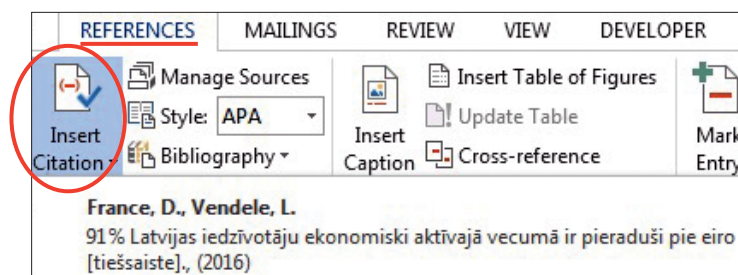
Figure 4.2 Adding a reference.

As a result, a reference in the text will look as follows: (France, Vendele, 2016).

4.2. Adding a New Source

To add information on a new source, click **Add New Source**.
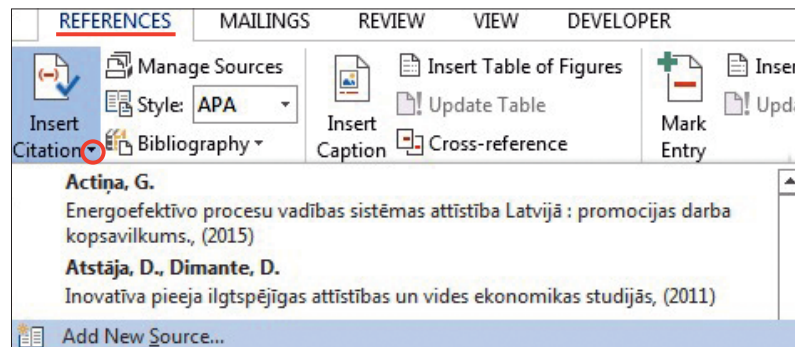
Figure 4.3 Adding a new source.

Click on the pointer next to the **Type of Source** caption, start completing the source information. For example, a source can be a book, a report or a webpage. Insert bibliographic information about the source.
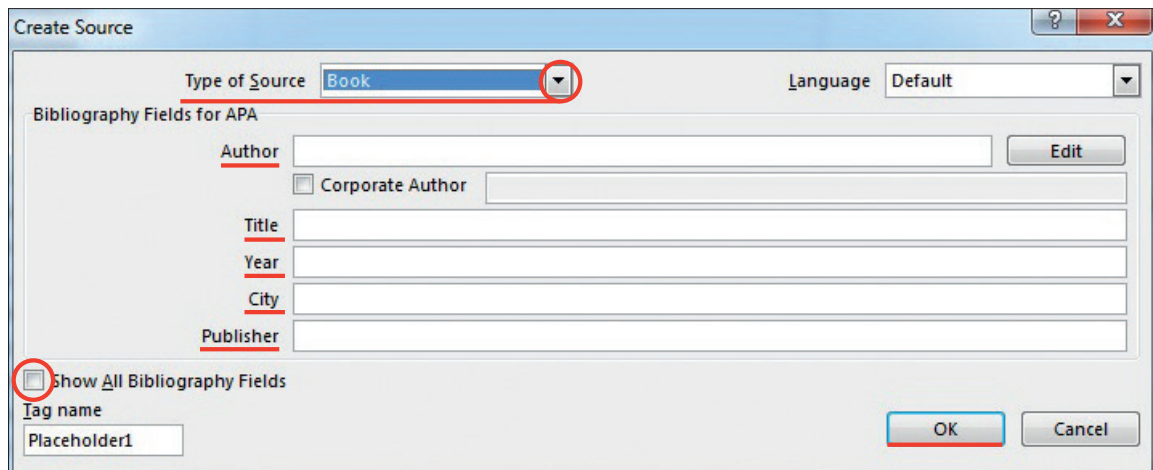
Figure 4.4 Information about a source.

To add more information about the source, select the check box **Show All Bibliography Fields**.

4.3. Finding a Source

Quite a long list of viewed and quoted sources can be drawn up. Using the **Manage Sources** command, a source, which is quoted in another document, can be found.

In the **References** tab of the **Citations & Bibliography** group, click **Manage Sources**.
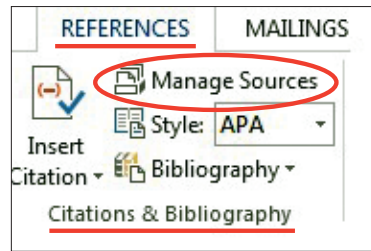
Figure 4.5 Source management.

To find the required source, perform one of the following operations:

• In the sorting window (***Sort by …***), sort by the author, name, quotation name or year and then search for the resulting list for the required source;

