

PAPER FORMATTING & DOCUMENTATION GUIDELINES

This guide is intended for use by students in the Eric Sprott School of Business of Carleton University in Ottawa, Canada. It provides summary guidelines for (a) formatting and (b) documenting papers or reports written for educational, business, and other purposes (e.g., term papers or research reports submitted in a class, extended essays or theses in graduate programs, business reports, articles submitted for publication, etc.).

I initially wrote this guide as a teaching aid for my students, and so it reflects some of my own preferences and may not conform to the major manuals of style (such as APA or Chicago), university anti-plagiarism guidelines, your professor's or manager's preferences, etc. Therefore, if you are to use this guide for work submitted to someone else, make sure he/she agrees with this content. Further, the guide covers basic questions that I am frequently asked and is not intended to be exhaustive. You should investigate points you feel are unclear or missing (also please tell *me* about errors etc., so I can improve this guide).

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A. FORMATTING

The papers and reports that are of interest here are supposed to be fact-finding, thought-provoking, in-depth analyses of topics which, ideally, should be interesting to both writer and reader. While the content is, of course, more important, paying attention to formatting does not mean "putting form over substance". Good formatting makes it easier for the reader to understand and follow the content, identify sub-parts that are worth re-reading, assess the writer's understanding of the subject, and so on. Simply, form makes substance more effective. Below are some basic rules for effective formatting (I use student papers as the base example, but the content readily applies to all kinds of reports).

1. Papers/reports of some length (normally over 2-3 pp.) should have:
 - A cover page, showing the title of the assignment and project, the course number and title, your/your team's names, the instructor's name and title, and the date. Lengthy reports (e.g., more than 40pp) may have both an outside cover (some times on thicker paper) and an "inside title page". Note that "Term Paper" alone won't do as an assignment "title" – remember that your instructor is typically dealing with many submissions and needs to be able to tell easily which-is-which – so, specify *your* title (e.g., Term Paper – "The Canadian Lumber Industry"). If team member names are included on the outside cover or inside title page, they must be listed alphabetically unless you want to imply differential levels of contribution. Ensure that all names are spelled correctly and use appropriate titles – e.g., not Mr. or Ms. for a Dr. or vice versa; if you're not sure whether your instructor has a doctoral degree or not, "Professor" is the safest way to go.
 - A table of contents (may be skipped for shorter papers), with page numbers for the sections cited.
 - Where appropriate, an abstract and/or introduction.
 - The content itself.
 - A References list. This lists only the *sources used*, and is generally preferable to a *Bibliography* which may include works not expressly cited (and/or which may be "padded" with works not used).
 - Its pages numbered.
2. Use illustrative materials such as Tables, Figures, Exhibits, and Appendices judiciously.
 - The first three of these should be part of the main text and should appear as close to the point where they are first mentioned, as their size permits. Appendices are placed at the end. Each of the four types should be separately and consecutively numbered in the order it appears.

- Don't push important content to Appendices just to save space if the main text has a page limit (you don't want to force your reader to be going back and forth to find important material).
- Conversely, don't "pad" your paper by including inconsequential details. For instance, don't include a 10-page Statistics Canada table as an Appendix if you're only using one number from each page – summarize your ten numbers into one Table made by you instead. Likewise, avoid the tendency to just "dump" endless reams of material downloaded from the Web into Appendices – discuss it if it's relevant, don't use it if it's not. It takes work to make a reader-friendly document.
- Do use modern technology to make your paper more interesting and effective – e.g., enrich it using charts and graphs, bullets and/or numbering, highlights, and so on, available through graphics, spreadsheet, or word processing software, and/or from the Web.
- Conversely, don't over-format, with such things as little hands with pointing fingers and smileys (you're writing a professional document, not an ad or love letter) or by rendering subheads in bold, underlined, and italics all at the same time – one formatting type will do (see #4 below).

3. If there are page limits for the assignment, respect them. You can play *a bit* with margins, fonts, line spacing, etc., to make a slightly longer piece fit, but don't overdo it.

