

REFERENCING IN ACADEMIC DOCUMENTS
Official referencing guidelines of the
Department of Business Management

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REFERENCING IN ACADEMIC DOCUMENTS

1 WHY ARE REFERENCES USED?

All academic documents (including research reports, assignments, dissertations, theses, research scripts, journal articles and conference papers) must include citations and a list of references at the end listing the sources of information used in compiling the document. Referencing is a standardised method of acknowledging the sources of information and ideas that a researcher have used in a way that uniquely identifies each source. Referencing is necessary to:

- provide support for factual statements/claims made in an academic document,
- enable the reader to verify quotations and/or information,
- enable the reader to follow up and read more fully the cited author's arguments, and
- avoid plagiarism.

2 PLAGIARISM

2.1 WHAT IS PLAGIARISM?

The University of Pretoria's Plagiarism Prevention Policy (University of Pretoria, 2009:3) defines plagiarism as follows:

"Plagiarism is the presentation of someone else's work, words, images, ideas, opinions, discoveries, artwork, music, recordings or computer-generated work (including circuitry, computer programs or software, websites, the Internet or other electronic resources) whether published or not, as one's own work, or alternatively appropriating the work, words, images, ideas, opinions, discoveries, artwork, music, recordings or computer-generated work (including circuitry, computer programs or software, websites, the Internet or other electronic resource) of others, without properly acknowledging the source, with or without the source's permission."

Plagiarism occurs whenever you present another person's words, ideas or opinions – whether published or unpublished and regardless of the form or media in which the words, ideas or opinions were originally expressed – as your own **without acknowledging the source**. In essence, plagiarism refers to the "theft" of someone else's intellectual capital. Plagiarism does not only occur when you use the exact words or expressions of the original source without acknowledgement, but even if you paraphrase the original source without acknowledgement.

From a practical point of view, you will be committing plagiarism whenever you:

1. copy information from **any original source**, including a journal article, book, web page or any other electronic medium – either directly or in an amended (paraphrased) format – and present the information as your own thoughts, opinions and/or conclusions without acknowledging the original source;
2. translate information taken from any original source and present it as your own thoughts, opinions and/or conclusions without acknowledging the original source;

3. copy from a current or previous student's assignments or submit a current or previous student's assignments as your own;
4. copy and paste information **directly** from an electronic source (e.g., a web site, electronic journal article or any other electronic medium) without paraphrasing or placing it in quotation marks **even if you acknowledge the original source**;
5. resubmit the whole or sections of your own previously graded (evaluated) work as a new assignment;
6. copy information from course material, including study guides, PowerPoint class slides, course notes/handouts, previous test or exam memoranda or previous homework answers without acknowledging the source;
7. present work as your own independent work when, in fact, it has been produced in whole or in part in cooperation (collusion) with other people; **or**
8. submit work as your own independent work when, in fact, it has been produced in whole or in part by a "ghost-writer" or any other party on your behalf.

2.2 WHY IS PLAGIARISM WRONG?

Because plagiarism constitutes the theft of someone else's "intellectual property", it is regarded as **unethical** and even **illegal** (i.e., in some instances, plagiarism may constitute a criminal offence in terms of the Copyright Act). Plagiarism is unethical because:

1. it is in conflict with the University's values of trust and academic integrity;
2. it is dishonest;
3. it shows disrespect for the rights of the original author and for the values of the academic community;
4. it may tarnish the reputation of the University, your academic department and your supervisor; and
5. it casts suspicion on the honest work of other students.

2.3 WHAT ARE THE POTENTIAL CONSEQUENCES FOR STUDENTS WHO COMMIT PLAGIARISM?

Because plagiarism is regarded as a very serious violation of the University's ethical values, it is regarded as a serious form of misconduct which can lead to a student's expulsion from the University (University of Pretoria, 2009:3).

The University's policy in this regard can be found on the Internet at:
<http://www.library.up.ac.za/plagiarism/index.htm>

Please note the following extract from the University's Plagiarism Prevention Policy (University of Pretoria, 2009:2):

"(a) Irrespective of whether plagiarism occurred with or without the intent to plagiarise, it remains plagiarism.

(b) Plagiarism is a form of misconduct for which a student may be disciplined in terms of the University's disciplinary code (when an assignment is submitted for assessment, plagiarism is the equivalent of cheating in an exam).

(c) Plagiarism is also not dependent on the verbatim presentation of a specific number of words, as, under certain circumstances, the use of a single phrase or idea can be judged to constitute plagiarism.”

The Department of Business Management regards plagiarism in a very serious light. Students who commit plagiarism by copying the work of others or by using the ideas of other authors without due recognition will receive a zero mark for the particular assignment and may also face formal disciplinary charges in accordance with the University’s Plagiarism Prevention Policy.

In addition, you have to include a signed copy of the prescribed declaration regarding plagiarism in all your assignments (see Annexure A, p. 69).

2.4 HOW CAN I AVOID COMMITTING PLAGIARISM?

You can avoid committing plagiarism by considering the following guidelines:

1. Make sure that you understand what plagiarism is by consulting the following web pages:
 - o <http://www.library.up.ac.za/plagiarism/index.htm>
 - o <http://www.plagiarism.org/>
2. Do not intentionally commit plagiarism (e.g., if you are pressed for time). It may lead to your expulsion from the university.
3. Only hand in original work that you have prepared yourself. Do not copy another student’s work, submit work that someone else has prepared on your behalf, or submit work that you have previously submitted as an assignment in the same or in a different course.
4. Use the prescribed referencing style outlined in this document.
5. Always paraphrase information taken from an original source into your own words and acknowledge the source by including an appropriate citation (i.e., in-text reference). When paraphrasing, you have to substantially rewrite the original information. It is not sufficient to replace one or two words in a sentence or paragraph with synonyms.
6. Do not cut and paste information directly from electronic sources, such as the Internet or electronic journal articles. Either paraphrase the information in your own words or present the information as a direct quotation. Always use the correct referencing style whenever you take information from an electronic source.
7. **IMPORTANT:** Always check a document before submission for possible instances of plagiarism via the Turnitin module built into the relevant course web site in clickUP (see Section 10 on p. 63).
8. You must complete and sign the declaration regarding plagiarism contained in Annexure A on p. 69 of this document and include it in all written documents submitted for evaluation. No written work will be accepted unless the declaration has been completed and signed, and is included in the document.

To avoid plagiarism ...

Paraphrase the original words **or quote** the source directly
AND
include a citation to the original source.

3 WHEN TO USE REFERENCES

According to McLean (2001:9), there are five basic sources of information for anything you write in an academic document:

1. You have observed it directly yourself.
2. Everyone in your intended audience knows it from own previous experience (i.e., it is “common knowledge”).
3. It follows logically or mathematically from other things you have said or reported (e.g., from statistical results).
4. You have made it up yourself (e.g., you have formulated a hypothesis based on previous research findings or have reached a conclusion based on an argument substantiated by previous research findings).
5. **You have learnt it from someone/somewhere else.**

Any statement of information that falls into the last category – i.e., information that you have learnt from someone/somewhere else – must be referenced. This, *inter alia*, means that references should be used whenever you:

1. quote the exact words of another author (also see Section 6.2.1, p. 13);
2. refer to, paraphrase or summarise someone else’s ideas, theories, arguments and/or research in your own words;
3. present another author’s interpretation, point of view, opinion or understanding about an issue in your own words;
4. state specific factual information, such as statistics, graphs, facts, verbal interviews or diary entries obtained from another source;
5. present a table, graph, figure or diagram taken or adapted from another source or when you construct a table, graph, figure or diagram from data or information taken from another source (i.e., a source other than data that you have collected yourself).

You will be committing plagiarism if you fail to use proper references in the situations mentioned above (also see Section 2, p. 1).

Two types of references can be distinguished, namely:

- **citations**, also known as in-text references (e.g., “Larsen (2002:13) recommends that ...”), and
- detailed references contained in a **list of references** at the end of an academic document.

These two types of references go hand in hand. In other words, whenever you have a citation, you should also have a corresponding entry in the list of references at the end of your document (and *vice versa*).

Section 6 discusses the basic format of citations, while Section 7 discusses the basic format of the list of references. The detailed methods used to refer to different types of sources are discussed in Section 8. Carefully study all three these sections.

4 EVALUATING AND SELECTING SOURCES

When searching for relevant literature for an academic assignment, it is important to carefully consider the **authority**, **credibility**, **recency**, **quality** and **relevance** of the literature sources that you are reading.

When writing an academic document, you should give priority to:

- articles from peer-reviewed academic journals, such as those available on the Library's e-journal platforms (see: <http://www.library.up.ac.za/journals/journalsplatforms.htm>);
- textbooks or books written by academic authors;
- articles from reputable professional journals or magazines aimed at practitioners in a particular industry (e.g., the Harvard Business Review);
- reports published by government departments (e.g., Statistics South Africa), parastatal organisations (e.g., the South African Reserve Bank) or credible international as well as non-governmental organisations (e.g., the United Nations);
- subject-specific dictionaries, encyclopaedia as well as reference works compiled by acknowledged subject-specialists (see: <http://www.library.up.ac.za/ebooks/subref.htm>).

Note: Academic journals differ widely in their quality and reputation. Just because an article was published in an academic journal, does not mean that the specific journal or article is of a high quality. Use the following resources to check whether a specific journal is of a high quality:

- Use the "Find e-Journals" search options on the UP Library's home page to determine if the journal is listed on one of the e-journal databases to which the UP Library subscribes. The journals included in the UP Library's e-journal databases are generally of an acceptable quality.
- Check whether the journal is listed on one or more of the following lists of prestigious journals:
 - The Thompson Reuters Web of Science (ISI) list (<http://www.library.up.ac.za/journals/docs/ISI.pdf>)
 - The IBSS list (<http://www.library.up.ac.za/journals/docs/IBSS.pdf>)
 - The Australian Business Deans Council list (<http://www.abdc.edu.au/pages/abdc-journal-quality-list-2013.html>)
 - The Department of Higher Education's list of South African academic journals (<http://www.library.up.ac.za/journals/docs/DHET.pdf>)
- Check that the journal is not listed as a potential "predatory" journal (<http://scholarlyoa.com/individual-journals>).
- If unsure, ask your study leader or information specialist (i.e., subject librarian).

The following literature sources are problematic and should **not** be used in an academic document:

- Anonymous or undated sources;
- Wikipedia or similar online encyclopedias;
- Articles in popular (non-academic) magazines (e.g., Cosmopolitan, Popular Mechanics, Huisgenoot / You and Fair Lady);
- Any sources that are not in the public domain (e.g., internal company reports);

- Entries in blogs, wikis, chat rooms and on other social media platforms (e.g., facebook, twitter, YouTube);
- Newspaper articles (especially where factual claims cannot be verified from multiple sources); and
- Web pages, except where the author of or organisation responsible for the web page is known to be reputable.

Consider the following general guidelines when searching for relevant sources:

1. Be sceptical about everything you read, especially on the Internet, until its credibility and quality have been verified.
2. Quinton and Smallbone (2006:79-80) provide the following checklist for evaluating the authority, credibility, recency and quality of sources found on the Internet:
 - Is the identity of the author, publisher or organisation responsible for the document known?
 - Are the affiliations of the author(s) clearly stated?
 - Is there any information available about the person or organisation responsible for the document that can be used to judge how credible/authoritative/reputable it is?
 - Is the publication date or revision date of the document clearly stated?
 - Is a printed version of the document available? (This may reinforce its credibility)
 - Are the sources used in compiling the document clearly listed? (This should add to the document's credibility and make it possible to verify its contents.)
 - Is there an editor or any other evidence that the document has been through an editorial or peer review process?
 - Is the grammar and spelling used in the document correct?

The more negative (“No”) answers you get to these questions, the lower the credibility and authority of the particular source.

3. Reports, books and articles by consultants, “industry experts” or consulting firms may be used as sources, but should generally be treated with caution unless their perspectives have been subjected to academic/industry scrutiny.
4. Many academics publish working papers, draft articles and non-peer-reviewed conference papers on the Web. While these are legitimate sources of information, one should preferably always use the published, peer-reviewed versions of such papers.
5. If you cannot find the answer you want in a reputable subject-specific reference work, then be sure to use **reputable** general dictionaries (e.g., the Oxford Dictionary) or encyclopaedias (e.g., the Encyclopaedia Britannica).

TIP: Several subject-specific dictionaries and encyclopedias are available in the UP Library. See the following links to the UP Library catalogue:

For dictionaries:

[http://explore.up.ac.za/search~S9/X?SEARCH=\(dictionary\)&SORT=D&b=eco](http://explore.up.ac.za/search~S9/X?SEARCH=(dictionary)&SORT=D&b=eco)

For encyclopaedia:

[http://explore.up.ac.za/search~S9/X?SEARCH=\(encyclopedia\)&SORT=D&b=eco](http://explore.up.ac.za/search~S9/X?SEARCH=(encyclopedia)&SORT=D&b=eco)

For general online reference sources:

<http://www.library.up.ac.za/ebooks/subref.htm>

6. Wherever possible, verify factual information or statistics from multiple sources.
7. In postgraduate assignments, the majority (i.e., >75%) of the cited sources should be academic journal articles, preferably from the UP Library's e-journal databases.
8. You need to show that you have read the most recent literature relevant to an assignment. It is, therefore, important to:
 - cite the most recent sources relevant to the assignment;
 - where possible, include several, relevant journal articles from the current year and the last 3 years; and
 - only cite sources that are older than 10 years if you have a very good reason for doing so.
9. When citing textbooks, always cite the latest edition available to you. Do not cite multiple editions of the same textbook, except if there are differences between editions that you wish to point out in an assignment.