• In the window **Search**, put the name or author of the searched source. The list will become considerably narrower to match the searched term.
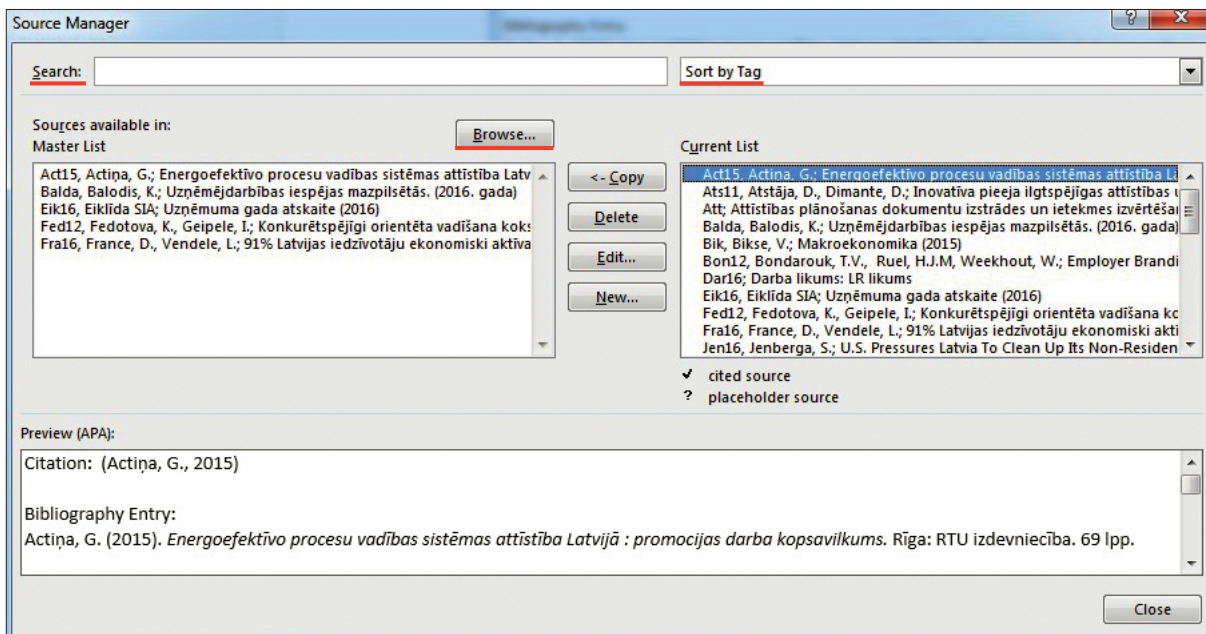
Figure 4.6 Search for a source.

In the dialog window **Source Manager**, click **Browse** to select another main list to import new sources. For example, you can establish connection with a shared file, a computer of a research colleague, a server or webpage, which is used by the university or research institution.

4.4. Editing a Citation Placeholder

You might wish to create a placeholder citation and later fully complete bibliographic information about the source. All changes you make in the source will be automatically reflected in the bibliography, if it has already been created. A question mark will appear in the Source Manager next to the placeholder sources.

In the **References** tab of the **Citations & Bibliography** group, click **Manage Sources**. In the **Master List** section, click on the placeholder you wish to edit. Click *Edit*.

When clicking on the pointer next to the **Type of Source** caption, start completing the source information. For example, a source can be a book, a report or a webpage.

Figure 4.7 Editing source information.

To add more information about the source, select the check box **Show All Bibliography Fields**.

Figure 4.8 Adding more information.

4.5. Drawing up the List

The List of References can be created at any time, when one or several sources are placed in the document. If you do not have all information required to describe a source in order to create a full citation, you can use a placeholder citation and complete the source information later.

Click on the place where you wish to put the List of References. Usually such list is located at the end of the document. In the **References** tab of the **Citations & Bibliography** group, click **Bibliography**.
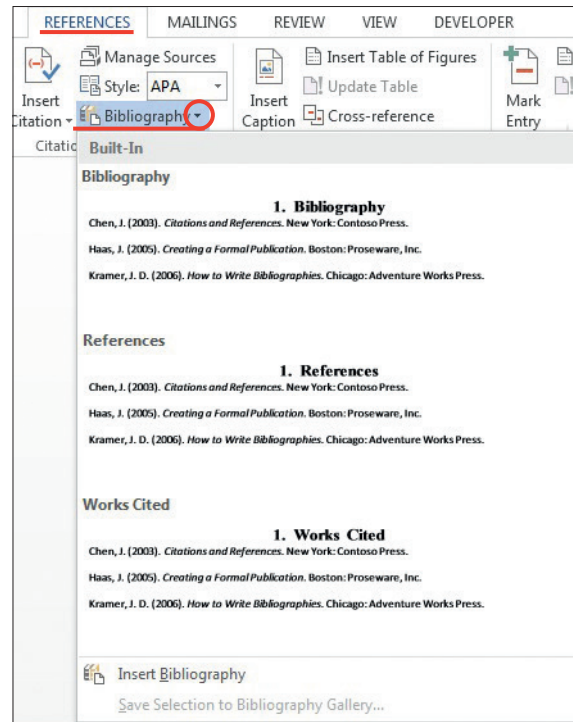
Figure 4.9 Creation of bibliographic content.

To place the bibliographic list in the document, click on the previously determined bibliographic list format.

5. Management of the List of References using *Mendeley* Tool

Mendeley is a free tool, which allows managing one's library by providing the following functions:

- to add PDF files to one's library;
- to import/export files from other bibliography management tools, for example, *EndNote*, *BibTex,* and *RIS*;
- to find documents online using document identifier (for example, DOI) or document name and add them to one's library;
- to import references with one click from the webpage opened in the browser, for example, *EBSCO* or *SpringerLink,* etc.;
- to manage one's documents and bibliographic references;
- to add bibliographic references according to the chosen citation standard in *MS Word* and *Open Office* documents and automatically create a list of bibliographic references;
- to share documents in the *Mendeley* social network.

5.1. User Registration

To be able to use opportunities provided by *Mendeley*, it is necessary to register on *Mendeley* webpage *www.mendeley.com.* When registering, it is recommended to use your RTU e-mail in order to be able to use all advantages provided by the university.