4. Organize your paper well by using appropriate levels of headings. You may prefer to number the headings, or not. Whichever the case, here's a sample format (assuming a single-spaced paper):

1st level heading: Centred, all-caps, bold, two spaces before and one after

2nd level: Flush-left, first letter of main words capitalized ("Title" format), bold, two spaces before and one after

3rd level: Flush-left, lower case except first word ("Sentence" format), italics, one extra space before – none after (i.e., next paragraph of text begins right under this subhead)

4th level (but think: must you use this many?!): Same as above, only you put a period at the end of the subhead title and then continue on the same line with the text.

* This is just a sample. You may choose to skip or adjust any level. What matters is to be *consistent* in the system you use, and to design it in such a way that it is *logical* and *easy for the reader* to follow.

5. If you use acronyms (e.g., FDI for "foreign direct investment" or BNS for "Bank of Nova Scotia"), define them the first time you mention them, and then use them and only them throughout. That is, if you've defined "FDI" on page 3, don't say "foreign direct investment" on page 5. If you must mention "FDI" ten times in one paragraph and it looks overdone, then, rather than returning to the full phrase, use some variant instead (e.g., "foreign investment", "investment", "foreign capital", etc.).

6. When you refer to numbers, spell out those below 10 (e.g., "six", not "6") and use numerals for 10 and up. There are many technical rules on this, but a general exception is references to statistical findings where the numeric form *can* be used for all numbers; for instance, you might say that "at least two American and 12 Canadian authors [per the base rule] say that 3 per cent of males and 6 per cent of females [reporting of statistics] wash their hands before dinner".

7. Spell-check your paper before submission. Then double- and triple-check it visually as well. Spellcheckers don't know the difference between "fox" and "folks", "their" and "there", or "it's" and "its".

8. If you're not confident about your own know-how in spelling, grammar, or syntax, ask a friend who knows more to edit your work. Few things irritate readers more than poorly written papers.

9. Lastly, write your paper in as professional a manner as you know how. For instance, do not use colloquialisms such as "it's" instead of "it is" (I do use these here, but only because I want to stress the informality of this guide), expressions like "right off the bat", needless repetition, common errors ("it's" instead of "its" – or, heaven forbid, "could of" instead of "could have" or "could've"), and so on.

B. DOCUMENTATION

Since papers, reports, and other similar works often draw from or are based on previous research conducted or ideas expressed by others, it is crucial that credit be given to them whenever their work is used. This is different from journalistic reporting, business writing, or early school-style essay exercises, where some exceptions are permissible but also, regrettably, where much abuse occurs. The main reasons why proper documentation is important, especially in academic writing, include:

- Citing the references used allows the reader to refer to the author's sources, if he/she wants to further research the topic.
- Knowing the writer's sources allows readers to judge the importance of the points made. (An idea or piece of information in psychology would *normally* carry more weight if it was originally expressed by Sigmund Freud instead of an obscure reporter in an obscure newspaper article.)
- Full documentation allows you to demonstrate your fact-finding efforts and the amount of knowledge you have acquired and used in the work. Don't take this lightly to imply "showing-off". The worth of your learning, and of the output from it, can be determined by many factors including the extent to which your work is supported by appropriate existing knowledge, your apparent effort in researching relevant facts, your degree of familiarity with previous relevant works, and so on; proper citations demonstrate all of the above.
- Last but not most certainly not least, and to mention the obvious, to present someone else's ideas as one's own (i.e., to plagiarize) is not only illegal but outright unethical and is dealt with accordingly, in either university or other professional environments.

Against the above background, this part of the guide outlines the different forms of "giving credit where it's due" in paper or report writing. Recall that this is just a summary and it reflects my own preferences. Full details on various citation systems can be found in the APA (American Psychological Association), Chicago, ASAC (Administrative Sciences Association of Canada), Turabian, and other Manuals of Style. Different instructors require different formats, but many leave the choice to the writer *so long as the one chosen is used consistently* (i.e., don't mix APA and Turabian in the same paper). Make sure you know what your instructor expects before using this guide.

