

## Note

Among the diverse conventions established in academic writing regarding the display of the sources of information, the Harvard and Chicago styles are two distinct classic methods that can be used directly as visual formatting or with L<sup>A</sup>T<sub>E</sub>X commands.

## 1 Sources

Scientific rigour (Perdicoulis, 2012, 2013) demands academic publications to disclose their sources of information. These sources can be mentioned in footnotes, on each page that a source is cited, or can be listed at the end of the publication. While footnotes provide a quick view of the source, lists avoid repetitions and also provide a summary of all the sources used as reference.

For volumes (‘books’, from βιβλίον [Gk]) such as theses, dissertations, this end-of-the-document list is known as *Bibliography*. In shorter publications such as articles, this list is called *References* and its items have an one-to-one relationship with the in-text citations. The `backref` option of the `hyperref` package in L<sup>A</sup>T<sub>E</sub>X indicates the pages (or sections) of the respective citations.

There are many alternatives to display a bibliography (or reference list) and the corresponding in-text citations (§ 5), and two of the oldest<sup>a</sup> and still popular ones are the ‘Harvard’ (UCD, 2011b) and ‘Chicago’ (UCD, 2011a) styles. The also popular but more recent<sup>b</sup> APA style is similar to Harvard, extending its rules or guidelines to headings, punctuation, abbreviations, tables, and figures (APA, website). Nonetheless, with their tradition established in the ‘print age’, the older styles must keep up with the needs of the ‘digital age’. Newer, custom styles such as the Systems Planning<sup>SM</sup> native style (§ 2.3) are designed for multi-media publications.

<sup>a</sup> Since the late 19th C.

<sup>b</sup> Since 1929 (APA, website).

## 2 Bibliography styles

### 2.1 Harvard style

**AUTHORED BOOK** First author Last name, Initials and second author Last name, Initials (Year) Title. Place of publication: Publisher.

**EDITED BOOK** Editor(s) Last name, Initials (Ed.). (Year) Title. Place of publication: Publisher.

**CHAPTER IN AN EDITED BOOK** Author(s) Last name, Initials. (Year) ‘Chapter title’. In: Editor(s) last name, Initials. ed(s). Book title. Place of publication: Publisher.

**PRINT JOURNAL ARTICLE** First Author Last name, Initials and Second Author Last name, Initials. (Year) ‘Article title’. Journal title, Volume (Issue): page numbers.

**E-JOURNAL ARTICLE** Author(s) Last name, Initials. (Year) ‘Article title’, Journal title [Internet<sup>a</sup>], Volume (Issue), page numbers. Available from: URL<sup>b</sup> [Accessed<sup>c</sup> day month year].

**PAGE ON A WEBSITE** Webpage Author(s) Last name, Initials. (Year) Page title. Available at: URL<sup>d</sup> (Accessed<sup>e</sup> Day Month Year)

<sup>a</sup> This information is superfluous, as it is later revealed that the publication is available on the internet (incl. URL).

<sup>b</sup> Long URLs are impractical for human input; for screen documents (e.g. PDF, ePub), hyperlinks are appropriate.

<sup>c</sup> As with classic publications, what matters is when it was ‘last modified’ (v. ‘page on a website’, § 2.2).

<sup>d</sup> v. comments at ‘e-journal article’.

<sup>e</sup> v. comments at ‘e-journal article’.

### 2.2 Chicago style

**AUTHORED BOOK** First author Last name, First name, and second author First name Last name. Title: Subtitle. Edition. Place of publication: Publisher, Year of publication.

**EDITED BOOK** Editor(s) Last name, First name and last editor First name Last name, eds. Title. Place of Publication: Publisher, Year of publication.

**CHAPTER IN AN EDITED BOOK** Author(s) Last name, First name Initial(s). ‘Title of chapter.’ In Book Title, edited by First name Last name, Pages. Place of publication: Publisher, Year of publication.

**PRINT JOURNAL ARTICLE** Author(s) Last name, First name. ‘Title of Article.’ Journal Title Volume, Issue no. (Year): pages.

**E-JOURNAL ARTICLE** Last name, First name. ‘Title of Article.’ Journal Title Volume, Issue no. (Year): Pages. Accessed<sup>a</sup> Month Day, Year. DOI or URL.