Mendeley tool has several user interfaces:

- *Mendey Web* – social network for cooperation and communication with other researchers, shared use of documents, creation of own research group library;
- *Mendeley Desktop* application, which should be installed on the computer. *Mendeley Desktop* application provides opportunities to manage one's library and references. Synchronization between *Mendeley Web* and the local application is provided;
- *Mendeley Mobile* – application for mobile devices with limited functionality in comparison with *Mendeley Desktop*, it is envisioned for document reading and search, rather than for their processing.

5.2. Library Creation

Mendeley tool provides opportunity to create a library of sources, with or without full texts. This tool can be used both to collect bibliographic information on the read papers and to form a list of unread papers. Using the tool, one can group sources in a simple way, update source descriptions, automatically import descriptions of the sources from PDF files and internet resources.

PDF is the most common source file format, that is the reason why *Mendeley* tool provides ample opportunities to work with this format.

PDF files can be added to your library by clicking on **Add Files** or by using the **Drag & Drop** function when putting a file in the **All Documents** list.
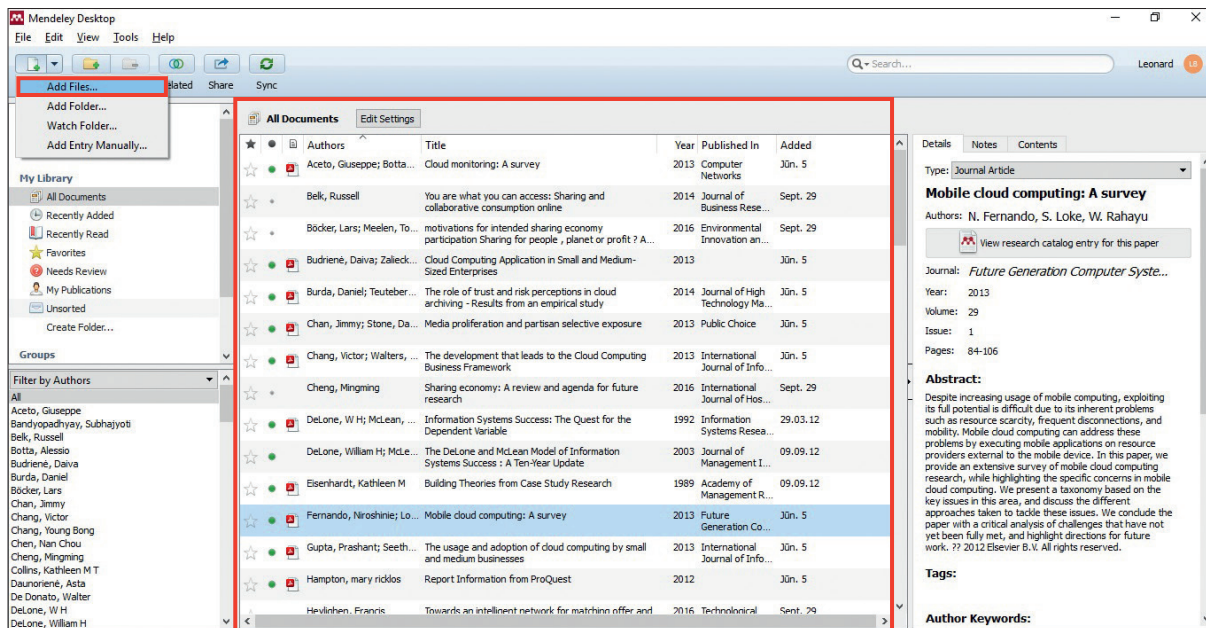
Figure 5.1 Adding a PDF file.

Mendeley will automatically try to determine bibliographic data of the attached PDF document – name, publication year, pages.
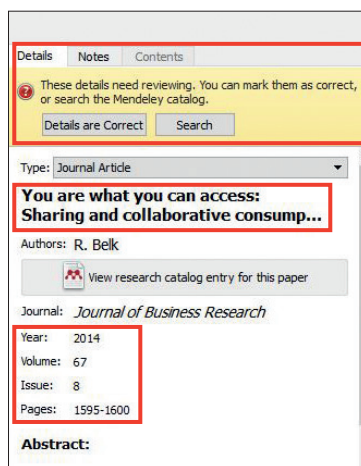

Figure 5.2 Automatic determining of the bibliographic data.

If all bibliographic data are full and correct, you can click **Details are Correct**. Alternatively, you can click **Search**, and then *Mendeley* will try to find information about this document online and supplement it. The user can also supplement the missing information himself/herself, if *Mendeley* fails to provide full bibliographic data.

It is recommended to complete the DOI field, when a document is ascribed a DOI. When using DOI, *Mendeley* can obtain the missing bibliographic data. It is recommended to provide as much bibliographic data as possible, as they will be of use later, when references and a list of references are drawn up automatically.

Mendeley provides opportunity to import/export documents from other bibliographic reference tools, for example, *EndNote*, *BibTex* and *RIS*.

Another opportunity to add documents to your library is to enter the document ID, for example, DOI, and make *Mendeley* find documents online. Choose **File / Add Entry Manually** and enter DOI. Click on a button, which resembles a magnifying glass, and *Mendeley* will find the document. Click **Save** and the document will be saved in the *Mendeley* library.
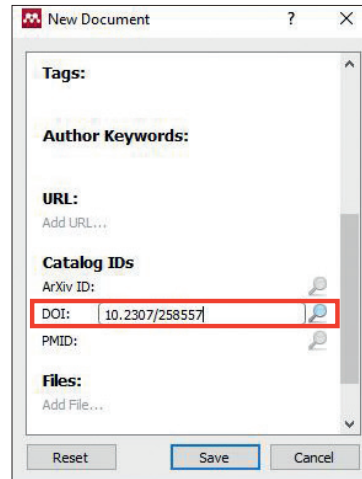
Figure 5.3 Adding a source using DOI.