5 USING ENDNOTE

The referencing style outlined in this document has been implemented in EndNote, a reference management software program. EndNote is available for free to all registered students at the University of Pretoria. Annexure B (on p. 70) summarises the advantages and disadvantages of using EndNote. To experiment with EndNote:

- Download the EndNote software for Windows or Mac from: <http://up-za.beta.libguides.com/c.php?g=345213&p=2325344> (see "How to download Endnote" on the left-side of the screen) or from <http://www.library.up.ac.za/referencing/index.htm> (See the EndNote PC / Mac link on the left-hand side of the screen).
- Install EndNote on your computer by following the installation instructions available at: https://clickup.up.ac.za/bbcswebdav/xid-6133914_1
- Download the Harvard (UP EMS) output style from <http://endnote.com/downloads/style/harvard-ems-university-pretoria-economics-and-management> and install it by following the installation instructions available at https://clickup.up.ac.za/bbcswebdav/xid-6133914_1
- View the following EndNote training videos on YouTube:
 - EndNote on Windows: The Short Course (<https://youtu.be/dA8SAMZo0xw>)
 - EndNote on Macintosh: The Short Course (<https://youtu.be/p9ggVLsTWVg>)
- See the EndNote "Get Started" guide at: <http://endnote.com/training>
- See the "Little EndNote How-To Book" available under "Get Started" at: <http://endnote.com/training>
- Contact Mrs Bettie de Kock (bettie.dekock@up.ac.za) to enquire about the EndNote training presented by the UP Library.

Once you have experimented with EndNote, you may choose to use the software or do referencing manually.

6 GENERAL PRINCIPLES: IN-TEXT REFERENCING

6.1 THE BASIC FORMAT OF CITATIONS

1. Use citations (also known as in-text references) to a) acknowledge the source(s) of information on which a specific sentence or paragraph is based, b) provide support for factual statements made in an academic document, c) acknowledge the source of a direct quotation, and d) support your own arguments and reasoning. See Point 8 on the next page for examples of paragraphs containing citations.
2. When writing an academic document, you need to show that you are able to integrate and synthesise information from multiple sources. Do the following to demonstrate this:
 - Where possible, cite multiple sources in the same paragraph;
 - Use different sources in consecutive paragraphs;
 - Do not base multiple, consecutive paragraphs on a single source or write a whole page based on a single source.
3. Citations generally have the following basic structure:

Citations included as part of a sentence: According to Smith (1999:23), consumers prefer ...

or

Citations included at the end of a sentence: South Africa has one of the highest per capita HIV prevalence and infection rates in the world (Van Aardt, 2002:1).
4. When a citation is placed at the end of a sentence, it should appear before the full stop. When a citation is placed at the end of a paragraph, it should appear at the end of the last sentence before the full stop. In short, the full stop always follows after the right-hand bracket of a citation.
5. Never refer to an author's first name or to the title of a source in the main body of an academic document.
 - ✘ Wrong: In his book *Constructing a Good Dissertation*, Erik Hofstee (2006:5) argues that ...
 - ✓ Correct: Hofstee (2006:5) argues that ...
6. Never include the initials or first names of authors in citations; only their surnames.

Wrong:

 - ✘ According to John Creswell (2016:3), qualitative research ...
The central phenomenon, or topic to be explored, is at the heart of qualitative research (Creswell, J.W., 2016:3).

Correct:

 - ✓ According to Creswell (2016:3), qualitative research ...
The central phenomenon, or topic to be explored, is at the heart of qualitative research (Creswell, 2016:3).

7. Some American authors add the abbreviations Sr. or Jr. to their surnames (e.g., John Watson Sr.), while others add Roman numbers such as II, III or IV (e.g., Joshua Beck III). You should omit these abbreviations or Roman numbers from the surnames in in-text citations and in the list of references.
8. When writing a paragraph, one should include a citation in every sentence that is based on information taken from another source. If a whole paragraph is based on information taken from a single source, then the citation is either placed at the start of the first sentence or at the end of the last sentence (see the examples below).

Example of a paragraph including sentences based on information taken from different sources:

Although society is increasingly becoming educated, marketers must recognise that there is also a sizable group of consumers who are functionally illiterate (London & Della Bitta, 1993:51). This is notable in a developing country such as South Africa where more than 20% of the adult population are illiterate (Statistics South Africa, 2001:43). Harrison-Walker (1995:61) emphasizes that illiteracy is an area demanding the immediate attention of marketers if they are to continue to function effectively in the field of marketing communication. Marketing to functionally illiterate consumers implies that adjustments have to be made in advertising messages, packaging and usage instructions to account for their lower levels of information processing skills (London & Della Bitta, 1993:51). Simplified language on packages will lead to greater initial product choice because functionally illiterate consumers will be better able to evaluate the product. This, in turn, may lead to repeat purchases as they are able to derive more satisfaction from the products they buy (Jae & Delvecchio, 2004:352).

Example of a paragraph based on information taken from a single source:

Functionally illiterate consumers struggle with the elements of the shopping environment that most consumers take for granted. They spend considerable energy and cognitive resources assessing value and making decisions from information that literate consumer process automatically. Moreover, functionally illiterate consumers incur different emotional and behavioural costs from shopping while displaying creativity in coping with such costs (Viswanathan *et al.*, 2005:16).

The last example indicates that the whole paragraph is based on information taken from the source written by Viswanathan *et al.* (2005). Note that in this case, the citation is placed at the end of the last sentence in the paragraph and **before** the full stop. There should not be a full stop before the left-hand bracket of the citation; only one after the right-hand bracket.

9. In most cases, it is best to place a citation at the end of a sentence as is shown in Option 1 below. This saves space and improves the readability and flow of an academic document. For example:

Option 1: There is some disagreement on how best to report extremely small p -values. Some researchers prefer to report $p < 0.001$ if a statistical program prints the p -value as 0.000 (Wright, 2003:125).

Option 2: Wright (2003:125) points out that there is some disagreement on how best to report extremely small p -values. Some researchers prefer to report $p < 0.001$ if a statistical program prints the p -value as 0.000.

Use Option 2 (i.e., refer to the author as part of the sentence) when you:

- want to emphasise that a particular argument or point was raised by a specific author or authors;
 - are discussing and comparing the points of view of different authors; or
 - are presenting a specific definition or explanation by a particular author.
10. It is not appropriate to use Option 2 (i.e., refer to the author as part of the sentence) when the “author” of a source is an organisation or institution and not an identifiable human being (see the examples below).

How to refer to sources if the author is not an identifiable human being:

Wrong: According to Statistics South Africa (2007:23), nearly 20% of all adult South Africans are functionally illiterate.



Wrong: The World Food Programme (2006:23) argues that global warming poses a serious threat to the sustainability of current agricultural practices.



Correct: Nearly 20% of all adult South Africans are functionally illiterate (Statistics South Africa, 2007:23).

Correct: Global warming poses a serious threat to the sustainability of current agricultural practices (World Food Programme, 2006:23).

To summarise: You may use Option 2 to emphasise the identity of the authors of the source from which you have borrowed information, but only if the authors are identifiable human beings, not an organisation. In all other cases, use Option 1 by placing the citation at the end of a sentence.

11. When citations are included as part of the sentence, the citations should fit into the flow of your writing. Some useful phrases are:

Findings from Russell (1999:10-13) indicate that ...

McKenzie (1998:112) challenges the view that ...

Lee (2000:367-369) contends/declares/postulates/asserts that ...

Briggs and Stratton (1990:10) state/mention/posit that ...

As Wolston (1997:34) reports, ...

Black, Anderson and Tatham (1999:112) argue/are of the opinion that ...

Huynh and Kuhn (1992:10) point out that/provide evidence that ...

Patel (1989:11) refers to ...

Chen and Yi (1993:12-24) identify ...

According to Smith *et al.* (1996:118-120), ...

As is explained by Smith and Jones (2009:12), ...

Watts (1999:2) comments/argues/claims/asserts/maintains/notes that ...

Hansen (1988:4) has investigated ...

Nguyen (1995:112) discusses ...

When using “According to ...” one should always place a comma here. The same principle applies to the next example.

12. The verb following after a reference to a source with two or more authors should always take the plural form. For example:

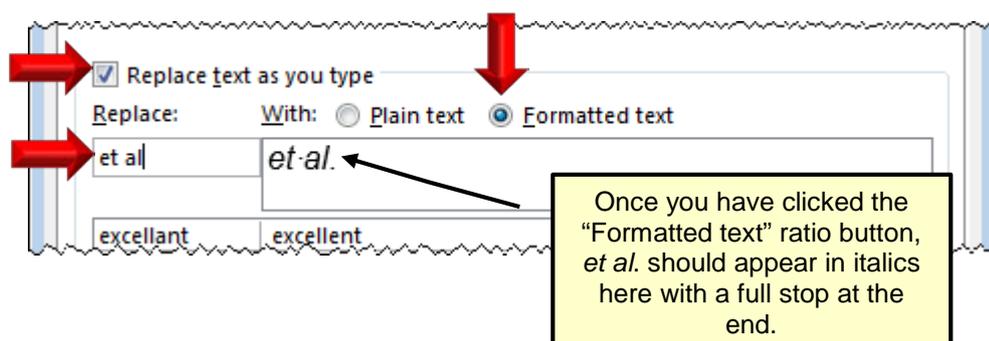
Smith and Jones (2013:12) **define** ...

Saunders *et al.* (2012:416) **explain** that ...

13. Statements such as “Several studies have ...” or “A number of studies have ...” should be supported by three or more citations.
14. If a source has multiple authors, then the authors should be listed in a citation and in the list of references in the exact same order in which they are listed in the source. Never change the order in which the authors of a source are listed.
15. When a source has three or more authors, the surnames of all the authors must be listed in the first citation to the specific source in a document. Thereafter, only the surname of the first author is shown in all subsequent citations. The surnames of the second and later authors are replaced with the abbreviation *et al.* For example:
 First citation: Saunders, Lewis and Thornhill (2012:128) conceptualised the ...
 Second and later citations: Saunders *et al.* (2012:130) also mention ...
16. The abbreviation *et al.* should:
 - always be typed in italics followed by full stop;
 - only be used in the second or later citations to sources with three or more authors; not in citations to sources with one or two authors.

TIP: You can easily set up MS Word to automatically type *et al.* in italics followed by a full stop. Do the following:

- i. Open a new, blank document in MS Word.
- ii. Type the abbreviation *et al.* in italics followed by a full stop in the document. If Word changes the “e” to a capital letter, change it back to a lower case letter.
- iii. Select the typed text (including the full stop) as you would select any text in Word.
- iv. Press Alt, T and A to open the “AutoCorrect” dialogue box. Alternatively, choose File, Options, Proofing, AutoCorrect Options.
- v. On the AutoCorrect dialogue box, a) select the “Formatted text” radio button, b) type et al (with no full stop at the end) in the “Replace” text box, and c) tick the “Replace text as you type” tick box (see screen print below).



- vi. Click the “Add” button to add the new entry to the autocorrect list.
- vii. Click “OK” to close the “AutoCorrect” dialogue box.
- viii. If you now type et al and press the space bar, it will automatically be changed to *et al.* with a full stop added at the end.
- ix. You only have to complete steps i to vii once on a specific computer to set up the *et al.* autocorrect option in MS Word.

17. If a source has two or more authors, the ampersand (&) sign may be used in place of the word “and”, but only where authors are listed in citations that appear in brackets as well as in the list of references. However, the ampersand sign (&) may not be used when the authors are listed as part of a normal sentence.

✗ Wrong: According to Gardner & Sheldon (1967:12), all diagnostic procedures should be explained to the patient.

✓ Correct: According to Gardner **and** Sheldon (1967:12), all diagnostic procedures should be explained to the patient.

✗ Wrong: All diagnostic procedures should be explained to the patient (Gardner and Sheldon, 1967:12).

✓ Correct: All diagnostic procedures should be explained to the patient (Gardner **&** Sheldon, 1967:12).

18. Citations should always include page numbers whenever page numbers are included in the original source that you have read. Consider the following:

- In each citation, indicate the specific page or pages from which you took information.
- Include the full page range (i.e., start page to end page) when citing an article as a whole. For example: “Smith and Jones (2013:12-34) were the first researchers to draw attention to ...”
- In an in-text citation, the page number or page range should follow directly after the colon with no spaces before/after the colon or before/after the hyphen indicating a page range.
- Page numbers may only be omitted for information obtained from the World Wide Web in .html format or in the case of an original source without any page numbers (also see Section 8.15 below).

19. Table 1 below summarises the requirements explained in Points 14 to 18 above by showing how sources with one, two and three or more sources should be cited at the start and end of sentences.

Table 1: A summary of the formats of citations

Number of authors	Citation	Start of sentence	End of sentence
1 author	1 st citation to source	Creswell (2016:5) defines ...	The central phenomenon is the main topic being explored in a qualitative study (Creswell, 2016:5).
	2 nd or later citation to source	Same as above.	Same as above.
2 authors	1 st citation to source	Bryman and Bell (2012:119) mention ...	The precise measurement of specific variables is a characteristic of quantitative research (Bryman & Bell, 2012:119).