1. General Citation Approaches for the Works of Others

Although there are many different documentation formats, all going into such detail as whether to put a comma, semi colon, or period after the title of an article and before its source, *what is important is giving appropriate credit no matter which form is used*. Generally, there are two ways for doing this:

1.1. Provide the author's name and the year in which the work was written right where you make reference to the work in your text. For example, following a discussion on a theory concept, you may write: "That's what this theory said (Smith 1968)". Or, if the author's name forms part of what you want to say: "According to Smith's (1968) theory...". Then, all the authors you have used throughout your paper must be presented at the end alphabetically in a list of References, where readers can find the full details of all the works used. This approach dominates in business writing today.

1.2. Provide a full "note" about your source, either at the bottom of the page where the source was used (footnote), or by placing all notes at the end of the paper (endnote). This approach is rarely used in business writing any more. Instead, foot/endnotes are used only to elaborate on a point, if the author considers that the elaboration is not important enough to be included in the main text (or might even detract from it). Generally, even explanatory notes should be avoided (ask yourself: if this is not important enough to be part of the main text, should it be included at all?).

The next few sections provide detailed examples of various citation formats for illustration purposes, using the first of the above formats. A brief section later on will show you how the second format works, in case you must use it for some reason.

2. What, and How Exactly, to Cite?

What: Though there is no rule without exceptions, the safest general rule is that anything that is not your own idea, opinion, etc., must be referenced. Otherwise you may be committing plagiarism.

How: As an example of how to reference a source, let's use phrases from a book by David Head, titled *Made in Germany: The Corporate Identity of a Nation* and published in 1992 by Hodder & Stoughton in London, UK.

2.1. If you want to make a direct quotation of the following phrase (i.e., use it verbatim), then:

a. In the text you write:

"In both cases the message was unlikely to be lost on a people which had learnt from bitter experience" (Head 1992, p. 74).

or, if you want to use Head's statement as part of a phrase you are writing,

According to Head (1992, p. 74), "In both cases the message was unlikely to be lost on a people which had learnt from bitter experience" – and the evidence he cites suggests that he was right.

or, if you want to make a direct quotation of only part of Head's words, and omit some words to make it shorter, then substitute "..." for the part you want to omit. For instance,

According to Head (1992, p. 74) "... the message was unlikely to be lost..." – and the evidence he cites suggests that he was right.

b. In the References list at the end of the paper, for any of the above you write:

Head, David (1992), *Made in Germany: The Corporate Identity of a Nation* (London, UK: Hodder & Stoughton)

- Notice that although this looks, and is, simple, it has several interesting points which, if not followed, will lead to confusion. For example: (i) you start with the last name so the reader can quickly find, in the References list, the source mentioned in the text; (ii) you cite the year right at the start, so that if there are several works by Head, in various years, the reader can again find the source quickly; (iii) you highlight (italics, underline, or bold) the book's title to distinguish it from the rest of the citation; and (iv) you mention not only the publisher's name but also the city and country of publication (there can be two or more publishers with the same name; the same publisher may have operations in several cities/countries; and there are many "London"s).

2.2. If you want to make a direct quotation of the following phrase, which is in Head's book but was originally written by another author whom Head cites, then:

a. In the text you write:

"When individuals vote with their pocket-books ... they leave behind the rhetoric" (Ohmae, in Head 1992, p. 74).

- Notice that here you are citing both "who said it" (it would be wrong to attribute Ohmae's ideas to Head) and "where you found the statement" (you didn't read Ohmae's work yourself). You do this mainly for honesty's sake but also to protect yourself. Avoid the temptation of citing Ohmae directly just to increase your References list by one. You never know whether Head quoted Ohmae correctly, out-of-context, or whatever, and whether or not your instructor may have read

Ohmae's original work and knows better. Of course, if you can access Ohmae's book and verify the accuracy of the quote, you could cite Ohmae directly.

b. In the References you write:

Ohmae, Keinichi, *The Borderless World*, as quoted in Head, David (1992), *Made in Germany: The Corporate Identity of a Nation* (London, UK: Hodder & Stoughton)

- In this case Head was using a different citation system from the one here and did not supply the year of publication of Ohmae's original work. Had he done so, then:

- in the text you would write (Ohmae 1989, p. 3) – i.e., no reference to Head needed here;
- in the References you would write the same citation as above except for adding the year, i.e., Ohmae, Keinichi (1989), *The Borderless...*, as quoted in Head, David ...