File / Add Entry Manually can be used to enter descriptions of other sources. When using the tool, the type of source should be selected and the required fields completed.
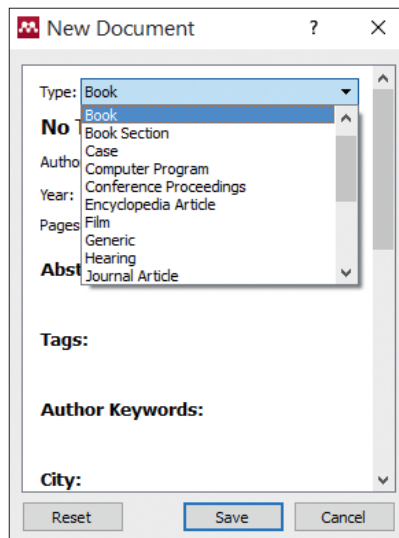
Figure 5.4 Adding different sources using *Add Entry Manually*.

It is possible to add documents to your library also from a websites opened in a browser. For example, when an article, which you want to use in your paper, is opened in the IEEE database, you can import it into your *Mendeley* library by one click. This function is called **One-Click Web Importer**.

First, the tool should be activated from the **Tools / Install Web Importer** menu.
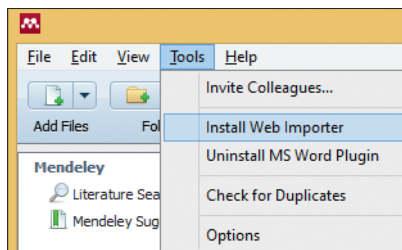
Figure 5.5 Activation of the *Web Importer* tool.

The manual will provide explanations how *Web Importer* operates in different browsers – it should be added to the pinned browser bookmarks and should be called out, when import from an open webpage is needed.

For example, a publication to be quoted in your paper is open in the IEEE database. There is **Save to Mendeley** button in the bookmark browser, which should be clicked.
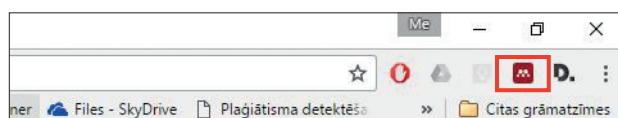

Figure 5.6 Saving bibliographic data from *WEB* browser.

Pressing **Save to Mendeley** button, a window opens, where bibliographic data of the publication are provided. If everything is correct, press **Save** and the publication will be automatically added to the *Mendeley* library, and you will be able to add references to it in your paper.

Imported publications can be corrected or opened in the *Mendeley* application at once.

Mendeley provides opportunity to supplement one's *Mendeley* library automatically also in case a document the user wants to add to his/her library is saved in a certain folder.
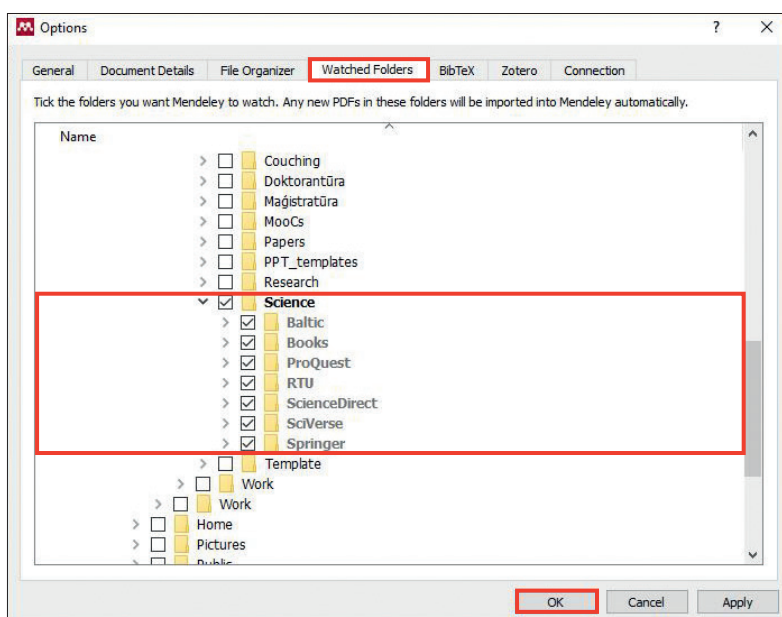

Figure 5.7 Adding sources from folders.

For example, when the user searches for literature sources according to key words in a database subscribed by RTU and saves the found documents in PDF format in his/her computer folder to read them later, *Mendeley* can initiate the function when all PDF files stored in this folder are automatically added to the *Mendeley* library, so that later it is possible to provide references to them and quote. This function is called **Watched Folders**. It can be reached from ***Tools / Options / Watched Folders***, and the folder should be marked to add the saved PDF documents to the *Mendeley* library.