Number of authors	Citation	Start of sentence	End of sentence
	2 nd or later citation to source	Same as above.	Same as above.
3 or more authors	1 st citation to source	Saunders, Lewis and Thornhill (2016:12) describe ...	There are several ethical principles that researchers should consider (Saunders, Lewis & Thornhill, 2016:12).
	2 nd or later citation to source	Saunders <i>et al.</i> (2016:12) describe ...	There are several ethical principles that researchers should consider (Saunders <i>et al.</i> , 2016:12).

20. Do not cite guideline documents, such as the referencing guidelines or the document on technical care requirements, which you may have consulted while writing an academic document unless you have written specific sentences or paragraphs based on information taken from these documents.
21. See the document on “*Technical Care Requirements*” for guidance on how to use citations when you have inserted a table or figure into an academic document.
22. Variations on the basic structure of citations are discussed in Section 6.2 below.

6.2 SPECIAL CASES OF IN-TEXT CITATIONS

Four special cases of in-text citations are discussed in this section. These include a) the use of direct quotations, b) citations to sources that you have not read/consulted directly, c) citations to more than one source and d) citations to two or more sources by the same author(s) published in the same year.

6.2.1 Direct quotations

Direct quotations of the exact words of another author should be used sparingly. One should rather paraphrase the ideas, arguments and opinions of others into your own words. Direct quotations should only be used if the original is so well stated that putting it in one’s own words would be detrimental to the final effect (e.g., in the case of a very striking statement by another author), or if the original words are needed for purposes of analysis or discussion (e.g., in the case of a definition).

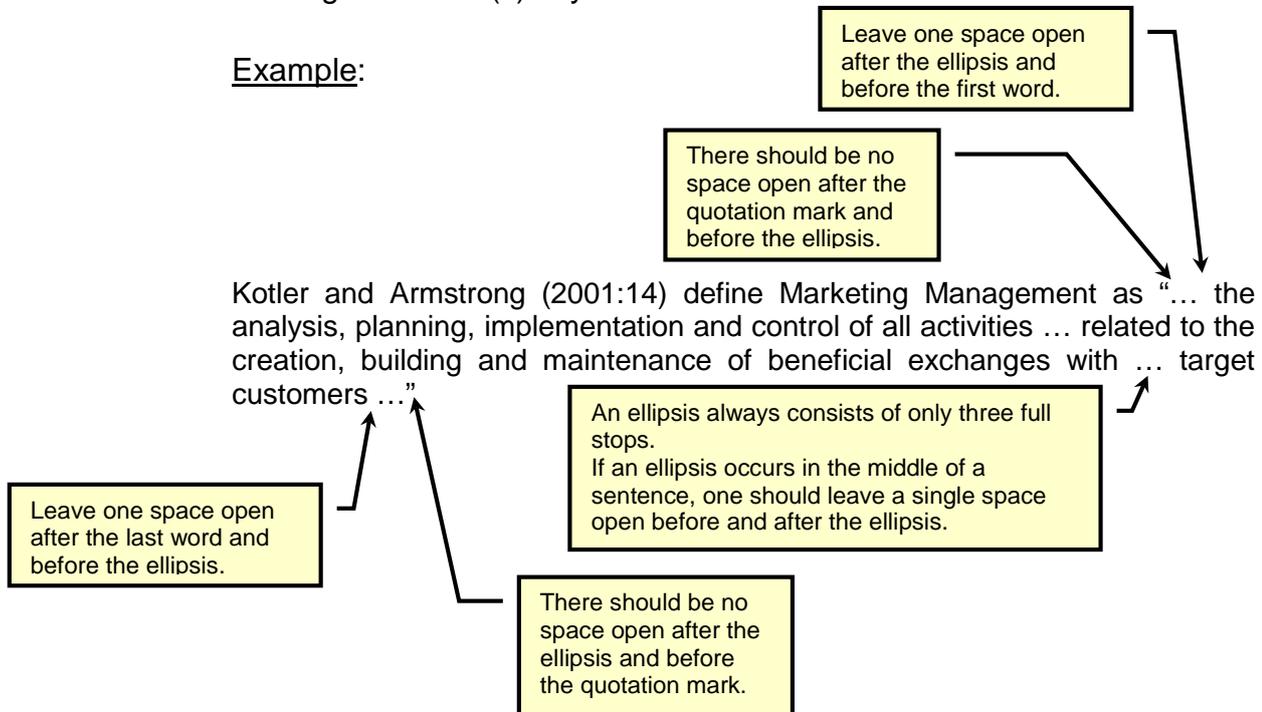
Consider the following rules when quoting directly:

1. **Use direct quotations sparingly!** As a general rule of thumb, one should not have more than two short direct quotations per page.
2. Quote the original author’s exact words, including any spelling or grammar errors.
3. If the original wording contains spelling or grammar errors, one has to point these errors out by placing the word [sic] in square brackets in the quote directly after the error. For example: “It is a common concept [sic] to use marketing as a tool for ...” However, it is not necessary to use [sic] to highlight

the American spelling of quoted words such as “color” or “fulfill” when quoting from an American source.

4. If one leaves out part of the original text in a direct quotation, this is indicated with an ellipsis (see the example below). Be careful not to overdo the use of ellipses. If the quotation becomes very fragmented, it is better to paraphrase the original author(s) in your own words.

Example:



Note the following regarding the example above:

- An ellipsis consists of three full stops (...) only.
 - If an ellipsis follows directly after or before a quotation mark, there should be no space between the quotation mark and the ellipsis.
 - There should, however, be one space after the ellipsis and before the first word at the start of a direct quotation. Similarly, there should be one space open after the last word and before the ellipsis at the end of a direct quotation.
 - If an ellipsis occurs in the middle of a sentence, one should leave a single space open before and after the ellipsis.
5. Words may be inserted into a direct quotation to improve the readability and clarity of the quoted sentences. The inserted words are placed in square brackets []. For example: Firms should give serious attention to market segmentation to ensure that they "... thoroughly understand and adequately respond to the core values and needs of [their] customers" (Ter Hofstede *et al.*, 1999:1). However, be careful not to overdo the use of insertions.
 6. Avoid long quotations. It is acceptable to quote a single striking sentence or one short paragraph at a time. If you have to use a long quotation (say, a quotation of more than three lines), then consider indenting the quotation away from both the left- and right-hand text margins with 1 cm. See the following example in which the box borders represent the text margins:

Hofstee (2006:xvii) has the following to say about the goals of a postgraduate dissertation or thesis:

“Dissertations are written in order to demonstrate competence to examiners so that they may, in good conscience, award you the degree that you enrolled for. Given that truth, in order to maximise your chances of getting the degree, your primary goal should not be making *the* major contribution in your field; it should not be to dazzle the people in your department with your brilliance – it should be to hand in a solid work within a reasonable amount of time.”

7. Quotations within a quotation are enclosed in single quotation marks, e.g. “It was Richard Branson, entrepreneurial owner of the Virgin Group, who is credited with the saying ‘agents are more important than customers.’” (Munday, 1996:21).
8. One may emphasise part of a direct quotation by typing it in bold or italics, but one then has to indicate that this is one’s own emphasis by including the words (own emphasis) in round brackets after the quotation. Own emphasising should be restricted to a minimum. Choose one method of emphasis (i.e., bold or italics) and use it consistently throughout your document.
Example: According to Smith (1977:70), the ancients believed that “... a baby born with teeth already formed would ‘bite the world’ and was **made for villainy**” (own emphasis).
9. Quotations should be carefully integrated with rest of the text. It is best **not** to:
 - start a new section of an academic document with a quotation;
 - have paragraphs that consist only of direct quotations; or
 - use quotations that are not logically and directly connected to the preceding or subsequent paragraphs.

The following example shows the **incorrect** use of a direct quotation:

2.4.2 Service brand evidence

“Brand evidence is the set of brand associations directly experienced by the consumer during the pre-purchase and consumption stage of decision-making. The brand evidence provides the descriptors of the brand in the form of the brand name, price, servicescape, core service, employee service, self-image congruence and feelings aroused during usage.” (O’Cass & Grace, 2005:126.)

The following approach is **correct**:

2.4.2 Service brand evidence

O’Cass and Grace (2005:126) define brand evidence as: “... the set of brand associations directly experienced by the consumer during the pre-purchase and consumption stage[s] of decision-making. [B]rand evidence provides ... descriptors of the brand in the form of the brand name, price, servicescape, core service, employee service, self-image congruence and feelings aroused during usage.” These seven elements of service brand evidence are discussed in this section.

As is shown in the last example above, all direct quotations should preferably follow after an introductory sentence or sentence part.

10. If a quotation forms part of a comprehensive argument, the punctuation is part of the argument and a full stop is, therefore, placed outside the brackets or inverted comma.

Example: Visser (1983:12) contends that "... there must be a conclusion for all sentences".

When a sentence in brackets or inverted commas starts with a capital letter, it indicates that the sentence is used independently and, therefore, requires a full stop inside the brackets or inverted comma.

Example: Visser (1983) asserts: "There must be a conclusion for all sentences."

11. **Never** cut and paste information directly from an electronic source, such as a web page, an electronic journal article, or an e-mail message, to an assignment, even if you acknowledge the source. Rather paraphrase the information (i.e., rewrite it in your own words) and include the required citations. **Information pasted directly from an electronic source should be treated as a direct quotation** and is, therefore, subject to the principles mentioned above.

Examples of direct quotations:

Dwyer (1999:195) stated: "We should aim to create associations that are favourable rather than unfavourable."

or

"It was anciently believed that a baby born with teeth already formed would 'bite the world' and was made for villainy." (Smith, 1977:70).

6.2.2 **Secondary or indirect citations: Referring to sources that you have not directly read yourself**

You should, as a general rule, only cite sources in the text and in the list of references that you have read directly (i.e., sources that you have read yourself and from which you have directly taken information). However, it is sometimes necessary to use secondary (or indirect) citations to sources that you have not read yourself.

Consider the following example:

Brown (in Jones & Thomas, 2000:34) argues that relationship marketing initiatives can improve customer retention and, in this way, increase a firm's profitability.

This sentence refers to a specific argument of Brown. The citation used here indicates that the student did not consult the source by Brown (i.e., the primary source) directly. Instead, she read an article by Jones and Thomas (i.e., a secondary source) in which Brown's arguments were summarised. In such a situation, one has to acknowledge both the primary and the secondary sources by using an indirect citation.

You should use the same basic approach whenever you need to refer to a primary source that you have not read directly, but that is mentioned by the authors of a source that you have consulted.

The following convention is used in such cases:

Brown (in Jones & Carter, 2000:34) argues that ...

or

According to Freud (quoted by Williams, 1996:10), dreams are ...

or

Relationship marketing initiatives can improve customer retention and, thus, increase a firm's profitability (Brown in Jones & Carter, 2000:34).

Only the secondary sources that one has directly read/consulted are included in the list of references.

IMPORTANT: Limit the use of secondary citations to a minimum. Always try to find the primary (original) source before using secondary citations. As a general rule, secondary citations are only acceptable when:

- the primary (original) source is not available electronically or in South Africa and cannot be obtained through an inter-library loan from an overseas library at a reasonable cost and in a reasonable period of time;
- the original author's specific arguments, definitions, or explanations, or a direct quotation from the original author as presented in the secondary source, are very important for your study; AND
- you want to highlight/accentuate the original author's identity in your writing.

Consider the following example:

The following paragraph appeared in an article by Duman and Mattilla (2005:313):

"Most human behavior is intrinsically pleasure-seeking (Holbrook & Hirschman, 1982), and consumers typically desire a feeling of pleasure from a service experience (Carbone & Haeckel, 1994). The hedonic consumption paradigm suggests that in many situations consumers seek "fun, amusement, fantasy, arousal, sensory stimulation and enjoyment" (Holbrook & Hirschman, 1982). Holbrook and Hirschman further argue that the level of hedonic responses varies across product categories. For example, compared to the consumption of consumer durables (e.g., automobiles), the consumption of aesthetic products such as performing arts is more likely to elicit emotional responses. Similarly, hedonic behavior is an integral part of leisure experiences (Hightower et al., 2002). Enjoyment, pleasure and relaxation are common terms used to define leisure experiences (Mannell & Kleiber, 1997). In Petrick's (2003) study, emotional responses (i.e., how a service makes one feel) were directly linked to perceived value associated with the cruise experience. Accordingly, we propose that hedonic benefits should be among the main drivers of the perceived satisfaction and value of cruise vacation experiences".

A student took information from the aforementioned paragraph and constructed the two paragraphs shown below. Note the use of primary and secondary citations in the following two paragraphs:

Refers to a direct quotation of a specific definition of hedonic benefits by Holbrook and Hirschman.

Leisure services, such as cruise liners and the performing arts, provide hedonic benefits (Duman & Matilla, 2005:313) which allow consumers to experience feelings of "... fun, amusement, fantasy, arousal, sensory stimulation and enjoyment" (Holbrook & Hirschman in Duman & Matilla, 2005:313). Holbrook and Hirschman (in Duman & Matilla, 2005:313) have, however, argued that the level of hedonic benefits and the associated emotional responses they elicit vary across product categories. The same should also be the case in the context of leisure services.

Refers to a specific argument by Holbrook and Hirschman. The writer wanted to accentuate the identities of Holbrook and Hirschman.

Previous research has found a direct positive relationship between these pleasurable emotional responses and consumers' perceptions of value in the context of cruise line vacations (Duman & Matilla, 2005:313). It is logical to expect that same direct relationship between positive emotional responses and perceived value will also occur in the context of a theme park, although the strength of this relationship may differ. The following hypothesis is, therefore, stated:

H₂: Visitors' perceptions of the hedonic benefits involved in the theme park experience will be positively correlated with their value perceptions.

