

# DOCUMENTARY RESEARCH METHODOLOGY

## DEFINE THE SUBJECT

In a context of information overload (infobesity) and media diversity, the processes of documentary research and information validation require the application of an effective methodology.

The purpose of a good research methodology is to facilitate the production of academic work that combines documentary richness and scientific rigour.

You need to define your research question: construct hypotheses and statements that will be confirmed or refuted by your research. The research question cannot be constructed without prior knowledge of the subject.

You must therefore carry out a 'literature review', i.e. a state-of-the-art review of what has been written on a given subject, such as a management topic. To do this, it is very useful to know the key resources that provide access to academic articles or the professional press.

The aim of a literature review is to summarise the current state of research related to your research question by grouping the research according to a certain logic, without listing the texts one by one, in order to show at the end why your research is interesting and/or innovative.

Bibliographical references must include books by specialist practitioners or researchers and articles from scientific and professional journals. Under no circumstances should you rely solely on the mainstream press and websites.

The Five W's questioning method (What? Who? Where? When? Why? How?) will enable you to explore all the dimensions that need to be addressed in order to achieve this. It is a mnemonic device for remembering a set of simple questions that will be used to identify, clarify and explore a topic in depth:



- **Who?** ➤ Who are the actors, the people involved?
- **What?** ➤ What aspects of the subject interest me?
- **When?** ➤ What period does my subject cover?
- **Where?** ➤ Is the subject limited to a specific geographical area?
- **Why?** ➤ What are the issues at stake?  
How important is the subject in the current context ?
- **How?** ➤ What approaches or points of view should be considered?  
What scope should be given to it: historical, sociological, economic, political,...?

## DEFINE THE APPROPRIATE KEYWORDS

The subject should be expressed in a short sentence, if possible in the form of a question and using meaningful terms. This search statement should be as precise as possible.

Each term in the statement is important and will correspond to concepts/keywords that will be used to develop the search equations.

For each concept, it is advisable to look up one or more synonyms or related terms, as well as their translation into English (or other languages depending on your subject).

Think in advance about the terms to use when searching the various resources, based on the different concepts you have identified. Do not stop at the first keyword that comes to mind, but try to identify synonyms, more generic terms or, conversely, more specific terms.

## DEFINE THE TYPE OF INFORMATION TO BE FOUND

After analysing and defining the subject, you need to choose the best sources of information for your documentary research.

This process has two dimensions:

- the type of documents you are looking for: books, journal articles, theses, statistical data, legal data, market studies, financial information, etc.
- the type of resources to consult, which will depend on the nature of the subject and the type of document you are looking for: library catalogues, databases, web search engines, specialised portals, etc.



## FIND THE APPROPRIATE RESOURCES

Based on what you defined in the previous step, you will identify the resources that are best suited to your needs. For your literature review, you will target books, of course, but also academic (research) and professional articles.

The type of documents depends on the level and nature of the information sought:

- Dictionaries and encyclopaedias are useful for understanding and clarifying the subject, especially when dealing with new concepts.
- Books or monographs are useful for furthering your research.
- General or specialised journals allow you to keep up to date with the latest research findings or current events on a social issue.
- Theses, dissertations and research reports of a high scientific standard are appropriate for dealing with a specific subject.

When conducting documentary research, there are two important concepts to remember. They indicate that a query has failed and needs to be reworded or refined.

- **Noise** ➤ A set of irrelevant documents found in response to a question during an information search. The relevant information is buried in the mass of irrelevant results.
- **Silence** ➤ All relevant documents not displayed during a documentary search. The relevant information is not found and the searcher may think that it does not exist.

**Boolean operators** are used to link ideas/concepts/keywords used in a search in order to find the most relevant results possible. By establishing a logical connection between search terms or keywords, they enable you to find information or a document.

- **AND** ➤ to keep all documents that contain the keywords. Each document **must contain** both search terms. Generally, the AND operator is given priority by databases. In web search engines, a space between the two search terms is equivalent to the AND operator.
  - Consequence: reduces the number of results.
- **OR** ➤ to keep all documents that **contain at least** one of the keywords
  - Consequence: increases the number of results.
- **NOT** ➤ to **exclude** documents that deal with topics you are not interested in.
  - Consequence: reduces the number of results.



## ➤ Optimise searches with Google

Search for an expression in the exact order	Quotation marks «...»	« mass market »
Exclude a word from the search	The sign —	second-hand — video game market
Search for expressions with missing words (limited to 5 words)	Truncation *	business * transformation
Limit the search to the specified site	your keywords + site: ...	Solidarity site:gouv.fr
Find documents in a file format (xls, pdf, ppt, etc.)	your keywords + filetype: ...	Auchan filetype:pdf

## EVALUATING RESULTS

You should always ask yourself whether the documents you obtain are valid from two perspectives:

### ➤ Their reliability

What is their value?

Is the author legitimate and recognised?

What is their objective: informative, commercial, promotional, advertising, controversial, defamatory, manipulative, etc.?

### ➤ Their relevance

Even if a document is reliable and of high quality, is it of interest to you?

Does it fit in with what you want to demonstrate?

To get a quick idea, you can look at: the title, the summary, the keywords, the introduction and conclusion, the table of contents and the section titles.

### ➤ The objectivity of the information

- The more scientific the author's approach, the more objective the content will be. The information should also be compared with other sources on the same subject.

### ➤ The date of the document



## EXPLOITING THE RESULTS

As you conduct your research, you will collect a sometimes substantial number of documents. Be sure to capitalise on them as you go along so that you don't get buried under a mass of information that you won't be able to use!