Mendeley provides opportunity to synchronize *Mendeley Desktop* with *Mendeley Web*, for example, when the user wants to access his/her library online from any place having authorized on *Mendeley Web* site. To be able to use the **Sync** function, the synchronization function should be activated. This can be done from **All Documents / Edit Settings**. Mark the **Synchronize attached files** menu checkbox. It is possible to choose all documents of the library to be synchronized or only documents from a specific folder. One has to monitor one's occupied space volume (in GB) not to exceed the volume provided free of charge.
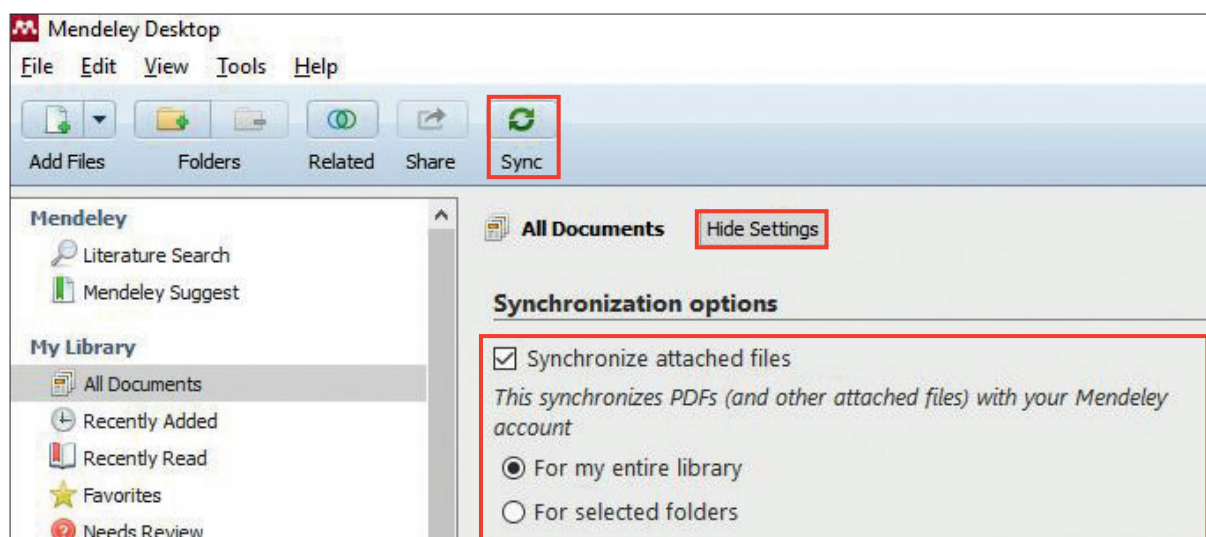

Figure 5.8 Library synchronization.

Having pressed the ***Sync*** button, synchronization between the user's *Mendeley Desktop* and the *Mendeley Web* environments takes place, and, following the authorization in the *Mendeley Web* environment, the user can get access to the PDF documents in his/her library, as well as share them with others.

For additional mobility, it is possible to use the *Mendeley* mobile application, which is available on *iOS* and *Android* platforms. It has limited functionality and is envisaged for editing descriptions of existing sources and adding of new ones.

5.3. Document Management

The *Mendeley* tool provides extensive opportunities for management of documents. Documents can be marked as read or unread. When documents are added to the *Mendeley*

library, they are marked as unread; their user can follow what new entries are attached and what should be read. When a document is open in *Mendeley PDF Viewer*, the document is marked as read.
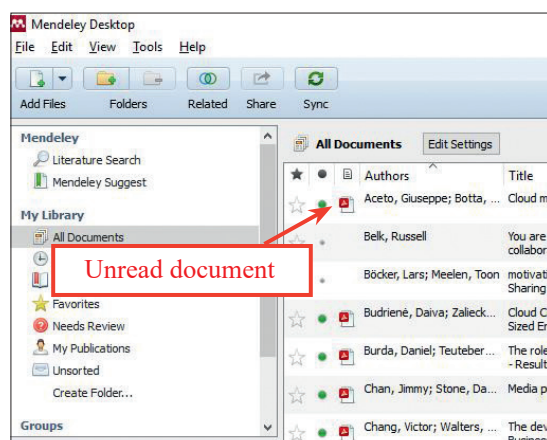

Figure 5.9 Status of a document in the *Mendeley* tool.

A document can be open in *Mendeley PDF Viewer* by clicking on it twice. A tool bar is provided in *Mendeley PDF Viewer*, which allows putting marks in the text, highlighting the text, etc. A search opportunity entering key words is provided in the PDF document.

Mendeley provides opportunity to organize the library documents in different ways by using the **File Organizer** tool – **Tools / Options / File Organizer**. It is possible to copy all documents of the library from a specific folder and create a structure of folders by years, authors, journals, as well as rename each file added to the library according to the selected principle, for example, include the author, year and name in the file's name.
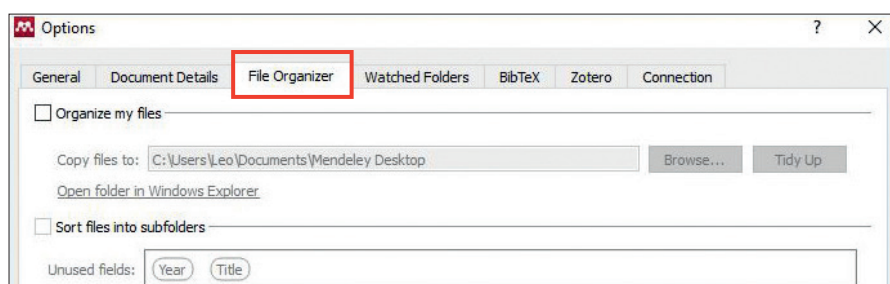

Figure 5.10 Grouping, arranging and renaming the sources.