As you can see, in the first instance, the student used a secondary citation to Holbrook and Hirschman's definition of hedonic benefits as quoted directly in the article by Duman and Matilla (2005). In the second instance, the student used a secondary citation to accentuate Holbrook and Hirschman's identity when referring to their specific argument.

In the list of references, the student only included the source by Duman and Matilla (2005) as this is the source that she consulted directly. The primary source of Holbrook and Hirschman was not included in the list of references because the student did not read this source directly.

While the use of secondary citations is appropriate in the aforementioned example, it would have been better for the student to read and cite the source by Holbrook and Hirschman directly.

Key points:

1. Use indirect (secondary) citations sparingly. First try to find and cite the original source before opting for an indirect citation.
2. Use indirect citations only when a) the original source is not available, b) the original author's specific definitions, arguments, explanations or a direct quotation from the original source is very important for your discussion, and c) you need to highlight the original author's identify in your writing.
3. With indirect citations, only the secondary sources – the sources that you have read yourself – are listed in the list of references.
4. Students often overdo indirect citations. Consult your study leader if you are unsure.

Question: I have written a paragraph based on information taken from an academic article which I have read. Should I use indirect citations to all the sources cited in this article or should I only cite the article that I have read directly?

Answer: As a general rule, you should cite the article that you have read and on which the paragraph is based directly. Only use indirect citations to the sources cited in this article if:

- a) You need to repeat a direct quotation from one of the sources cited in the article you have read and the original source being quoted directly is not available to you; or
- b) You wish to discuss the specific arguments or explanations of one of the sources cited in this article and the original source containing the specific arguments or explanations is not available to you.

6.2.3 Citations to more than one source

It is usually not necessary to cite more than one source to support a specific factual statement made in an academic document. However, if one wishes to indicate that **several** sources have made the same point or have reached the same conclusion, then multiple sources may be cited. When citing multiple sources, the sources appear in a single set of round brackets and are ordered as they appear in the list of references – alphabetically based on the surname of the first author and then by date. Separate the different sources with a semicolon (;).

Example: Several studies have found a relationship between ... (Chan, 1997:13; Johnston & Abratt, 1995:200; Stace, Zimmer & Dunphy, 1990:117).

In the aforementioned example, the writer referred to three sources to substantiate her statement that “several studies” have found a specific relationship between specific constructs. Given that the author specifically referred to “several studies”, a single citation, or even a citation to two sources, would have been inappropriate.

Note that the authors of a specific source (such as Johnston and Abratt) are never placed in alphabetical order, but remain in the order in which their surnames appear in the source. It is only when you have references to multiple sources, as is the case in the abovementioned example, that the **sources** (not the individual authors) are arranged in the same order in which they would appear in the list of references.

To improve the readability of an academic document, it is best to place multiple citations in round brackets at the end of a sentence or paragraph and not to list multiple sources as part of a sentence.

 Wrong: Several authors, including Creswell (2016:3), Saunders, Lewis and Thornhill (2016:14) and Wagner, Kawulich and Garner (2012:23), accentuate the importance of ethical considerations in the planning of a research study.

 Correct: Several authors accentuate the importance of ethical considerations in the planning of a research study (Creswell, 2016:3; Saunders, Lewis & Thornhill, 2016:14; Wagner, Kawulich & Garner, 2012:23).

Key points:

1. Use multiple citations to indicate that a sentence or paragraph is based on more than one source.
2. Use multiple citations to three or more sources to support statements that several or many studies have investigated or found something specific.
3. Multiple citations are placed in the same set of round brackets.
4. Multiple citations in the same set of round brackets are separated by semi-colons.
5. The cited sources that appear together in the same set of round brackets should be arranged in the same order in which they appear in the list of references; **not** chronologically based on their publication dates.
6. Never change the order in which the authors of a specific source is listed on the source.

6.2.4 Citing two or more publications by the same author(s) published in the same year

When citing more than one source by the same author(s) published in the same year, one has to distinguish between the different sources by putting an a, b or c after the date. In the list of references, the different sources are arranged alphabetically according to their titles.

Citation:	Dwyer (1999a:195) suggests that ..., while Dwyer (1999b:176) points out that ... or Communicators should always create associations that are favourable rather than unfavourable (Dwyer, 1999a:195).
List of References:	Dwyer, J. 1999a. <i>Communication in business: strategies and techniques</i> . Sydney: Prentice Hall. Dwyer, J. 1999b. <i>Introduction to organizational communication</i> . Sydney: Prentice Hall.

EndNote will automatically add a, b or c after the publication date when you cite multiple sources by the same author(s) published in the same year.

7 GENERAL PRINCIPLES: THE LIST OF REFERENCES

Keep the following general principles in mind when preparing the list of references:

1. All the sources cited in the main body of an academic assignment must be listed in the list of references and *vice versa*. Always double-check that all the sources cited in the main body of an assignment are included in the list of references and *vice versa*.
2. The list of references only contains details of the sources that have been cited in the text. Sources that were consulted or read, but that have not been cited in the text, are not included in the list of references.

3. Start the list of references on a separate page at the end of an academic document after the conclusion, but before any appendices.
4. The list of references should have a numbered, first-level heading in UPPERCASE and **bold**. For example: **4. LIST OF REFERENCES**
5. The term “Bibliography” may not be used as a heading for the list of references, as this term refers to all possible sources of information that have even been published on a specific topic. Note that the EndNote reference management software refers to the list of references it inserts at the end of a document as a “Bibliography”. Technically this word choice is not correct. It should be called a list of references.
6. Leave a single, blank line open after the heading and before the first entry in the list of references.
7. In the case of secondary citations (see Section 6.2.2, p. 16), only the sources that were read (i.e., the secondary sources that you have physically taken information from) are included in the list of references.
8. Enough information should be provided in the list of references to enable the reader to find the exact sources cited in the text. See Section 8 for details.
9. The entries in the list of references should be arranged alphabetically according to the first author’s surname.
10. Where multiple sources have the same first author, sort the sources alphabetically by second or later authors, then chronologically from oldest to most recent based on the publication date and then alphabetically by their titles.
11. Do not create a separate list of references for different types of publications (e.g., for books, journals and Internet sources). All sources should be listed together in a single list of references with no sub-sections.
12. Do not use numbering, bullets or hanging indentation in the list of references.
13. If more than one publication of the same author(s) are used *and* these publications have been published in the same year, arrange them in alphabetical order according to their titles (see Section 6.2.3). These publications are then numbered by adding a letter of the alphabet to the date, for example:
 Foxall, G.R. 1984a. Consumers’ intentions and behaviours. *Journal of the Market Research Society*, 26(1):71-92.
 Foxall, G.R. 1984b. Evidence for attitudinal-behavioural consistency: implications for consumer research paradigms. *Journal of Economic Psychology*, 5(4):71-92.
14. Leave a single, blank line open between the entries in the list of references to prevent a squashed-in appearance.
15. All entries in the list of references should be justified (i.e., aligned evenly to form a block with straight margins on both the left and right-hand sides of the page). In MS Word, use the  icon in the “Paragraph” group of the “Home” tab to justify entries in the list of references.
16. Where spaces are included in entries in the list of references, these are always **single** spaces. These single spaces may appear larger when the text is justified. The shaded spaces in the example below are all single spaces although some may appear larger than others because the text is justified:
 Foxall, G.R. 1984. Evidence for attitudinal-behavioural consistency: implications for consumer research paradigms. *Journal of Economic Psychology*, 5(4):71-92.

17. Each entry in the list of references should have a full stop at the end.
18. Add the following information to all entries to sources that you have accessed or downloaded from the Internet: [Online] Available from: URL [Accessed: YYYY-MM-DD]. For examples, see the different Internet-based sources listed in Table 3 on p. 25
19. The checklist in Table 2 below summarises some of the most important formatting requirements for the list of references.

Table 2: Checklist for the list of references

Location:	On a separate page after the conclusion and before any appendices.
Heading:	“LIST OF REFERENCES” formatted as a numbered first-level heading. Do not use the heading “BIBLIOGRAPHY”. Leave a blank line open after the heading and before the first entry.
Line spacing:	1.5 line spacing.
Spacing between entries:	Leave a single, blank line open between entries.
Alignment of entries:	All entries should be justified. Use the  icon on the “Home” tab in MS Word to justify and entry.
Order of entries:	Alphabetically based on first author’s surname.
Other:	End each entry with a full stop.
Do not:	Do not number entries, use bullets or using hanging indentation. Do not arrange sources by source type.

20. If a book or other source was obtained from the UP Library, then most of the information you need to create an entry in the list of references should be available on the Library’s electronic catalogue at <http://explore.up.ac.za>. You can use the catalogue to *inter alia* search for a source by title, author or ISBN number. Carefully read the information provided on the results screen. See the example on the next page.



Author Name **Saunders, Mark, 1959-**
 Title **Research methods for business students / Mark Saunders, Philip Lewis, Adrian Thornhill.**
 Publisher Harlow, England ; New York : Pearson, 2012.
 Edition 6th ed.
 Rating ★★★★★

Surname, first name and year of birth of first author. The date shown here is not the publication date, but the first author's date of birth.

Source title and names of all authors.

Place(s) of publication, publisher and year of publication. Use the first place of publication if multiple places are listed.

Edition.

Copies

LOCATION	CALL NO	STATUS
Mamelodi Open Shelves	MAM 650.072 SAUNDERS	IN
Ref Coll Level 2	N 658 RESEARCH SAUNDERS	IN



Add Author **Lewis, Philip, 1945- Thornhill, Adrian.**
 Phys Descr xxxi, 696 p. : col. ill. ; 27 cm.
 Notes Includes bibliographical references and index.
 Contents Business and management research, reflective the research topic -- Critically reviewing the literature -- Formulating the research design -- Negotiating access and research ethics -- Selecting samples -- Using secondary data -- Collecting primary data through observation -- Collecting primary data using semi-structured, in-depth and group interviews -- Collecting primary data using questionnaires -- Analysing quantitative data -- Analysing qualitative data -- Writing and presenting your project report.
 Summary This is a comprehensive introduction to research methods in business for students planning or undertaking a dissertation or extensive research project in business and management.
 Subject **Business -- Research.**
Business -- Research -- Data processing.
 ISBN 0273750755 (pbk.)
 9780273750758 (pbk.)

Surnames and first names of **second** and later authors not listed under "Author Name" above.

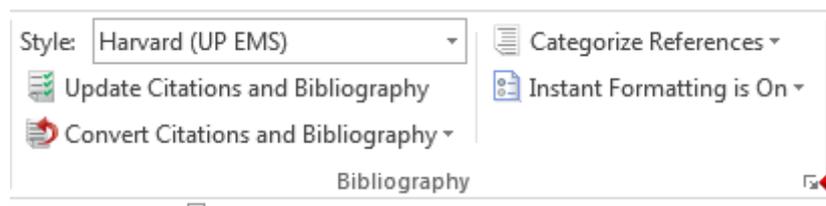
Permanent Link

The book shown above will be cited as follows in a list of references:

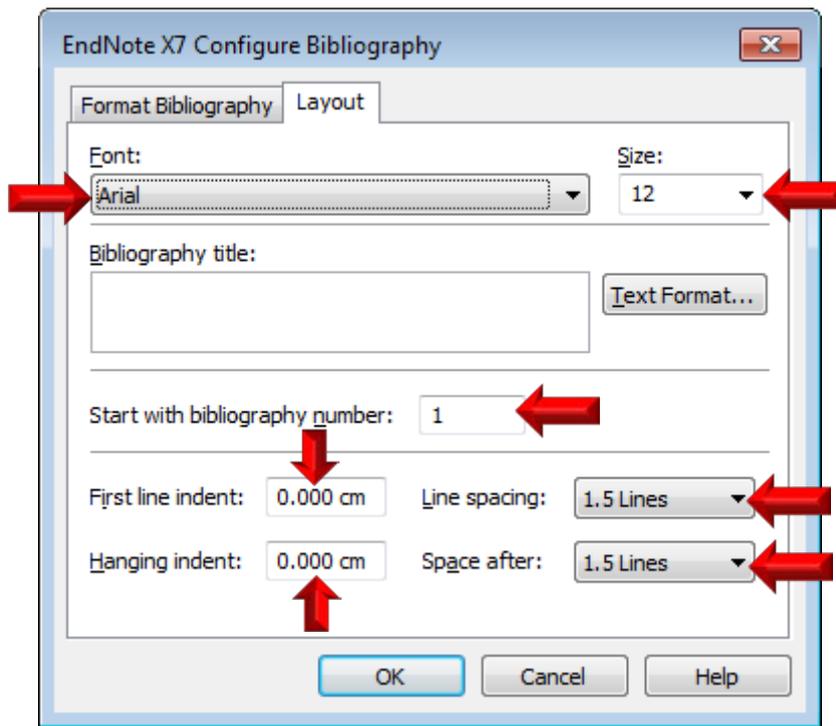
Saunders, M., Lewis, P. & Thornhill, A. 2012. *Research methods for business students*. 6th ed. Harlow, England: Pearson.

21. Do the following to correctly format a list of references created by EndNote:

- i. In MS Word, click inside the EndNote "Bibliography".
- ii. On the "EndNote" tab, choose the drop-down arrow in the bottom right corner of the "Bibliography" group. This will open the "EndNote X7 Configure Bibliography" dialogue box.



- iii. Click on the "Layout" tab of the "EndNote X7 Configure Bibliography" dialogue box and make the changes shown below:



- iv. Click “OK” to close the dialogue box. The EndNote “Bibliography” will now be reformatted to comply with the basic formatting requirements summarised in Point 18 above.