**PAGE ON A WEBSITE** ‘Title of webpage.’ Website name. Last modified date, year. URL.

<sup>a</sup> As with classic publications, what matters is when it was ‘last modified’ (v. ‘page on a website’).

### 2.3 Systems Planning<sup>SM</sup> style

**AUTHORED BOOK** First author Last name, Initials, and second author Initials, Last name (Year) Title. Place of publication<sup>a</sup>: Publisher<sup>b</sup>.

**EDITED BOOK** Editor(s) Last name, Initials [Ed.] (Year) Title. Place of publication: Publisher.

**CHAPTER IN AN EDITED BOOK** Author(s) Last name, Initials (Year) Chapter title. In: Editor(s) last name, Initials [ed(s)]. Book title. Place of publication: Publisher.

**JOURNAL ARTICLE** First Author Last name, Initials, and Second Author Initials, Last name (Year) Article title (last modified)<sup>c</sup>. Journal title, Volume(Issue):page numbers<sup>d</sup>.

**WEBSITE** Webpage Author<sup>e</sup> Last name, Initials (Year)<sup>f</sup> Website title<sup>g</sup> (last modified)<sup>h</sup>. URL<sup>i</sup>.

<sup>a</sup> The place of publication is optional — for instance, this is not always clear in multi-national publishers.

<sup>b</sup> Further specifications may be necessary in the case of online publications — e.g. division, collection.

<sup>c</sup> This is optional, relevant only for online articles, and usually indicated on the first page of the article.

<sup>d</sup> Page numbers are optional — for instance, the issue may contain only a single article.

<sup>e</sup> The author of a website may be — and often is — an institution.

<sup>f</sup> This is the initial year of the website; if not available, the space can be used to indicate that this is a ‘website’.

<sup>g</sup> Indications of hierarchy or path may be necessary for easier localisation — e.g. section, subsection.

<sup>h</sup> This is optional, and usually indicated on the footer of the website.

<sup>i</sup> The shortest possible URL (or hyperlink) should be included; very long URLs are not likely to be input manually.

## 3 Identification codes

Up to the 21st C., bibliography has been predominantly printed matter, which is quite static — even considering second and subsequent editions, reprints, and alternative countions of publication. To assist in the identification of classic publications, and also their digital counterparts, a number of new bibliography fields have complemented the classic ‘author–year’ entries.

ISBN for the identification of books

ISSN for the identification of periodicals

URL for the Internet address of online documents

DOI (digital object identifier) for online documents, as an alternative to the URL

EID (electronic ID) for page numbers in ‘online+print’ journals

Besides the above *identification* codes, there are also *localisation* codes such as the ‘call numbers’ (i.e. resource IDs) of publications in libraries, with specific validity (Perdicoulis, 2014).

## 4 Bibliography and L<sup>A</sup>T<sub>E</sub>X

### 4.1 BibT<sub>E</sub>X database

Bibliography *metadata* can be kept in `.bib` (BibT<sub>E</sub>X) files, in which each entry is registered with appropriate *metadata* (Perdicoulis, 2015). These databases can be managed either manually or by special front-end such as *BibDesk*. The bibliographic entries can be called from within the `.tex` files, as demonstrated in § 5.

```
@book{book,
  author = {},
  title = {},
  publisher = {},
  year = {},
  address = {},
  edition = {},
  note = {},
  isbn = {}
}
```

```
@article{article,
  author = {},
  title = {},
  journal = {},
  year = {},
  volume = {},
  number = {},
  pages = {},
  note = {}
}
```

### 4.2 Reference managers

Although it is possible to edit a L<sup>A</sup>T<sub>E</sub>X bibliography file manually (e.g. in *TeXShop*), there are front-end applications such as *BibDesk* that function as ‘reference managers’. Other reference managers with L<sup>A</sup>T<sub>E</sub>X integration include *Zotero*, *Papers*, *Mendeley*, and *EndNote*.

Important qualities of reference managers to consider: (a) online reference search and validation (e.g. in *Google Scholar*, *CrossRef* or *WoS*); (b) capacity to store and retrieve files (e.g. articles, images) locally or remotely; (c) maintenance or subscription fees; (d) import/ export facility and reliability.