Mendeley provides opportunity to clean the library from duplicates by choosing **Tools / Check for Duplicates**. It is possible to unite duplicates by pressing **Confirm Merge**, when the documents have no contradictions in the bibliographic data.

5.4. Citation of Documents and Generation of the List of References

When a user has created own library, *Mendeley* provides opportunity to add references to *Mendeley* library documents in the documents created by the user and quote documents in conformity with international standards in *MS Word* and *Open Office* text editors. The list

of references with the used citations is generated automatically, based on the chosen style, significantly reducing the administrative load of a researcher/student in developing their research or graduate paper.

To use this function, the *MS Word* or *Open Office Mendeley* plug-in should be activated. This can be done from the **Tools / Install MS Word Plug In** menu.
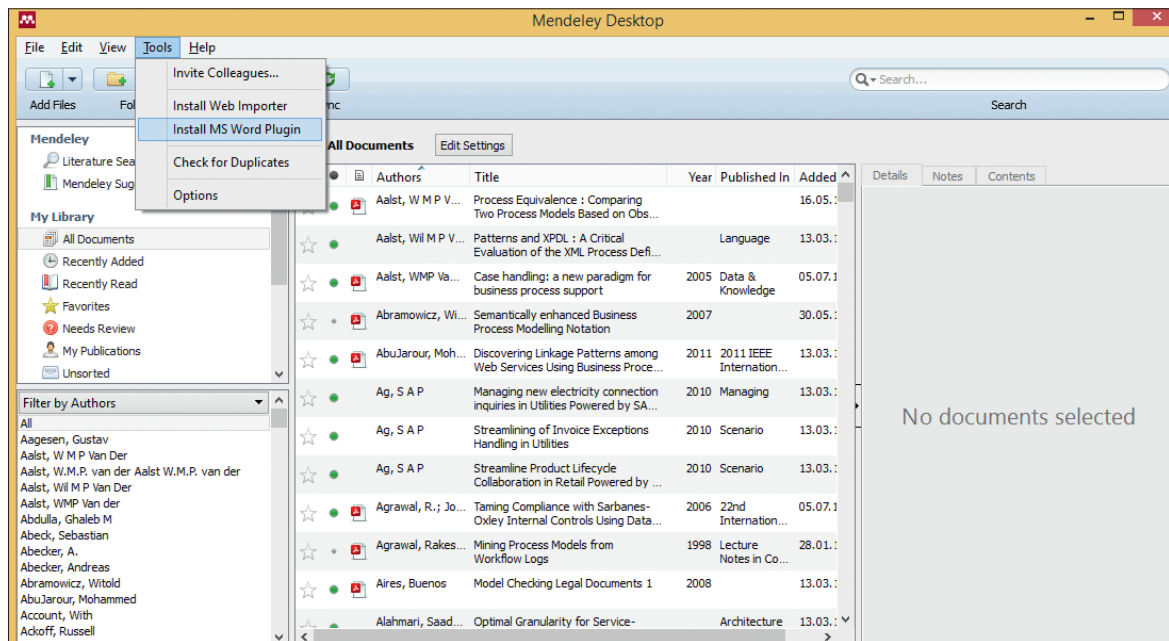

Figure 5.11 Activating *MS Word* plug-in.

When the plug-in is activated, a new group *Mendeley Cite-O-Matic* will appear in the *MS Word References* tab.

First in this section a citation style should be selected in the **Style** field, which is used for formatting citations and the list of references. If the required style is not seen at once, click **More Styles** and find the required.
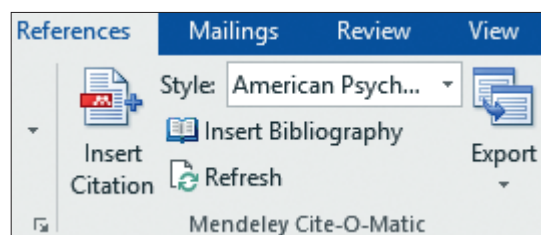

Figure 5.12 *Mendeley Cite-O-Matic* group in the *MS Word Reference* tab.

American Psychological Association 6th Edition (*APA*) is the style that most closely meets the requirements of these Guidelines.

By clicking **Insert Citation**, the *Mendeley* window opens, where it is possible to find a document to be quoted.

Citations can be searched by using any key word: author, name or its part, year, journal, etc.