8 REFERRING TO SPECIFIC SOURCE TYPES

The referencing methods used to refer to specific source types are discussed in this section. In some cases, there are different options available for referring to a specific source type. Choose one option and use it consistently throughout your document.

This section also indicates which reference type and fields you should use to correctly cite each specific source type when using EndNote.

NB: Study the referencing approach used for books carefully (see Section 8.1), as many of the basic principles that apply to books also apply to other source types.

Table 3 below lists the different source types in alphabetical order and will guide you to the appropriate sub-section. Study the whole sub-section on a specific source type carefully as there are often special cases to consider.

Table 3: Finding the correct referencing method for a particular source type

Type of source	Sub-section	EndNote reference type for the Harvard (UP EMS) output style
Audio-visual material	8.19, p. 60	Audiovisual material
Bible or other religious texts	8.4, p. 31	Book
Books	8.1, p. 25	Book
Books with chapters by different authors (edited publications)	8.2, p. 29	Book Section Electronic Book Section
Books: electronic Book chapters: electronic	8.3, p. 30	Electronic Book
Conference papers	8.7, p. 39	Conference Paper Proceedings
Court cases	8.12, p. 49	Case
Electronic documents downloaded from the Internet	8.16, p. 56	Report
E-mail messages	8.18.1, p. 59	Not supported
Government publications	8.10, p. 43	Report
Journal articles	8.5, p. 31	Journal Article
Legislation (Acts of Parliament)	8.11, p. 46	Statute
Newspaper articles	8.6, p. 37	Newspaper Article
Online dictionaries and encyclopaedia	8.17, p. 57	Dictionary Encyclopedia
Personal interviews	8.13, p. 52	Not supported
Press releases	8.14, p. 53	Press Release
Study guides, course notes and lectures	8.8, p. 40	Unpublished Work
Theses or dissertations	8.9, p. 42	Thesis
Web pages	8.15, p. 54	Web Page

8.1 BOOKS

8.1.1 Basic format

Citation:	Bruce (2015:195) suggests that ... / According to Bruce (2015:195), ... or Pie charts are used to visually show the frequency of responses to categorical variables (Bruce, 2015:195).
List of References:	Author surname, Initials. Date. <i>Title in sentence case and italics</i> . Edition. Place of publication: Publisher. Bruce, P.C. 2015. <i>Introductory statistics and analytics: a resampling perspective</i> . 2nd ed. Hoboken, NJ: Wiley.

Note the following:

1. The title page verso (i.e., the page following directly after the title page of a book) usually contains information on the date of publication, edition, place of publication, and publisher of a book.

2. The date of publication of a book is usually indicated on the title page verso directly after the copyright sign ©.
3. In the list of references, the edition number (e.g., 2nd ed.) is only shown for the second or later editions of a book. The edition number is omitted for a first edition.
4. In some cases, both edition and impression dates are given. The latter indicates that a specific edition was printed more than once. Always use the edition date, not the impression date.
5. If more than one place of publication is listed then a) use the place of publication included in the publisher's physical or postal address (if given) or b) use the first place of publication in the list.
6. When a book was published in the United States of America, the place of publication is usually indicated as the city in which the book was published followed by the two letter abbreviation of the state in which this city is located. For example: Thousand Oaks, California is indicated as Thousand Oaks, CA, while New York City is indicated as New York, NY.

The official abbreviations for the 52 US states are available here:

<http://pe.usps.gov/text/pub28/28apb.htm> or at www.50states.com/abbreviations.htm

7. The title of the book must be typed in *italics* and end in a full stop.
8. Use sentence case in the title and sub-title of a book. This means that only the first word of the title and all proper nouns (Afr: "eiename") are capitalised. All the other words in the title and sub-title are written in small letters.
9. If the book has a sub-title, then place a colon after the main title followed by the wording of the sub-title in lower case. Only proper nouns in the sub-title should start with a capital letter. For example:

Belcher, W.L. 2009. *Writing your journal article in 12 weeks: a guide to academic publishing success*. Thousand Oaks, CA: Sage.

The word following the colon will normally be in lower case except if it is a proper noun.

10. Where spaces are included in citations (e.g., after the comma and before the date) or in entries in the list of references, these are always single spaces. These single spaces may appear larger when the text is justified.
11. There is a single space after the colon and before the name of the publisher.
12. Remember the full stop at the end of each entry in the list of references.

8.1.2 Special cases

- **Two authors**

Citation:	Gardner and Shelton (1967:74-75) refer to the problem of ... or All procedures must be explained to the patient (Gardner & Shelton, 1967:74-75).
List of References:	Gardner, E.K. & Shelton, B. 1967. <i>The intensive therapy unit and the nurse</i> . London: Farber and Farber.

NB: As indicated in bold above, the word “and” should be used to separate author surnames in citations when the surnames are included as part of the main sentence. The ampersand (&) sign may only be used in place of the word “and” in citations that appear in brackets as well as in the list of references. **This principle applies to all source types.**

- **Three or more authors**

When a book (or any other source) has **three** or more authors, the surnames of all the authors have to be listed in the first citation to that source. In subsequent citations, only the surname of the first author is shown. The surnames of all other authors are replaced with the abbreviation *et al.* Since *et al.* is an abbreviation for the Latin term *et alii*, it must always be typed in italics with a full stop at the end.

Citation:	<p><u>First reference to source:</u> According to Meyer, Anderson, Bohning and Fratanna (1973:74), photosynthesis is ... or Photosynthesis is defined as ... (Meyer, Anderson, Bohning & Fratanna, 1973:74).</p> <p><u>Second or later references:</u> Meyer <i>et al.</i> (1973:74) describe osmosis as ... or Osmosis may be defined as ... (Meyer <i>et al.</i>, 1973:74).</p>
List of References:	Meyer, B.S., Anderson, D.P., Bohning, R.H. & Fratanna, D.G. 1973. <i>Introduction to plant physiology</i> . New York, NY: Van Nostrand.

The verb following after *et al.* must always take the plural form.

The abbreviation *et al.* (typed in *italics* with a full stop at the end) indicates that a source has three or more authors. The verb following the *et al.* must, therefore, always take the plural form. Also see Points 12-16 on pp. 10-11.

- **Including the edition in the list of references**

The first edition of a source is never indicated. Later editions should be indicated and can be abbreviated as follows:

English	Afrikaans
2nd ed.	2de uitg.
3rd ed.	3de uitg.
4th ed.	4de uitg.

List of References:	Cooper, D.R. & Schindler, P.S. 2014. <i>Business research methods</i> . 12th ed. New York, NY: McGraw-Hill.
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Some publishers have international editions that differ from the book edition published in the home country. Since the “home country” and international editions are usually distinguished by the date of publication, it is not necessary to specify that a book was published as an international edition. However, if you want to indicate an international edition, then do the following:

List of References:	Cooper, D.R. & Schindler, P.S. 2008. <i>Business research methods</i> . 10th international ed. New York, NY: McGraw-Hill.
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If multiple impressions (Afr: = “drukke”) of a second or later edition have been published, only the edition is specified. The impression number is never specified.

- **Other special considerations**

- i) When a book is part of a series, the series title and number are included in brackets after the book’s title, for example:
Mol, H. 1985. *The faith of Australians*. (Studies in Society: 25). Sydney: Allen & Unwin.
Strydom, J. 2002. *Distribution management: the place decision*. (New Africa marketing series). Claremont, South Africa: New Africa Books.
- ii) Omit words such as Publishers, Co., Inc., Pty. Ltd., & Sons that are not necessary to identify a publisher.
- iii) If the place of publication is not well known, include the town/city, province and/or country, for example:
Chisnall, P. 2005. *Marketing research*. 7th ed. Maidenhead, Berkshire, UK: McGraw-Hill.

8.1.3 **EndNote fields required for reference type “Book”**

Author: Enter the surnames and initials or surnames and full names of the authors in the format: Surname, Initials (e.g., Smith, Y.B. or Smith, Y B)

Surname, Full names (e.g., Smith, Yvonne Bianca)

The comma after the surname is very important as EndNote uses it to distinguish between the surname and the initials or full names.

Enter each author’s details on a separate line in the “Author” field.

Year: Enter the year of publication in the format YYYY (e.g., 2013).

Title: Enter the book’s title in sentence case (e.g., International handbook of survey methodology).

If the book has a sub-title, then separate the sub-title from the main title with a colon (e.g., Understanding the new statistics: effect sizes, confidence intervals, and meta-analysis). The word following after the colon should start with a lower case letter of the alphabet, except if it is a proper noun.

Place Published: Enter the name of the city, state and country where the book was published here. For example: Chichester, West Sussex, UK

If the book was published in the USA, the country may be omitted and the state may be abbreviated using the US Postal Service abbreviations available at www.50states.com/abbreviations.htm.

For example: Upper Saddle River, NJ or San Francisco, CA

If more than one place of publication is listed, use the first location in the list.

Publisher: Enter the name of the publisher in this field in Title Case. Superfluous words such as Publishers, Publications, Co., Inc., Pty. Ltd., & Sons that are not necessary to identify the publisher may be omitted (e.g., John Wiley instead of John Wiley & Sons).

Edition: If the book is in a second or later edition, then enter the edition number in this field as 2nd, 3rd, 4th, 5th, etc. The 1st edition is never specified. Leave this field blank in the case of a 1st edition.

8.2 BOOKS WITH CHAPTERS BY DIFFERENT AUTHORS (EDITED PUBLICATIONS)

An edited publication refers to a book edited by a single editor or by multiple editors with chapters written by different authors.

Citation:	Cite the author(s) of the specific chapter you are referring to as is shown in Section 8.1 on p. 25. For example, when referring to information taken from the chapter by Weaver mentioned below in a citation, you would cite Weaver (1996:23) in the citation and <u>not</u> the editor (Smith).
List of References:	Weaver, W. 1996. The mathematics of communication. In: Smith, A.G. (ed.) <i>Communication and culture</i> . New York: Holt, Rinehart & Wilston. or Smith, A.R. & Stone, E.C. 1976. The philosophy of manpower planning. In: Bartholomew, D.J. & Samuels, E.S. (eds.) <i>Manpower planning: selected readings</i> . Aylesbury, UK: Hazell, Watson & Viney.

The abbreviation (ed.) is used if the book has a single editor, while the abbreviation (eds.) is used when the book has more than one editor.

If a chapter in an edited publication has **three or more** authors, then use *et al.* in the second or later citations to the source (see Section 8.1.2, p. 26).

8.2.1 EndNote fields required for reference type “Book Section”

Author: Enter the surnames and initials of the authors of the specific **book chapter** in the same way you would enter the authors of a book in the “Author” field (see Section 8.1.3, p. 28).

Year: Enter the year of publication in the format YYYY (e.g., 2013).

Title: Enter the title of the specific **book chapter** in this field in sentence case (e.g., Creating maximum value for the client: developing a new strategic role for market researchers). Only the first word in the title and all proper nouns in the title should start with a capital letter.

Editor: Enter the surnames and initials or surnames and full names of the book’s editor(s) in the format:

Surname, Initials (e.g., Jones, A.B. or Jones, A B)

Surname, Full names (e.g., Jones, Adam Brian)

The comma after the surname is very important as EndNote uses the comma to distinguish between the surname and the initials or full names.

Enter each editor’s details on a separate line.

Book title: Enter the title of the edited **book** in this field in sentence case (e.g., Market research handbook) in the same format as the title of a book.

If the book has a sub-title, then separate the sub-title from the main title with a colon (e.g., Understanding the new statistics: effect sizes, confidence intervals, and meta-analysis). The word following after the colon should start with a lower case letter of the alphabet, except if it is a proper noun.

Place Published: Same as the “Place Published” field of a “Book”.

Publisher: Same as the “Publisher” field of a “Book”.

Edition: Same as the “Edition” field of a “Book”.

8.3 ELECTRONIC BOOKS OR EDITED ELECTRONIC BOOKS WITH CHAPTERS BY DIFFERENT AUTHORS

Citation:	<p>Treated the same as a paper-based book (see Section 8.1) or as an edited publication (see Section 8.2).</p> <p>If the e-book has no page numbers, then the page numbers are omitted: Dwyer (1999) suggests that ... / According to Dwyer (1999), ... or Communicators should always create associations that are favourable rather than unfavourable (Dwyer, 1999).</p>
List of References:	<p>Treated the same as a paper-based book or edited publication, but add the following after the normal information: [Online] Available from: URL [Downloaded: Date accessed]. For example: Jackson, S. 2009. <i>Cult of analytics: driving online marketing strategies using web analytics</i>. Amsterdam: Elsevier/Butterworth-Heinemann. [Online] Available from: http://0-site.ebrary.com.innopac.up.ac.za/lib/pretoria/docDetail.action?docID=10300165 [Accessed: 2010-11-17].</p>

Note the single space after the colon and before the date.

Note the following:

1. One can nowadays read e-books online or download e-books as PDF, epub or djvu files from online book vendors such as Takealot.com and Amazon.com or from other locations on the Internet. Use the guidelines above to cite all e-books.
2. The URLs included in entries in the list of references should not be hyperlinked. To “deactivate” a hyperlinked URL in MS Word, right click on it and then select “Remove Hyperlink” from the pop-up menu.
3. The date on which the e-book was accessed or downloaded should always be provided numerically in the format YYYY-MM-DD (e.g., 2016-02-01).
4. The word [Online] in square brackets should be typed in sentence case. Note the colon and single space after “Accessed” and before the date on which the source was accessed.