2.3. Instead of a direct quotation of the phrase in 2.1. above, you may want to use Head's ideas but in your own words, perhaps added to a broader concept you want to discuss. In this case,

a. In the text you write, without quotation marks:

Past experiences of the target consumers can make it more likely that they will notice messages of this kind, and Head (1992, p. 74) makes this case forcefully.

- Note: The page number of the original must be provided for direct quotations of three words or more, but may be provided, or not, if you're referring to someone's work but in your own words.

b. The References entry will be the same as in 2.1.

3. How to Cite Different Kinds of Sources

In the above example we were referring to a book. However, in your work you will often need to cite information found in many different kinds of sources. Examples are chapters in an edited book, articles published in journals, magazines, newspapers, conference proceedings, etc., interviews that you conducted as part of your research, things said on TV or radio programs, information culled from the Internet, and so on. Here's a quick guide on how to cite each source.

3.1. In the text, you use the same approach as above – that is, provide the author and year – no matter what the source. We'll deal later with sources that don't have an identified author.

3.2. In the References:

a. If the work you cite is a book that was written by an author, see the examples using Head, above.

b. If it's an "edited" book, i.e. a compendium or anthology with chapters written by various authors but which have been put together and supervised by someone else (who may also have also written one or more of the book's chapters), then you need to identify the "author" as being in fact an "editor":

Reggaj, Michael, ed. (2015), *The Sociology of Rock-and-Roll* (Ottawa, ON: RF Publishers)

c. If you want to refer *not* to the whole edited book, as in (b) above, but to a chapter in it, then:

Keith, Robert (2015), "Contemporary Dimensions of Hard Rock", in Michael Reggaj, ed., *The Sociology of Rock-and-Roll* (Ottawa, ON: RF Publishers), pp. 56-85

d. If it's an article published in the proceedings of a conference (like an "edited book", proceedings contain articles equivalent to "chapters" and normally have an editor), then:

deBracci, Elizabeth (2004), "Explaining the Concept of Marketing", in D. Katchikian, ed., *Proceedings of the Academy of Marketing Science* (Vancouver, BC, June), pp. 19-28.

e. If the work is an article published in a journal:

Kotler, Philip and Sidney J. Levy (1969), "Broadening The Concept of Marketing", *Journal of Marketing*, vol. 33, no. 1 (January), pp. 10-15.

f. If it's a magazine or newspaper article:

Keith, Robert (2007), "Music trends in the new century", *Expressions* (September 14), pp. 7-9.

* Notice, in all of the above, that for a book you highlight the book's title, which also is the title of the work itself; however, for chapters in edited volumes, and for articles in journals etc., you highlight the title of the source publication instead and put the title of the work in quotation marks. Also, while the publication year is usually enough for a book, for most other sources it's necessary to give more information, such as volume and issue number and/or date; that's obviously because there's one book but many issues of periodicals – and so you need to tell the reader in which issue the article is.

g. If it's an interview you have conducted:

Carruthers, Catherine (2002), Vice-President International Marketing, Nimbus Ltd., *Interview* (Ottawa, February 6)

- Here you italicize the source type, as always, but also provide details about the interviewee and the date and location of the interview.

h. If it's information from a broadcast on radio or TV:

"Looking ahead to 2020" (2016), *program on XYZ TV* (January 22)

- Or, if it was not a free-standing program but part of a regular broadcast:

"Looking ahead to 2020" (2016), *XYZ TV news broadcast "The Daily"* (January 22)

i. If it's information from the Web:

Embassy of Spain (2012), "Facts and Figures on the Spanish Economy", www.embassy/..., Ottawa, January 22; accessed February 7, 2013

- Watch that here you would provide the date of posting/publication (hoping it was given by the information provider) as well as the date when you found the information; among other reasons, that's done to protect yourself – by the time someone reads your work, the url may have been removed. Also note that you must give an origin location, if relevant – in this case "Ottawa" (otherwise, which of the many Spanish embassies worldwide posted the information?)