When selecting the right document among the found ones, press *OK* button and the reference will appear in the text in conformity with the selected standard.
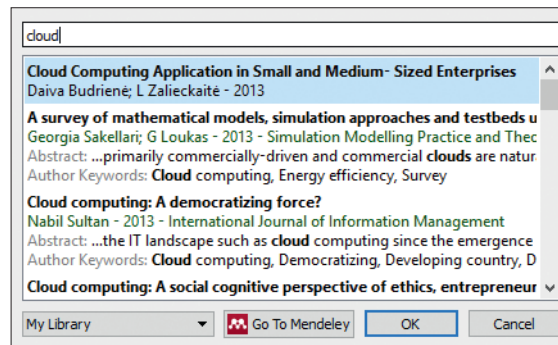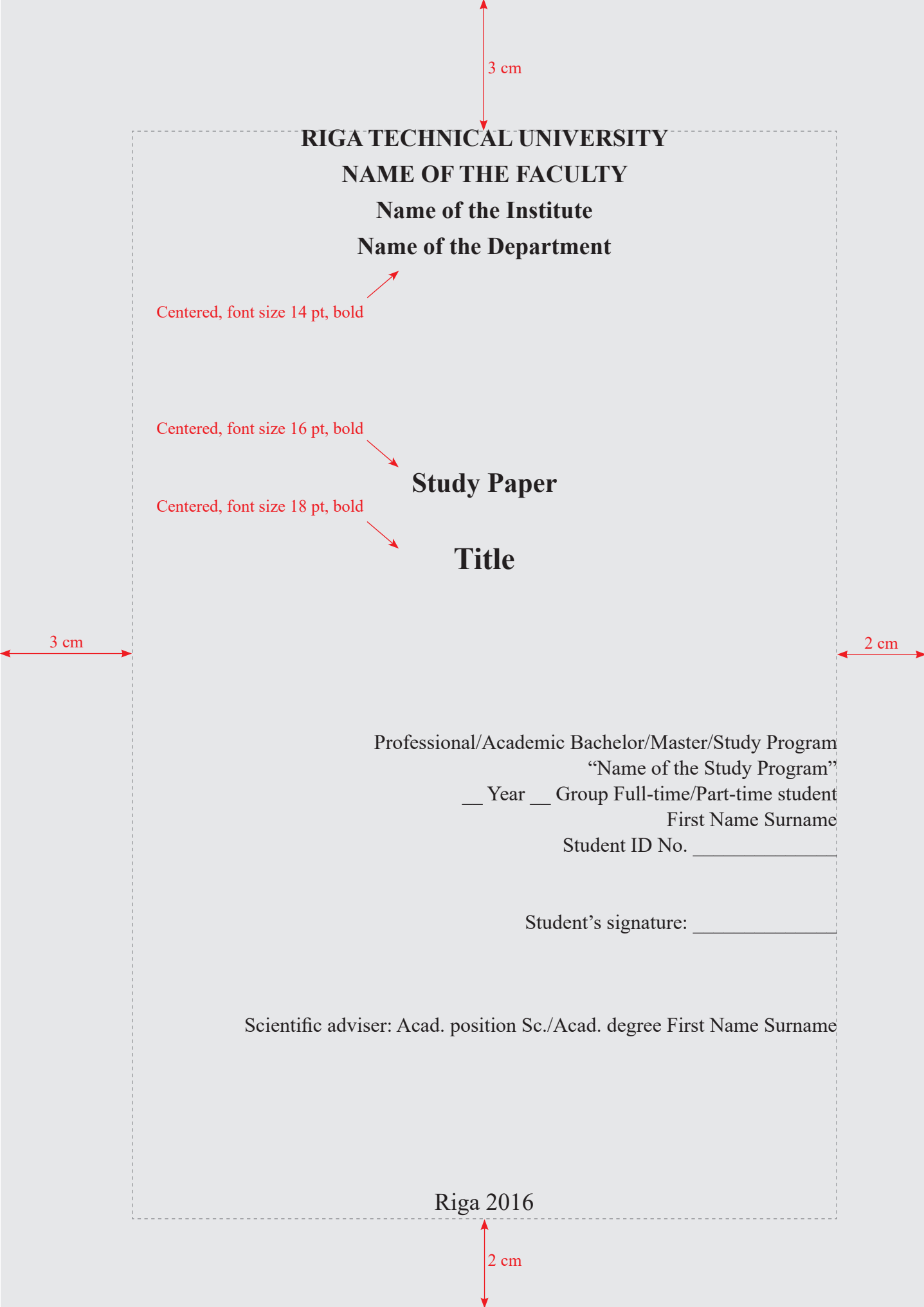

Figure 5.13 Reference search dialog box.

After all citations are placed, the List of References can be created. The list will include only the sources quoted in the paper. The list will be drawn up in accordance with the selected referencing style. To insert the list, click **Insert Bibliography**. The inserted field will be automatically updated including new citations added to the document.

44

Appendixes

Appendices

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RIGA TECHNICAL UNIVERSITY
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Study Paper