TIP: Sage Research Methods Online (<http://0-srmo.sagepub.com.innopac.up.ac.za>) is an extensive collection of electronic books and other resources on research methodology. You should cite all the books and chapters from edited books on Sage Research Methods Online by following the guidelines in this section. For example:

Ornstein, M. 2013. *A companion to survey research*. London: Sage. [Online] Available from: <http://0-dx.doi.org.innopac.up.ac.za/10.4135/9781473913943> [Accessed: 2015-10-29].

Roulston, K. 2014. Analysing interviews. In: Flick, U. (ed.) *The SAGE handbook of qualitative data analysis*. London: Sage. [Online] Available from: <http://0-dx.doi.org.innopac.up.ac.za/10.4135/9781446282243.n20> [Accessed: 2015-10-29].

8.3.1 EndNote fields required for reference type “Electronic Book” or “Electronic Book Section”

Exactly the same as a “Book” (see Section 8.1.3, p. 28) or “Book Section” (see Section 8.2.1, p. 29) **plus** the following two EndNote fields:

URL: Add the book’s specific URL (web address) in this field.

Date Accessed: Enter the date on which you first accessed the book or book chapter online or on which it was added to your EndNote library in this field in the format YYYY-MM-DD.

8.4 THE BIBLE OR OTHER RELIGIOUS TEXTS

Citation:	The words in Psalm 23:6 “... Goodness and mercy shall follow me” (Bible, 1989) are translated in the New International Version (Bible, 1995) with: “... Goodness and love will follow me”.
List of References:	Bible. 1989. <i>Life application Bible: King James version</i> . Wheaton, Ill: Tyndale. Bible. 1995. <i>The Holy Bible: New International Version</i> . Cape Town: Bible Society of South Africa.

Other religious texts can be referenced in a similar manner.

8.4.1 EndNote reference type

Use the EndNote “Book” reference type (see Section 8.1.3, p. 28).

8.5 JOURNAL ARTICLES

One can cite an academic journal article either as a paper-based (i.e., a hard copy) article or as an electronic article. Use the guidelines below to decide whether to cite a specific article as paper-based or as electronic:

Cite an article as paper-based when ...	Cite an article as electronic when ...
You have read a paper-based (i.e., hard copy) version of the article with page numbers; or	You have read the web page (html) version of a journal article with no page numbers ; or
You have read a <u>PDF version</u> of an article <u>with page numbers</u> which you <u>downloaded from one of the UP Library’s e-journal platforms</u> (see http://www.library.up.ac.za/journals/journalsplatforms.htm). AND The article has already been assigned to a specific volume and issue of the journal and, therefore, has a volume and issue number	You have read a PDF version of the an article with no page numbers ; or
	The article is a pre-publication version ¹ that has been accepted for publication but that has not yet been assigned to a specific volume and issue of the journal; or
	You are not sure whether the article should be cited as paper-based or electronic.

Note:

¹ The different e-journal databases use different names to refer to the pre-publication versions of articles. These names include “Earlycite” in Emerald; “OnlineFirst” in Sage; “In Press” in ScienceDirect; “Online First” in Springerlink; and “Early View” in Wiley Online Library.

8.5.1 Paper-based journal articles

Use the guidelines in this section to cite paper-based journal articles or the PDF versions of journal articles with page numbers that you have downloaded from one of the UP Library's e-journal platforms (see <http://www.library.up.ac.za/journals/journalsplatforms.htm>).

8.5.1.1 Basic format

Citation:	Rabbi (1995:52) points out that ... or Previous research indicates that more than half of first year students ... (Rabbi, 1995:52).
List of References:	<p>Surname of author, Initials of author. Year of publication. Title of journal article in sentence case. <i>Title of Journal in Title Case</i>, Volume(Issue):Page numbers of article.</p> <p>There is no space here. ↗</p> <p>Note full stop here. ↗</p> <p>Note full stop here. ↗</p> <p>Note comma here. ↗</p> <p>Rabbi, J.S. 1995. Drinking among college students. <i>Journal of Alcohol and Drug Education</i>, 40(3):52-64.</p>

Note the following:

1. Use sentence case for the title of the article. This means that only the first word of the title and any proper nouns (Afr: "eiename") are capitalised. All the other words in the title are written in small letters.
2. If the article has a two-part title or sub-title, use a colon to separate the two title parts. For example:
Sackett, P.R., Laczó, R.M. & Arvey, R.D. 2002. The effects of range restriction on estimates of criterion interrater reliability: implications for validation research. *Personnel Psychology*, 55(4):807-825.
3. The word following after the colon in a sub-title should start with a lower case letter, except if it is a proper noun (see the example above).
4. Use Title Case and italics for the name of the journal. Title case means that all the major words in the name of the journal are typed in capital letters. Minor words, such as 'in', 'of', 'and', 'the', or 'an', are not capitalised. For example: *Journal of the Academy of Marketing Science*,
5. There are no spaces between the volume, issue, colon and page numbers. See the example in Point 2 above.
6. Where spaces are included in citations (e.g., after the comma and before the date) or in entries in the list of references, these are always **single** spaces. These single spaces may appear larger when the text is justified.
7. The easiest way to find the full bibliographic information for a journal article is to:
 - search for the **article title** on Google Scholar via the following link: <http://0-scholar.google.co.za.innopac.up.ac.za> (select the SFX@UP option to the right of the article URL if the article is found);

- search for the **name of the specific journal** in which the article was published via the “Find e-Journals – Off Campus” search box on the UP Library’s home page: <http://www.library.up.ac.za/index.htm>

8.5.1.2 Special cases

- **Two authors**

Citation:	North and De Vos (2002:33) list a number of advantages of conjoint analysis ... or One of the major advantages of conjoint analysis is its ability to present respondents with realistic choice tasks (North & De Vos, 2002:33).
List of References:	North, E.J. & De Vos, R. 2002. The use of conjoint analysis to determine consumer buying preferences: a literature review. <i>Journal of Family Ecology and Consumer Sciences</i> , 30(1):32-39.

As shown in bold above, the word “and” is used in full sentences, while the ampersand sign (&) is used in citations that appear in brackets as well as in the list of references.

- **Three or more authors**

When there are **three** or more authors, all the authors have to be cited in the text the first time when the specific reference is used. Thereafter, the abbreviation *et al.* (typed in *italics* with a full stop at the end) is used in the text.

Citation:	<p><u>First reference to source:</u> Bohlen, Schlegelmilch and Diamantopoulos (1993:417) define consumer ecological concern as ... or Consumer ecological concern has three components, namely knowledge about environmental issues, attitudes about the environment and environmentally sensitive behaviour (Bohlen, Schlegelmilch & Diamantopoulos, 1993:417).</p> <p><u>Later references:</u> Bohlen <i>et al.</i> (1993:416) argue<u>e</u> that ... or Environmental consciousness is more than a passing fad (Bohlen <i>et al.</i>, 1993:416).</p>
List of References:	Bohlen, G., Schlegelmilch, B.B. & Diamantopoulos, A. 1993. Measuring ecological concern: a multi-construct perspective. <i>Journal of Business Management</i> , 9(1):415-430.

The verb following after *et al.* should always take the **plural** form.

The abbreviation *et al.* (typed in *italics* with a full stop at the end) indicates that a source has multiple authors. The verb following the *et al.* must, therefore, always take the plural form.

▪ **When the volume and/or issue number is unknown**

Every effort should be made to provide complete references to journal articles which include both the volume and issue numbers. However, sometimes the volume and/or issue numbers are unknown. In such cases, the article should be cited as follows in the list of references:

Volume known, issue unknown	Bohlen, G., Schlegelmilch, B.B. & Diamantopoulos, A. 1993. Measuring ecological concern: a multi-construct perspective. <i>Journal of Business Management</i> , 9:415-430.
	The issue numbers of articles downloaded from the ScienceDirect e-journal platform typically do not include the issue number; only the volume number.
Volume and month known, issue unknown	Bohlen, G., Schlegelmilch, B.B. & Diamantopoulos, A. 1993. Measuring ecological concern: a multi-construct perspective. <i>Journal of Business Management</i> , 9(March):415-430.
Month known, volume and issue unknown	Bohlen, G., Schlegelmilch, B.B. & Diamantopoulos, A. 1993. Measuring ecological concern: a multi-construct perspective. <i>Journal of Business Management</i> , (March):415-430.
Only issue number known	Bohlen, G., Schlegelmilch, B.B. & Diamantopoulos, A. 1993. Measuring ecological concern: a multi-construct perspective. <i>Journal of Business Management</i> , (1):415-430.
Both volume and issue numbers are unknown.	Double-check the e-journal platform from which the article was downloaded or search for the article on Google Scholar. If the article has no volume and issue numbers, then cite it as an electronic journal article. Never use the article's year of publication (e.g., 2015) in place of the volume and/or issue number.

8.5.2 Electronic journal articles

Cite a journal article as an electronic article when:

- You have read the web page (.html) version of the article with no page numbers;
- You have read the PDF version of the article with no page numbers;
- The article is a pre-publication version that has not yet been assigned to a specific volume or issue of the journal; or
- You are not sure whether to cite the article as paper-based or electronic.

Citation:	<p>Articles viewed as web pages in .html format:</p> <p>When an electronic journal article is printed or viewed in .html format, the number of pages will differ depending on the page set-up and font size used when the article is printed. As a result, page numbers are <u>not</u> included in citations.</p> <p>For example: Johnston (2002) argues that ...</p> <p>Articles downloaded in .pdf format with no page numbers:</p> <p>Because no page numbers are available, these are omitted from citations.</p> <p>For example: Johnston (2002) argues that ...</p>
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List of References: (article viewed in .html / .pdf format with no page numbers)	Coviello, N.E., Brodie, R.J. & Munro, H.J. 1997. Understanding contemporary marketing: development of a classification scheme. <i>Journal of Business Management</i> , 13(6). [Online] Available from: http://0-search.ebscohost.com.innopac.up.ac.za/login.aspx?direct=true&db=bth&AN=4967161&site=ehost-live&scope=site [Accessed: 2015-10-28].
List of References: (Pre-publication version)	Rey-Martí, A., Ribeiro-Soriano, D. & Palacios-Marqués, D. A bibliometric analysis of social entrepreneurship. <i>Journal of Business Research</i> , (In press):1-10 [Online] Available from: http://dx.doi.org/10.1016/j.jbusres.2015.10.033 [Accessed: 2015-10-28]. Or Rey-Martí, A., Ribeiro-Soriano, D. & Palacios-Marqués, D. A bibliometric analysis of social entrepreneurship. <i>Journal of Business Research</i> , (In press). [Online] Available from: http://www.sciencedirect.com/science/article/pii/S0148296315004567 [Accessed: 2015-10-28].

Note the following:

1. Always try to get the PDF version of an online article with page numbers where available. The PDF version is usually an exact replica of the article as it was printed in the paper-based version of the journal with all the figures, tables and mathematical formulae included. In some cases, articles in .html-format are incomplete and do not include all the figures, tables and formulae.
2. Some e-journal platforms, such as Emerald, Sage, ScienceDirect, SpringerLink and Wiley Online Library, publish pre-publications versions of journal articles. These pre-publication versions have been accepted for publication, but have not yet been assigned to a specific volume and issue of the particular journal. In some cases, these pre-publication articles have already been typeset in the format of the journal, while in other cases, the articles are simply PDF versions of Word documents. If you have cited such a pre-publication version, then you have to add (In press) after the journal name in the list of references. If the PDF version of a pre-publication article contains page numbers, then these may be included in citations and in the list of references, else the page numbers are omitted. See the examples above.
3. When referring to an electronic journal article, one should indicate the specific URL (web address) from which it was accessed. The URL should ideally refer to the unique URL of the specific article. Where an article-specific URL is not available or where the article-specific URL is very long, one can use the article's unique Digital Object Identifier (DOI) number to create a shorter URL. Such a URL will consist of: <http://0-dx.doi.org.innopac.up.ac.za/> and the article's DOI number (e.g., 10.1016/j.bbr.2011.03.031)
The aforementioned article's URL would, therefore, be:
<http://0-dx.doi.org.innopac.up.ac.za/10.1016/j.bbr.2011.03.031>
An article's DOI number is usually indicated on the web page showing the article's abstract or on the first page of the article's PDF version.
4. The URLs included in entries in the list of references should not be hyperlinked. In other words, these URLs are not highlighted in blue and one cannot click on a URL to connect to the specific web page. To "deactivate" a hyperlinked URL in MS Word, right click on it and then select "Remove Hyperlink" from the pop-up menu.

5. Sometimes the URLs of electronic journal articles are very long and lead to awkward-looking entries with lots of unnecessary white space when the text is justified. For example:

Hudson, S., Hudson, P. & Miller, G.A. 2004. The measurement of service quality in the tour operating sector: a methodological comparison. *Journal of Travel Research*, 42(3):305-312. [Online] Available from: EbscoHost: Academic Search Premier: <http://0-search.epnet.com.innopac.up.ac.za:80/login.aspx?direct=true&db=aph&an=12216933> [Accessed: 2005-01-24].

Do the following to deal with this problem:

- Make sure that the problematic entry in the list of references is justified. To check, select the specific entry and then click on the “Justify” icon () in the “Paragraph” group of the “Home” tab in MS Word.
- Change the font type of the URL to Arial Narrow and the font size of the URL in the entry to 11 pt. The rest of the text should remain in Arial 12 pt. font.
- Choose a natural break point (such as :, /, = or &) towards the end of the URL. Place the MS Word insertion point (cursor) at this break point and simultaneously press the Shift and Enter buttons on the keyboard to insert a “soft line” break. The text of the URL will move back to fill the preceding white space. You may have to experiment by placing the “soft line” break at different positions in the URL until you find an optimal break point to remove most of the unnecessary white space.