4. **Quirky Situations and More Esoteric "Trivia"** (but remember: **While trivia perfection do not make, perfection is not trivial**)

There's no citation system that can address all eventualities that you may run into. But below you will find some pointers on how to resolve some fairly common and some rather uncommon situations.

4.1. No matter how uncommon the source, no matter what information may be missing for a full and proper citation, no matter what other problem there may be in your efforts to reference a source, remember this simple rule: just cite the source in a way that the reader can (a) assess its value and (b) find it if he/she wants. Any information you give will be better than nothing.

So, for example, if for some reason you must cite a map of Africa which you used, but can't recall its exact title, the publisher, or the year, and you don't have time to go back to the library to check, then:

- in the text, write your sentence and then: (Africa 2004)

- in the References: Africa (2004), map in *Carleton University Library*, 5th floor.

4.2. Some times you need to refer to someone's work again and again, in the same section of your work. Technically you must mention the author's name and the year each time, but this can get booooring for you and your readers. To resolve the conundrum, use one of these formats:

- a. Mention the name and year the first time, and then use antonyms ("he/she/they also state[s] that...") or synonyms ("this researcher, the author, the writer also states that...")
- b. Mention the name and year at the beginning of the relevant paragraph, and then use appropriate wording to indicate that the rest of it comes from the same source ("Haworth (2002) makes several interesting points. One is that... Another that...").
- c. Do the reverse – present the source's ideas and state the name and year at the end ("It has been argued that ..., that ..., and lastly that ... (Haworth 2002)")
- d. If it's a lengthy section in which you elaborate on a source's ideas, begin by stating exactly that – i.e., "This section discusses the concept of marketing exchanges as presented by Bagozzi (2012)". Or, "The following discussion is based on Bagozzi (2012)".
- e. In the same case as above, but where you also want to interject the ideas of others who agree, disagree, or otherwise have commented on the main source, begin by stating that "In discussing the concept of marketing exchanges, this section draws mainly from Bagozzi (2012) unless otherwise noted" (then don't forget to "otherwise note" the other sources!).
- f. An alternative way for handling the situations in (d) and (e) above is to put a footnote/endnote mark right at the title of the relevant section, or at the beginning of its first paragraph, and write your explanatory statement, as above, in the foot/endnote instead of in the main text.

4.3. When a certain idea is shared by two or more authors, in the text you would normally write something like, "Many authors believe...", or, "It is a widely held belief...", and then follow with:

(for example, see Kotler 2005; Levy 2007; Bagozzi 2012; Hunt 2014).

or, more simply, with:

(Kotler 2005; Levy 2007; Bagozzi 2012; Hunt 2014).

- Note that when you use reference "strings" like these, depending on the situation and the referencing system you use, you should present the various authors either in alphabetical order or, more commonly, in chronological order, as in this example – just don't list them randomly.

4.4. So far, we've been using single-authored works. What do you do if the article you're quoting was written by two or more authors?

In the text:

- mention all names for up to three authors: (Kotler, Levy, and Bagozzi 2002)

- use "et al." for four or more names, that is, for an article by Kotler, Levy, Gaetz, and Lund, write: (Kotler et al. 2003)

(Watch: "et al.", not et. al, et. al., or et al – "et" is a full word meaning "and" (and so, no period needed), whereas "al." is an abbreviation of "altri", meaning "others" (and so needs a period).

In the References:

- include all the names, no matter how many

- begin with the first author as in the earlier examples, i.e. last-name-first, but then cite all other authors first-name-first; e.g., Kotler, Philip, S.J. Levy, and R. Bagozzi (2003) "(title etc.)"

4.5. What if there are more than one works by the same author in the same year?

In both the text and the References list,

- distinguish between years by writing (Kotler 2004a), (Kotler 2004b), and so on.