### 4.3 L<sup>A</sup>T<sub>E</sub>X link to a ‘.bib’ file

```
%in the preamble
\bibliographystyle{plain} %see list below
%at the end of the document
\bibliography{refdb} %points to the ‘refdb.bib’ file
```

PLAIN ETC. (the 4 base styles) — square braces, numerical, commas

PLAINNAT ETC. — square braces, author–year, commas

AGU (American Geophysical Union) — square, author–year, semi-colon

EGU (European Geosciences Union) — round, author–year, semi-colon

AGMS, DCU, KLUWER (Harvard set) — round, author–year

COSPAR (Committee on Space Research) — slashes, numerical, comma

NATURE (Journal Nature) — superscripts

### 4.4 L<sup>A</sup>T<sub>E</sub>X manual entries

```
\begin{thebibliography}{10}
\bibitem[Doe et al.(2012a)]{doe12a} Info. . .
\bibitem[Doe et al.(2012b)Doe, Roe, and Deer]{doe12b} Info. . .
\end{thebibliography}
```

### 4.5 Adjusting fonts and spacing

```
\renewcommand{\bibfont}{\small}
\setlength{\bibsep}{2pt}
```

## 5 Citations

A well-balanced text has the ‘right’ density of citations, and this may vary across academic traditions. Sources should be cited for the sake of *traceability* of information (Perdicoulis, 2012), and citations can be made in a variety of styles (§ 4.3).

### 5.1 L<sup>A</sup>T<sub>E</sub>X packages

In Natural sciences, the `natbib` L<sup>A</sup>T<sub>E</sub>X package (Daly, 2010) contains a number of pre-defined options for citations, each one following the punctuation conventions of different academic traditions. The punctuation of the pre-defined citations can be changed with `\setcitestyle` (Daly, 2010).

### 5.2 L<sup>A</sup>T<sub>E</sub>X in-text entries

In-text citations can be produced in L<sup>A</sup>T<sub>E</sub>X with variations of `\cite`.

CITATION STYLE	CODE	OUTPUT
Author (year)	<code>\cit{doe12a}</code>	Doe et al. (2012a)
Author (year, page)	<code>\cit{p.2}{doe12a}</code>	Doe et al. (2012a, p.2)
(Author, year)	<code>\citep{doe12a}</code>	(Doe et al., 2012a)
(Author, year, page)	<code>\citep{p.2}{doe12a}</code>	(Doe et al., 2012a, p.2)
All authors, year	<code>\citealp*{doe12b}</code>	Doe, Roe, and Deer, 2012b
(Personal communication)	<code>\citext{pers.\ comm.}</code>	(pers. comm.)
All authors	<code>\citeauthor*{doe12b}</code>	Doe, Roe, and Deer
(Year)	<code>\citeyearpar{doe12b}</code>	(2012b)

*Selected in-text entry styles and variations of natbib’s \cite command*

### 5.3 Special terms

TERM	MEANING	USE
<i>ibid.</i>	<i>ibidem</i> [L], in the same place	Refers to a work that has been mentioned immediately before
<i>apud</i>	<i>apud</i> [L], at, by, in the writings of	Indicates the origin of an indirect citation
<i>cf.</i>	<i>confer</i> [L], compare	Calls for a comparison with another written work or another part of the same written work

*Latin terms often encountered in citation environments*

## Bibliography

APA — American Psychological Association (website) What is APA Style<sup>®</sup>?

Daly, P. (2010) Natural Sciences Citations and References (Author–Year and Numerical Schemes). *Comprehensive T<sub>E</sub>X Archive Network: natbib* — Package documentation.

Perdicoulis, A. (2015) *Metadata*. Perdicoulis Publishing: Folio Division, Technical Collection.

Perdicoulis, A. (2014) *Cataloguing*. Perdicoulis Publishing: Folio Division, Technical Collection.

Perdicoulis, A. (2013) The scientific qualifier. *oestros*, **11**

Perdicoulis, A. (2012) Scientific writing. *oestros*, **5**

UCD (2011b) *Harvard Referencing Style*. University College Dublin Library: Guide 69.

UCD (2011a) *Chicago Referencing Style*. University College Dublin Library: Guide 68.

— Dummy entries: for illustration purposes only —

Doe, J., J. Roe, and J. Deer (2012b) *Extended Volume*. Imaginary city: Unreal publisher.

Doe, J., J. Roe, and J. Deer (2012a) *Condensed Volume*. Imaginary city: Unreal publisher.