8.5.3 EndNote options for journal articles

Use the “Journal Article” and “Electronic Article” reference types in EndNote to refer to paper-based and online journal articles respectively. Complete the following fields:

Author: Same as the “Author” field of a “Book” (see Section 8.1.3, p. 28).

Year: Enter the year of publication in the format YYYY (e.g., 2013).

Title: Enter the article’s title in this field in sentence case (e.g., The use of exploratory factor analysis in psychological research). Only the first word of the title and all proper nouns therein should start with a capital letter.

If the article has a sub-title, use a colon to separate the main title and the sub-title. The word following after the colon should start with a lower case letter except if it is a proper noun.

Journal: Enter the name of the journal in Title Case. All major words in the journal name should start with a capital letter (e.g., European Journal of Marketing).

Volume: Enter the volume in numeric format (e.g., 3). Leave this field blank if no volume number is available.

Issue: Enter the issue number in numeric format (e.g., 1). Leave this field blank if no issue number is available.

If the article is a pre-publication version that has not yet been allocated to a specific volume and issue of the journal, add the words “In press” (without the quotation marks) to this field.

Pages: Enter the start and end pages numbers of the article as a page range (e.g., 108-120). There should be no blank spaces before or after the hyphen (-) in the page range.

Leave this field blank if the article was viewed in .html format or has no page numbers.

Optional, recommended fields for electronic journal articles:

Abstract: Copy and paste the text of the article's abstract into this field. This will enhance your ability to search an EndNote library for articles on a specific topic.

DOI: If you downloaded the article from an electronic journal platform/database, add the article's Digital Object Identifier (DOI) number in this field (e.g., 10.1152/advan.00062.2009). EndNote will use this information to generate a web-link to the article which is often shorter than the article's direct URL. This field should only contain the article's DOI number and not the prefix *http://dx.doi.org/*. Delete the prefix if it is included.

URL: If you downloaded the article from the Internet, add the article's specific URL (web address) in this field.

Date Accessed: Enter the date on which you first accessed/downloaded the article or on which it was first added to your EndNote library in this field in the format YYYY-MM-DD (e.g., 2015-10-29).

8.6 NEWSPAPER ARTICLES

8.6.1 A paper-based newspaper article where the author is named

Citation:	Same as a journal article (see Section 8.5).
List of References:	Peterson, C. 1987. Falklanders fear weakening of UK resolve. <i>Pretoria News</i> , 21 January:12. Buys, W. 1987. Motorversekering: polishouers nou voor twee keuses gestel. <i>Sake-Beeld</i> , 26 January:4-5.

There should be no space after the colon and before the page numbers.

8.6.2 An anonymous newspaper article

Three options are available:

Option 1: Use the name of the newspaper in the place of the author.

Citation:	E-mail is society's new time waster (<i>Business Day</i> , 2000:17).
List of References:	<i>Business Day</i> . 2000. E-mail is society's new time waster. <i>Business Day</i> , 15 January:17.

Option 2: Use the title of the article in the place of the author.

Citation:	Research indicates that e-mail is reducing worker productivity (E-mail is society's new time waster, 2000:17).
List of References:	E-mail is society's new time waster. 2000. <i>Business Day</i> , 15 January:17.

Option 3: Use the term "Anon." (without the inverted commas) in the place of the author.

Citation:	E-mail is society's new time waster (Anon., 2000:17).
List of References:	Anon. 2000. E-mail is society's new time waster. <i>Business Day</i> , 15 January:17.

Choose one of these options and use it consistently in your document. Option 1 is usually the best.

8.6.3 An online newspaper article

Citation:	The in-text citation approaches outlined in Sections 8.6.1 and 8.6.2 may be used, but <u>no page numbers</u> are included. According to Musgrave (2008), ... or The Government recently published a 15 year review in which several structural issues affecting development were highlighted (Musgrave, 2008).
List of References:	Combine the approaches outlined in Sections 8.6.1 and 8.6.2 above with the following: [Online] Available from: URL [Accessed: Date accessed]. Musgrave, A. 2008. SA will prosper by curing its structural ills, says review. <i>Business Day</i> , 7 October. [Online] Available from: http://www.businessday.co.za/articles/national.aspx?ID=BD4A857698 [Accessed: 2008-10-07].

Because electronic newspaper articles typically do not contain page numbers, no page numbers are included in citations and in the list of references.

8.6.4 EndNote fields required for the reference type “Newspaper Article”

Reporter: Same as the “Author” field of a “Book” (see Section 8.1.3, p. 28).

Year: Enter the year in which the article was published in the format YYYY (e.g., 2014).

Title: Enter the title of the newspaper article in sentence case.

Newspaper: Enter the name of the newspaper in Title Case (e.g., New York Times).

Pages: Enter the start and end pages of the article as a page range (e.g., 14-17). There should be no blank spaces before or after the hyphen (-) in the page range. Leave this field blank if no page numbers are specified.

Issue date: Enter the date on which the newspaper article was published in this field as a numeric day and a month in words (e.g., 12 June). Omit the year from this field.

Additional fields required for online newspaper articles:

URL: If you downloaded the newspaper article from the Internet, add the article’s specific URL (web address) in this field.

Access Date: Enter the date on which you first accessed the newspaper article on the Internet or on which it was added to you EndNote library in this field in the format: YYYY-MM-DD (e.g., 2013-12-11).

8.7 CONFERENCE PAPERS

Citation:	<p>Use the same approach used in the case of a paper-based journal article (see Section 8.5.1.1).</p> <p>According to Kritzinger and Du Plessis (2001:110), a general lack of strategic approaches exists among organisations that embrace the Internet as a marketing tool.</p>
List of References:	<p>Hard copy conference papers:</p> <p>Kritzinger, H.L. & Du Plessis, P.J. 2001. <i>An exploratory study of the practice of relationship marketing by South African small-to-micro enterprises using the Internet as an enabler</i>. Paper presented at the Thirteenth Annual Conference of the Southern Africa Institute for Management Scientists, Stellenbosch, 9-11 September:110-120.</p> <p>or</p> <p>Kritzinger, H.L. & Du Plessis, P.J. 2001. An exploratory study of the practice of relationship marketing by South African small-to-micro enterprises using the Internet as an enabler. In: Van den Berg, M. (ed). <i>Proceedings of the Thirteenth Annual Conference of the Southern Africa Institute for Management Scientists</i>, Stellenbosch, 9-11 September:110-120.</p> <p>Electronic conference papers:</p> <p>Combine the approach outlined above with the following: [Online] Available from: URL [Accessed: Date accessed].</p> <p>or</p> <p>Treat the document as an electronic document downloaded from the Internet (see Section 8.16).</p> <p>For example:</p> <p>Elbaz, J. & Batrich, H. 2013. <i>Supply chain management strategies of Moroccan firms: a qualitative study</i>. Paper presented at 2013 International Conference on Advanced Logistics and Transport (ICALT), Sousse, Tunisia, 29-31 May:388-393. [Online] Available from: http://ieeexplore.ieee.org/xpls/abs_all.jsp?arnumber=6568490&tag=1 [Accessed: 2015-11-17].</p>

8.7.1 EndNote fields required for the reference types “Conference Paper” and “Conference Proceedings”

Use the reference type “Conference Paper” for a single paper that was **not** published in a conference proceedings edited by an identifiable editor or editors. Use the reference type “Conference Proceedings” if the paper was published in a conference proceedings edited by an identifiable editor or editors.

➤ **Fields required for the reference type “Conference Paper”:**

Author: Same as the “Author” field of a “Book” (see Section 8.1.3, p. 28).

Year: Enter the year in which the conference took place in the format YYYY (e.g., 2014).

Title: Enter the title of the conference paper in this field in sentence case.

Conference Name: Enter the name of the conference in this field in Title Case (e.g., Thirteenth Annual Conference of the Southern African Institute for Management Scientists)

Conference Location: Enter the name of the city, province/state and country where the conference took place in this field (e.g., Gaborone, Botswana).

Pages: Enter the start and end pages in this field as a page range (e.g., 108-120). There should be no blank spaces before or after the hyphen (-) in the page range.

Date: Add the date(s) on which the conference took place in this field in the format DD Month in words (e.g., 12-14 February). Omit the year from this field.

Additional required fields for conference papers downloaded from the Internet:

URL: If you downloaded the conference paper from the Internet, add the specific URL (web address) from which the paper was downloaded in this field.

Access Date: Enter the date on which you first accessed or downloaded the conference paper from the Internet in this field in the format: YYYY-MM-DD (e.g., 2013-12-11).

Optional, recommended field:

Abstract: Copy and then paste the text of the paper's abstract into this field. This will enhance your ability to search an EndNote library for articles on a specific topic.

➤ **Fields required for the reference type "Conference Proceedings":**

The same as a "Conference Paper" **plus** the following two required fields:

Proceedings Title: If a conference paper was published in a formal conference proceedings which was edited by an identifiable editor or editors, add the title of the conference proceedings in this field in Title Case (e.g., Proceedings of the Thirteenth Annual Conference of the Southern African Institute for Management Scientists).

Editor: Enter the details of the editor(s) of the conference proceedings in this field in the same format as for the "Editor" field of a "Book Section" (see Section 8.2.1, p. 29).

Optional, recommended field:

Abstract: Copy and then paste the text of the article's abstract into this field. This will enhance your ability to search an EndNote library for articles on a specific topic.

8.8 STUDY GUIDES, COURSE NOTES AND LECTURES

- **Author indicated**

Citation:	Same as book (see Section 8.1, p. 25)
List of References:	<p><u>Study guide:</u> Kotzé, T.G. 2015. <i>Study guide for NME 704: Research Methodology</i>. Pretoria: Department of Business Management, University of Pretoria.</p> <p><u>Course notes:</u> Kotzé, T.G. 2015. <i>The "basics" of qualitative thematic analysis</i>. Pretoria: Department of Business Management, University of Pretoria.</p> <p><u>Lectures:</u> Grobler, A.F. 2003. <i>Finding an appropriate research topic: some practical guidelines</i>. Lecture to the EBW 801 class on 2003-03-15.</p>

Note that the names of academic disciplines (e.g., Business Management, Communication Management or Tourism Management) or the names of specific

modules/courses (e.g. Strategic Issues in Marketing or the Marketing of Services) are treated as proper nouns and are, therefore, typed in title case.

- **Author not indicated**

Citation:	A fact can be defined as ... (University of Pretoria, 2015:21).
List of References:	<p><u>Study guide:</u> University of Pretoria. 2015. <i>Study guide for NME 704: Research Methodology</i>. Pretoria: Department of Business Management, University of Pretoria.</p> <p><u>Course notes:</u> University of Pretoria. 2015. <i>The “basics” of qualitative thematic analysis</i>. Pretoria: Department of Business Management, University of Pretoria.</p>

- **Electronic study material**

Citation:	Same as above.
List of References:	<p>Use the following format where study material were obtained from the clickUP system:</p> <p><u>Study guide:</u> University of Pretoria. 2015. <i>Study guide for NME 704: Research Methodology</i>. Pretoria: Department of Business Management, University of Pretoria. [Online] Available from https://clickup.up.ac.za [Accessed: 2015-02-01].</p> <p><u>Course notes:</u> Kotzé, T.G. 2015. <i>The “basics” of qualitative thematic analysis</i>. Pretoria: Department of Business Management, University of Pretoria. [Online] Available from https://clickup.up.ac.za [Accessed: 2015-02-01].</p>

8.8.1 **EndNote fields required for the reference types “Unpublished Work”**

Author: Same as the “Author” field of a “Book” (see Section 8.1.3, p. 28).

Year: Enter the year of publication in the format YYYY (e.g., 2014). Enter n.d. for “Not dated” if no publication date is given, but use this option sparingly.

Title of Work: In the case of an unpublished work, such as a study guide or course notes, enter the title of the source in this field in sentence case. The title of a study guide should be entered in the following format:

Study guide for [Course code]: [Course name]

For example: Study guide for NME 703: Research Methodology

Place Published: Enter the location of the applicable institution where the unpublished work was compiled in this field (e.g., Pretoria).

Institution: In the case of an unpublished work, such as a study guide or course notes, enter the official name of the university at which the unpublished work was compiled in this field in Title Case (e.g., University of Pretoria).

Department: In the case of a study guide or course notes, enter the official name of the relevant academic department in this field in Title Case (e.g., Department of Business Management).

Type of Work: If the unpublished work is a hand-out or set of PowerPoint slides used during a lecture to a group of students, then enter a description of the specific lecture here. For example: Lecture presented to the BEM 815 class on 2014-02-15.

Additional required fields for sources accessed on or downloaded from the Internet:

URL: Include the correct URL of all online sources downloaded from or accessed on the Internet. If the source was downloaded as an electronic file (e.g., a PDF file), then include the URL of the web page from which the file was downloaded in this field and not the URL of the electronic file itself.

If the source was obtained from the clickUP system, then specify the URL as: <https://clickup.up.ac.za>.

Access Date: Add the date on which you first accessed or downloaded the source from the Internet in this field in the format: YYYY-MM-DD (e.g., 2013-12-11).

8.9 THESES AND DISSERTATIONS

Use this reference type for theses, dissertations, research reports and research articles written by postgraduate students.