4.6. And what if there is no author? This is quite a common situation with magazine or newspaper articles, broadcasts, Web information, etc. You have to improvise here, to an extent, but there are some basic rules:

- First and most important, remember the basic rule: (i) the main intent in mentioning the source in the text is to enable the reader to judge the value of what is said; (ii) the main intent in giving a full citation in the References is to enable the reader to find the source if he/she wants.
- Given the intent, how can you improvise? Well, first check the source – and then:
 - ◊ since no author is cited, might there be a *publisher* who is equivalent to author? Such would be the case of the Web page of the Embassy of Spain, above, in which case in the text you'd write (Embassy of Spain 2012), and in the References the citation given above in 3.2.i.
 - ◊ might it be more appropriate to use the source's *title* instead? For instance, in the text you'd write (Facts and Figures on the Spanish Economy 2012), and in the References you'd move the citation elements around by saying "Facts and Figures on the Spanish Economy" (2012), <http://www.embassy/...>, Ottawa, *Embassy of Spain*, etc.
 - ◊ in the above case, it is in fact more common to abbreviate the title citation if it's too long, that is, in the text you'd write ("Facts and Figures..." 2012), while in the References list you'd of course still give the full title.

5. Building the References List

In the References list itself, you are expected to list all the sources you used in your paper, in alphabetical order. Format the entire list with a hanging indent for each source, or a tab at the beginning of each, or a double space between every two sources, so it's easier for readers to find a name they may be looking for. In some instances, authors like to group their sources by type. This would be done, for example, if you have used an unusually large number of unusual sources (say, 15 interviews), in which case you might consider listing them separately under an "Interviews" subhead within the References list.

6. What Else About Documentation?

Obviously, as I noted several times this brief note cannot cover all the cases you may face. If you run into a situation that has not been covered here, then, as I also noted, just use your imagination while keeping the objectives of proper referencing in mind. And what, you may ask, would you do if even your imagination doesn't seem to help much? Then just take any modern textbook or journal and leaf through its list of references – you will certainly find some referencing format that is good for your purpose! Failing that, go to the library and check one of the Manuals of Style mentioned above, or contact your instructor. (But watch – if you do the latter, and unless you've run into the \$64,000 Situation, and since it's not fair to ask your busy instructor to do your work, do expect him/her to ask why and how both your imagination *and* this superb guide failed to find the answer!).

7. And, What About Your Own Knowledge and Opinions?

Many students have expressed concern that, after referencing everything, there's not much left to be claimed as their own input in a paper. Well, on the one hand it's natural to rely more on others' works at this stage (unless your last name spells E-i-n-s-t-e-i-n, or you're writing a Ph.D. thesis, a paper for publication in a peer-reviewed venue, or some such, hardly anybody expects you to come up with original cutting-edge ideas). On the other hand, you don't need to under-value your contribution:

- Your job, more often than not, is to put together pieces of information and knowledge in order to show that you understand the topic you are dealing with, to add your comments, elaborate, compare etc., to/on/about the information you have obtained, and, if you're writing a thesis, to take a position on an issue (that's what "thesis" means) based on the results of your own research (in which case, once you've completed the "Literature Review", you'll have no shortage of your own material to write).

- As well, there is information that need not be referenced because it's common knowledge either generally or among people with an education at least similar to yours.

- Lastly, there are comments you can make which are supported via deductive reasoning, by reference to other sources you have used.

Let's look at some typical situations.

7.1. General Knowledge: You do not need to cite sources for statements that refer to well known facts, such as "World War II claimed many lives" or "It usually snows in winter". The same goes for statements that may not be widely known but can be assumed to be known by your intended audience – such as saying that "the product life cycle has four stages" in a marketing paper. However, make sure you can distinguish between well known facts and biased or otherwise unsubstantiated opinions. If your family prefers Coke over Pepsi, you cannot state as a "well known fact" that "it is widely believed that Coke is better than Pepsi". And if you say "the *most risky* stage of the product life cycle is Growth", you'd better cite evidence to support the statement.