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Student's signature: _____

Scientific adviser: Acad. position Sc./Acad. degree First Name Surname

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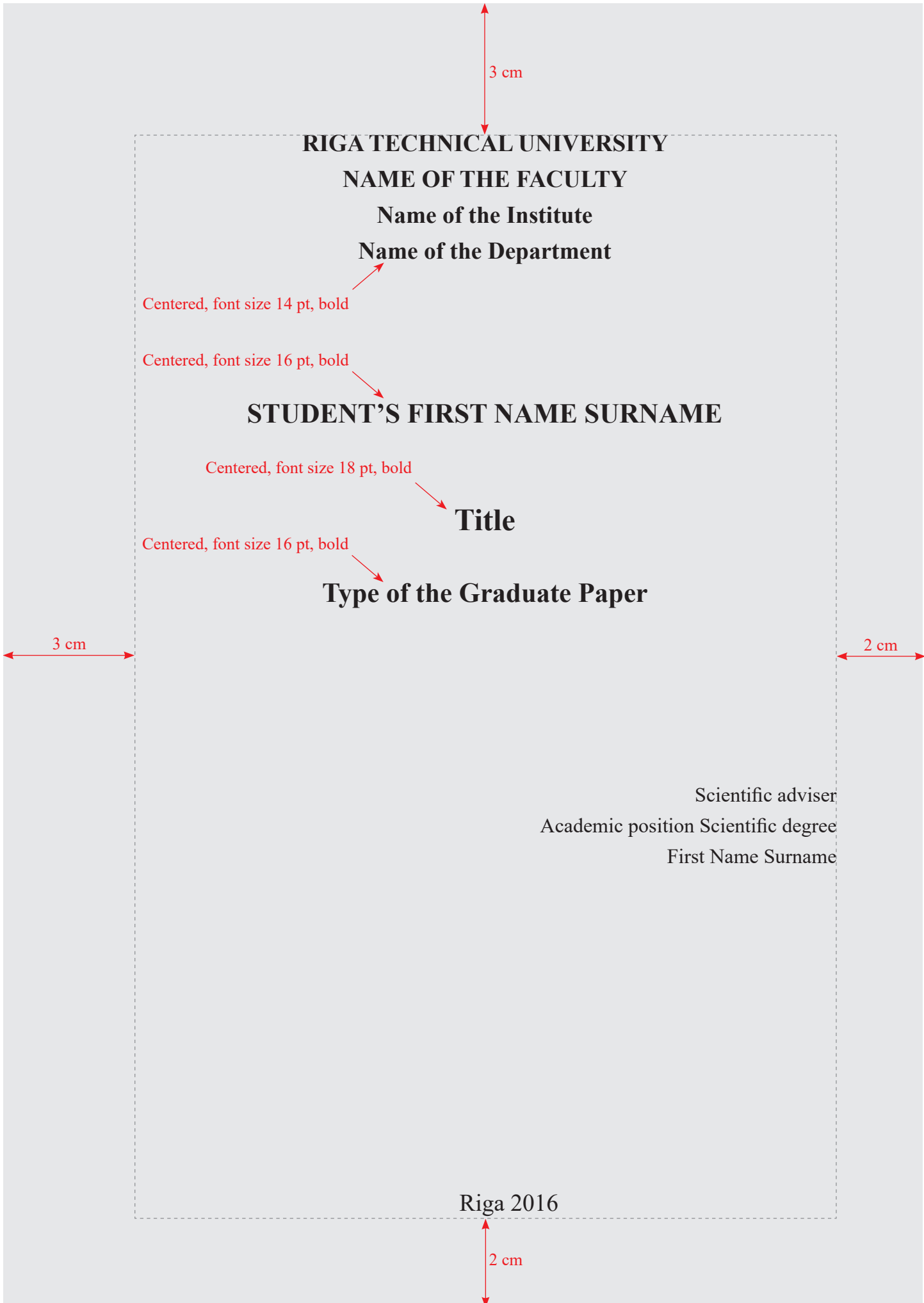
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Table of Contents

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Read also the full version!

Page format A4, vertical

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3rd level chapter: Font size: 12, aligned left, bold

Space

1 ANALYTICAL PART

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1.1 Latvian pension system and its advantages and disadvantages

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1.1.1 Three levels of pension system

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Since July 2001 there is a three pillar pension system in Latvia, it includes the 1st pillar (state compulsory unfunded pension scheme), the 2nd pillar (state funded pension scheme) and the 3rd pillar (private voluntary pension scheme). The underlying principle of the system is: the larger the contributions made today are, the larger the pension will be tomorrow. Simultaneous existence of all the three pension pillars ensures the stability of the system, because it reduces the eventual demographic or financial risk for each of the pillar. (SSIA, 2016)

Reference

Pension capital is calculated by Formula (1.1) (Kozlovskis *et al*. 2015, 289):

Italic

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Comma in the Equation Editor

Equation numbering within 1st level chapter

$$P = \frac{K}{G},$$

(1.1)

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where
P – the annual state pension;
K – the accumulated capital in the 1st and 2nd pension pillar;
G – special coefficient which is recalculated each year according to demographic forecasting.

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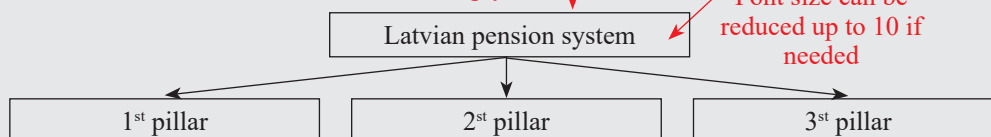Latvian pension system consists of three pillars (see in Figure 1.1):

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Figure numbering within 1st level chapter

Figure 1.1 Three pillars of Latvian pension system (Created by the author).

Caption answers the questions What? Where? When?

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Types of social insurance (SSIA, 2016):

- state pension insurance,
- insurance for the case of unemployment,
- insurance against accidents at work and occupational diseases, etc.

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Return on Latvian pension plans is shown in Table 1.1.

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Table 1.1

Table numbering with 1st level chapter

Caption answers the questions What? Where? When?

Return of Latvian pension funds on 01.03.2017 (Manapensija.lv, 2017)

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Font size can be reduced up to 10 if needed

Plan name	Annual performance, %	
	1y	10y
1	2	3
CBL Active plan	5,86	3,38

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Table 1.1 Continued

1	2	3
DNB Active plan	7,14	4,05
Nordea Active plan	8,30	n/a
NORVIK "Gauja"	11,82	4,08
SEB European plan	7,03	3,32
SEB Active plan	6,26	3,22
NORVIK "Venta"	7,84	3,02
SEB Balanced plan	4,20	3,40

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A person (employee) is socially insured with the insurance of accidents at work, insurance against unemployment, disability insurance, maternity and sickness insurance, and parents' insurance, and the person has to pay mandatory contribution for the said insurance as of the day when the person has acquired the status of an employee.

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