Give explicit file names to the documents, articles or other items you download, and organise them into folders on your computer, for example by theme.

It is also a good idea to compile these documents in an Excel file, noting the document references (title, source, date, name of the downloaded file, relevance).

This approach will ultimately save you time when using your sources, but also when formatting your bibliography!

## CITING YOUR SOURCES!

Failing to cite your sources (whether they come from the internet, paper documents or other sources) constitutes plagiarism. This is a fundamental moral and ethical rule that applies to all researchers, specialists and, even more so, students. Consequently, you must ensure that you cite all your sources, in other words, all the material you have borrowed.

The professors at our two schools reserve the right to submit students' work to plagiarism detection software, which will compare it to documents available on the internet, whether freely accessible or not, as well as to other student work and resources in the Library.

Any work, regardless of its nature, found to be plagiarised will be given a mark of 0/20. Any repeat offence of plagiarism will result in the author(s) being brought before the disciplinary board.

Any document cited in the text must appear in the bibliography and, conversely, any document cited in the bibliography must appear in the body of the text. The importance of the bibliography cannot be overlooked, as the research work required of the candidate requires them to be well-informed on the subject in order to familiarise themselves with existing work and refine their critical thinking.

Zotero is a free, open-source bibliography management tool. It allows you to collect, organise, cite and share research. It automates citations and generates bibliographies in the style of your choice.

Zotero is compatible with the following browsers: Firefox, Google Chrome, Safari et Opera.

It can be downloaded from ➤ <http://www.zotero.org>

You will then need to download a 'connector' to link your browser to Zotero. By default, Zotero offers the connector that is suitable for your browser.

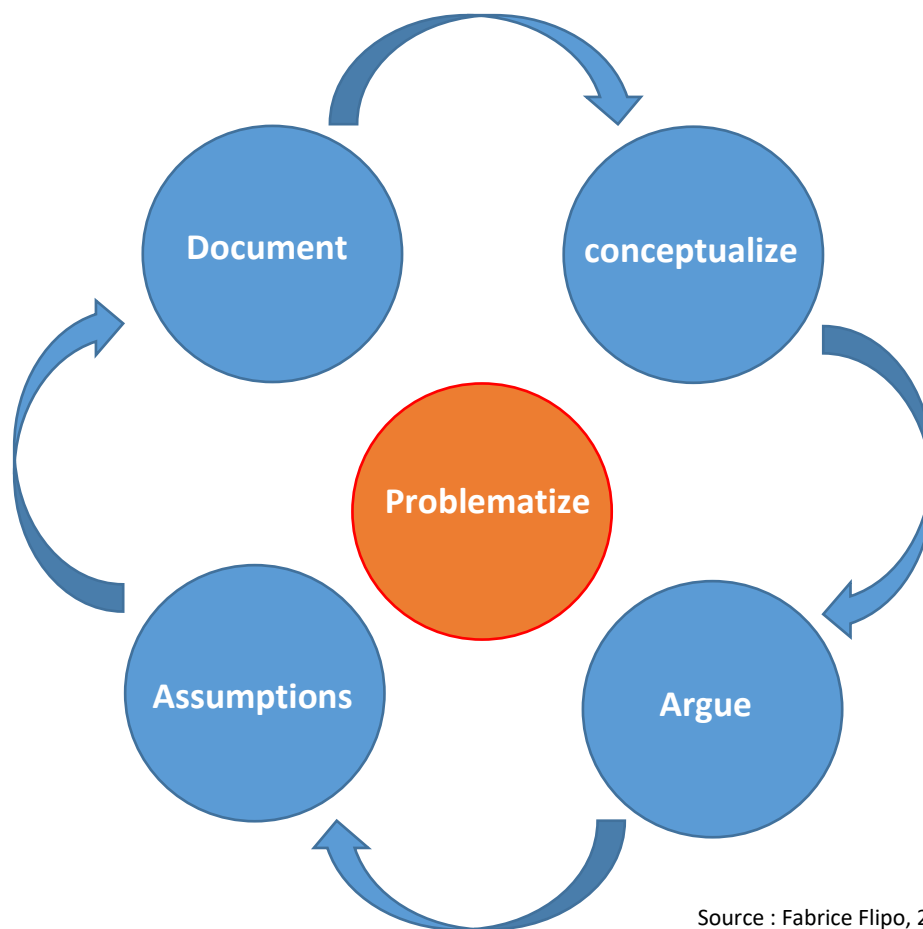
## PRESENTING INFORMATION

This involves writing your thesis or dissertation, which you will organise according to a coherent plan. During your presentation, you will refer to the bibliographical references you have selected, and you must remember to cite them. This is also where you will compile the bibliography that you will present at the end of your work (we will come back to these last two points).

Of course, this presentation is schematic: it is possible to go back and forth between these stages. For example, it often happens that, depending on the documents found, you expand your list of keywords or even adapt the subject of your thesis or dissertation.



## Diagram: « Problematize and argue » (Fabrice Flipo)



Source : Fabrice Flipo, 2023, « Savoir problématiser »

**Problematize:** realizing that objectives, missions, concepts, expressions, institutions, etc. are not as clear and obvious as they seem. From there, knowing how to organize questioning and reasoning, which leads to questioning the concepts used (**conceptualize**), the knowledge and information available (**document**), and the logic on which one relies (**argue**).

However, you still need to determine in which direction you are going to conceptualize or document. A common way to formalize the options you choose is called making **assumptions**.