7.2. Deductive reasoning: If you want to say that "most authors agree on X", then you have to support this view, probably by referring to something said by a credible source(s). But if you have already proven that only six authors have written about X, and you have also stated what each of the six says, and it's clear that five of the six say essentially the same thing, then the above statement doesn't need further support – it reasonably follows.

7.3. Your own opinions: Try to support them with arguments. Don't just say "TV advertising is bad for young viewers" – how do you know? (In fact, there's some evidence to the contrary.) Try to find studies that support your statement, or at least build an argument around it using careful reasoning. For example, "*It appears reasonable to assume that, since children do not have fully developed critical and analytical skills, forceful and attractive advertising may influence them in undertaking activities that adults might not consider.*" Note that the phrase says "it appears", not "it is", and "may", not "will", influence children. These are protective devices which can safeguard you from criticism that you are making an unsupported assertion. More importantly, these qualifiers bring your idea into the realm of plausibility. If you do not have direct evidence to support your statement, you cannot just assume that TV is bad – but it's not unreasonable to argue that it *may* be. Lastly, if you cannot build an argument, then at least make it clear that this is your opinion (e.g., "In this author's opinion ...").

8. Using The Foot/Endnote System Instead

As mentioned at the outset, for some reason you may need or want to use the alternative system of footnotes or endnotes, instead of in-text citations, for your references. The only main differences between this and the more popular system described above are outlined in this section. (I use "endnotes" only for simplicity – "footnotes" are the same except they're at the bottom of each page instead of being placed all together at the end.)

8.1. In the text, instead of writing the author's name and year in a parenthesis, you would simply put an endnote mark. In the endnote itself, you would provide the full source, as in the previous examples. For example,

a. In the *text*:

"In both cases the message was unlikely to be lost on a people which had learnt from bitter experience."¹

b. In the endnote:

¹ David Head, *Made in Germany: The Corporate Identity of a Nation* (London, U.K.: Hodder & Stoughton, 1992), p. 74

- Note that, with this system ...

... you include the page number in the full citation (since you can't mention it in the text)

... the year is cited at the end (since it doesn't need to be "up front" to help identify the source)

... the author's name can go first-name-first (since the notes follow a numbering system rather than being alphabetized).

8.2. If you are referring for a second time to a source mentioned previously, then:

a. If the current source has been mentioned in the immediately preceding endnote, you'll simply write:

ibid. [if it's at the exact same place, i.e. on p. 74, just like the previous endnote] - or -

ibid. p. 76 [if it's from the same source but on a different page]

- "ibid." comes from the Latin *ibidem*, "in the same place".

b. If the current source has been mentioned in some other endnote earlier, not in the immediately preceding one (i.e., other sources have been mentioned in-between), then you'll write:

Head, *op. cit.*, p. 76

- "op. cit." comes from the Latin *opus citato*, or "the work cited".

8.3. When you're finished with your work, some endnotes may be "clean", i.e. they will contain only source details, but others may include other information too. For example, some will include the page number where a reference is found (as in the example in 8.1.b. above); others will have nothing to do with references cited but will be, instead, explanatory in nature (see B.1.2. above); others may include both citation and explanatory information (for instance, an endnote may contain a full citation followed by, "For additional information also see... [followed by more citations]"). Lastly, if you use *footnotes* instead of *endnotes*, they will be scattered on various pages of your paper.

For all these reasons, if you use this system you still need to include a References list or Bibliography at the end of your paper. To help the reader find individual sources, this should take the same format as described for the more popular system described earlier, i.e., it will be alphabetized (last-names-first) and be cleaned-up (e.g., it will include the page range of a complete article, such as "18-27", instead of one specific page number within it where a particular reference was found).

* The need to essentially do the referencing work twice, once for the notes and once for the References list, is one obvious reason why this system is not being used much today. Another reason is that footnotes tend to detract from the text and make pages look awkward, while with endnotes the reader has no way of telling from the current page in the main text "who said what when" (since all he/she sees in the text is endnote numbers).

*** Hope this has helped. Let me know how to improve it. Good Luck with your work! ***