- ***A paper-based thesis, dissertation or research report***

Citation:	Same as a book (see Section 8.1, p. 25).
List of References:	Smithers, R.H.N. 1970. <i>The mammals of Botswana</i> . Unpublished doctoral thesis. Pretoria: University of Pretoria.

- ***An electronic thesis, dissertation or research report***

Citation:	Same as a book (see Section 8.1, p. 25).
List of References:	Hebst, F.J. 2001. <i>An investigation of the product life cycle concept as an instrument in marketing decision-making for selected small organisations in Africa</i> . Unpublished doctoral thesis. Pretoria: University of Pretoria. [Online] Available from: http://upetd.up.ac.za/thesis/available/etd-06132002-085415 [Accessed: 2004-12-14].

Note the following:

1. List the student as the author of a thesis, dissertation or research report; not the student's supervisor or study leader.
2. Because theses, dissertations and research reports/articles are usually written by individual students, these sources typically have a single author.
3. Use the terms unpublished doctoral thesis, unpublished master's dissertation or unpublished honours research report or research article depending on the specific qualification involved.
4. All theses, dissertations and research reports/articles downloaded from the Internet should be cited as electronic documents. Include the specific URL of the web page from which the document was downloaded as well as the date on which the document was accessed.

8.9.1 EndNote fields required for the reference type “Thesis”

Author: Enter the details of the student who authored the thesis / dissertation in this field in the same format as that of the author of a book (see Section 8.1.3, p. 28).

Year: Enter the year in which the thesis / dissertation was completed in this field in the format YYYY (e.g., 2013).

Title: Enter the title of the thesis / dissertation in this field in sentence case.

Place Published: Enter the location of the tertiary institution at which the thesis / dissertation was completed in this field in Title Case (e.g., Pretoria or New York, NY).

University: Enter the official name of the university at which the thesis/dissertation was completed in this field in Title Case (e.g., University of Pretoria).

Thesis Type: Enter the thesis type in this field. Typical options include PhD thesis, DPhil thesis, DCom thesis, MPhil dissertation or mini-dissertation, MCom dissertation or mini-dissertation, Master’s dissertation or mini-dissertation and Honours dissertation or research report.

Additional required fields for theses / dissertations accessed on or downloaded from the Internet:

URL: Include the correct URL of all online sources downloaded from or accessed on the Internet. If the source was downloaded as an electronic file (e.g., a PDF file), then include the URL of the web page from which the file was downloaded in this field and not the URL of the electronic file itself.

Access Date: Add the date on which you first accessed or downloaded the source from the Internet in this field in the format: YYYY-MM-DD (e.g., 2013-12-11).

8.10 GOVERNMENT PUBLICATIONS AND PUBLICATIONS BY INTERNATIONAL ORGANISATIONS

Note the following:

1. Electronic copies of most publications by the South African government are available at <http://www.gov.za> and at <http://polity.org.za>. Alternatively, see the web site of the relevant government department, council, commission, or international organisation.
2. When a publication by a government department, council, commission or international organisation has an identifiable human author, then indicate this person as the author as you would in the case of a book (see Section 8.1 on p. 25).
3. However, since most publications by government departments, councils, commissions or international organisations usually do not have identifiable human authors, the name of the organisation is typically used as the “author”. For example:
Department of Higher Education and Training. 2014. *Annual report 2013/14*. [Online] Available from: <http://www.dhet.gov.za/Commissions%20Reports/Annual%20Report%202013%20-%20202014.pdf> [Accessed: 2015-11-18].
4. Since most government publications and publications by international organisations, parastatal organisations, councils and commissions do not have identifiable humans as the authors, it is best to place citations to such sources at the end of a sentence or paragraph.

- ✘ Wrong: According to the World Bank (2008:13), debt is an important inhibitor of growth in the developing world.
- ✓ Correct: Debt is an important inhibitor of growth in the developing world (World Bank, 2008:13).

5. Government publications often have reference or series numbers. Include these numbers in round brackets after the title of the publication to enable the reader to easily identify the relevant publication. For example:

South African Reserve Bank. 2015. *Quarterly bulletin – September 2015 (No. 277)*. [Online] Available from: <https://www.resbank.co.za/Publications/Detail-Item-View/Pages/Publications.aspx?sarbweb=3b6aa07d-92ab-441f-b7bf-bb7dfb1bedb4&sarblst=21b5222e-7125-4e55-bb65-56fd3333371e&sarbitem=6883> [Accessed: 2015-11-18].

6. Cite government publications downloaded from the Internet as online publications by adding the URL (web address) of the specific web page from which the publication was downloaded and the date accessed to the reference. See the example above.

8.10.1 Publications by international organisations

Citation:	Debt is an important inhibitor of growth in the developing world (World Bank, 2008:13).
List of References:	<p>Hard copy format:</p> <p>World Bank. 2008. <i>World development report 2008: agriculture for development</i>. Washington: Word Bank.</p> <p>Electronic format:</p> <p>World Bank. 2008. <i>World development report 2008: agriculture for development</i>. [Online] Available from: http://go.worldbank.org/ZJIAOSUFU0 [Accessed: 2008-10-07].</p>

8.10.2 Publications by national and provincial government departments

Citation:	The production of the platinum group of metals remained unchanged (Department of Minerals and Energy Affairs, 1995:14).
List of References:	Department of Mineral and Energy Affairs. 1995. <i>Annual report</i> . Pretoria: Government Printer.
Citation:	Technology can reduce the workload of women (Department of Arts, Culture, Science and Technology, 1996:89).
List of References:	<p>Hard copy format:</p> <p>Department of Arts, Culture, Science and Technology. 1996. <i>White paper on science and technology: preparing for the 21st century</i>. Pretoria: Government Printer.</p> <p>Electronic format:</p> <p>Department of Arts, Culture, Science and Technology. 1996. <i>White paper on science and technology: preparing for the 21st century</i>. [Online] Available from: http://www.dst.gov.za/publications-policies/legislation/white_papers/Science_Technology_White_Paper.pdf/view [Accessed: 2008-10-07].</p>

8.10.3 Publications by parastatal organisations, councils and commissions

Citation:	... (South African Reserve Bank, 2002:23).
List of References:	<p>Hard copy format:</p> <p>South African Reserve Bank. 2002. <i>Quarterly bulletin – September 2002. (No. 225)</i>. Pretoria: South African Reserve Bank.</p> <p>Electronic format:</p> <p>South African Reserve Bank. 2002. <i>Quarterly bulletin – September 2002. (No. 225)</i>. [Online] Available from: http://www.reservebank.co.za [Accessed: 2008-10-07].</p>
Citation:	... (Statistics South Africa, 2002:23).
List of References:	<p>Hard copy format:</p> <p>Statistics South Africa. 2002. <i>Midyear estimates – 2002. Statistical Release P0302</i>. Pretoria: Statistics South Africa.</p> <p>Electronic format:</p> <p>Statistics South Africa. 2002. <i>Midyear estimates – 2002. Statistical Release P0302</i>. [Online] Available from: http://www.statssa.gov.za/publications/statsdownload.asp?PPN=P0302&SCH=790 [Accessed: 2008-10-07].</p>

8.10.4 EndNote fields required for the reference type “Report”

Use the “Report” reference type in EndNote for publications by international organisations, national, provincial or local government structures and for publications by parastatal institutions, councils and commissions.

Author: Same as the “Author” field of a “Book” (see Section 8.1.3, p. 28).

If the author is a government department or other organisation, place a comma after the organisation’s name (e.g., South African Reserve Bank,). If the organisation’s name contains a comma, then enter a double comma in place of this comma and add a comma at the end (e.g., United Nations Educational,, Scientific and Cultural Organization,)

If a source has no identifiable human or organisational author, leave the field blank. EndNote will automatically replace a blank field with “Anon”. However, use this option as a last resort.

Year: Enter the year of publication in the format YYYY (e.g., 2014). Enter n.d. for “Not dated” if no publication date is given, but use this option sparingly.

Title: Enter the title of the document in this field in sentence case.

Place Published: Add the name of the city/town, state/province and country where the report was published in this field (e.g., Pretoria or Washington, DC). In the case of a South African report, only the town/city has to be specified.

Publisher: Enter the name of the specific international organisation, government department, parastatal organisation, council or commission that published the report here.

Additional required fields for reports accessed on or downloaded from the Internet:

URL: Include the correct URL of all online sources downloaded from or accessed on the Internet. If the source was downloaded as an electronic file (e.g., a PDF file), then include the URL of the web page from which the file was downloaded in this field and not the URL of the electronic file itself.

Access Date: Add the date on which you first accessed or downloaded the source from the Internet in this field in the format: YYYY-MM-DD (e.g., 2013-12-11).

8.11 LEGISLATION (ACTS OF PARLIAMENT)

Electronic copies of Acts of Parliament are available on the following web sites:

- www.gov.za
- http://www.polity.org.za/searchadvanced_lb.php

The referencing of Acts of Parliament differ somewhat from that of other sources. Consider the following guidelines:

➤ In-text citations to Acts of Parliament:

Citations to Acts of Parliament will differ depending on whether you will be citing only one Act or several different Acts in the same document:

When only one Act will be cited in the document.	<p><u>1st citation:</u></p> <p>Section 9(1)(a) of the Liquor Act (59/2003) (hereafter referred to as the Act), <i>inter alia</i>, states that ...</p> <p><u>2nd or later citations:</u></p> <p>The Act also requires liquor store owners to ...</p>
When multiple Acts will be cited in the same document.	<p><u>1st citation:</u></p> <p>Section 9(1)(a) of the Liquor Act (59/2003) (hereafter referred to as the Liquor Act), <i>inter alia</i>, states that ...</p> <p><u>2nd or later citations:</u></p> <p>The Liquor Act also requires liquor store owners to ...</p>

➤ Entries in the list of references:

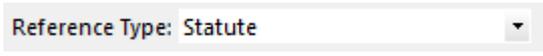
There are two options for citing an Act of Parliament in the list of references, namely a brief option and a detailed option. Consult your study leader to determine which option he/she prefers and then use the selected option consistently:

Brief option:	<p>South Africa. 2003. Liquor Act, No. 59 of 2003.</p> <p>South Africa. 1996. Constitution of the Republic of South Africa, No. 108 of 1996.</p>
Detailed option:	<p>In this option, you need to include the details of the Government Gazette or other source in which the specific Act was published.</p> <p>South Africa. 2004. Liquor Act, No. 59 of 2003. <i>Government Gazette</i>, 466(26294):1-50. [Online] Available from: http://www.info.gov.za/gazette/acts/2003/a59-03.pdf [Accessed: 2005-01-24].</p> <p>South Africa. Income Tax Act, No. 58 of 1962. In: SA Institute of Tax Practitioners. 2010. <i>SAIT compendium of tax legislation 2010</i>. Cape Town: Juta.</p>

8.11.1 EndNote fields required for Acts of Parliament

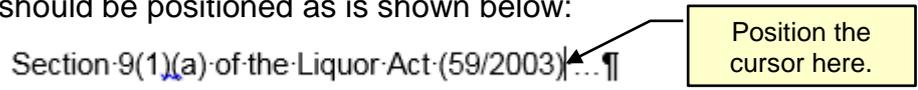
➤ **Add the details of an Act manually to an EndNote library:**

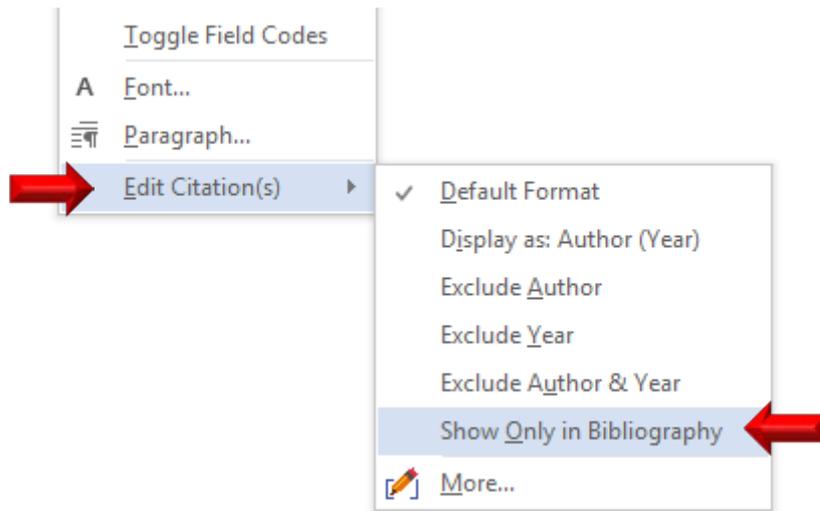
It is somewhat “tricky” to use EndNote to cite Acts of Parliament. Also note that EndNote only supports the brief option mentioned above. Do the following to manually add the bibliographic information of an Act of Parliament to an EndNote Library:

1. Click the “New Reference” icon () on the top icon bar to open a new, blank reference page.
2. Change the “Reference Type” to “Statute”: 
3. Enter the following details in the fields indicated below:
Year: Enter the year in which the Act was promulgated in this field (e.g., 2003).
Name of Act: Enter the official title of the Act here in Title Case (e.g., Liquor Act).
Country: Enter “South Africa” in this field without the quotation marks.
Statute Number: Enter the Act’s number in this field in the format: No. XX of YYYY (e.g., No. 59 of 2003).
4. Press Ctrl and S on the keyboard simultaneously to save the newly created manual entry. Alternatively, choose File, Save from the top menu bar.
5. Close the Reference Window to return to the main EndNote library screen.

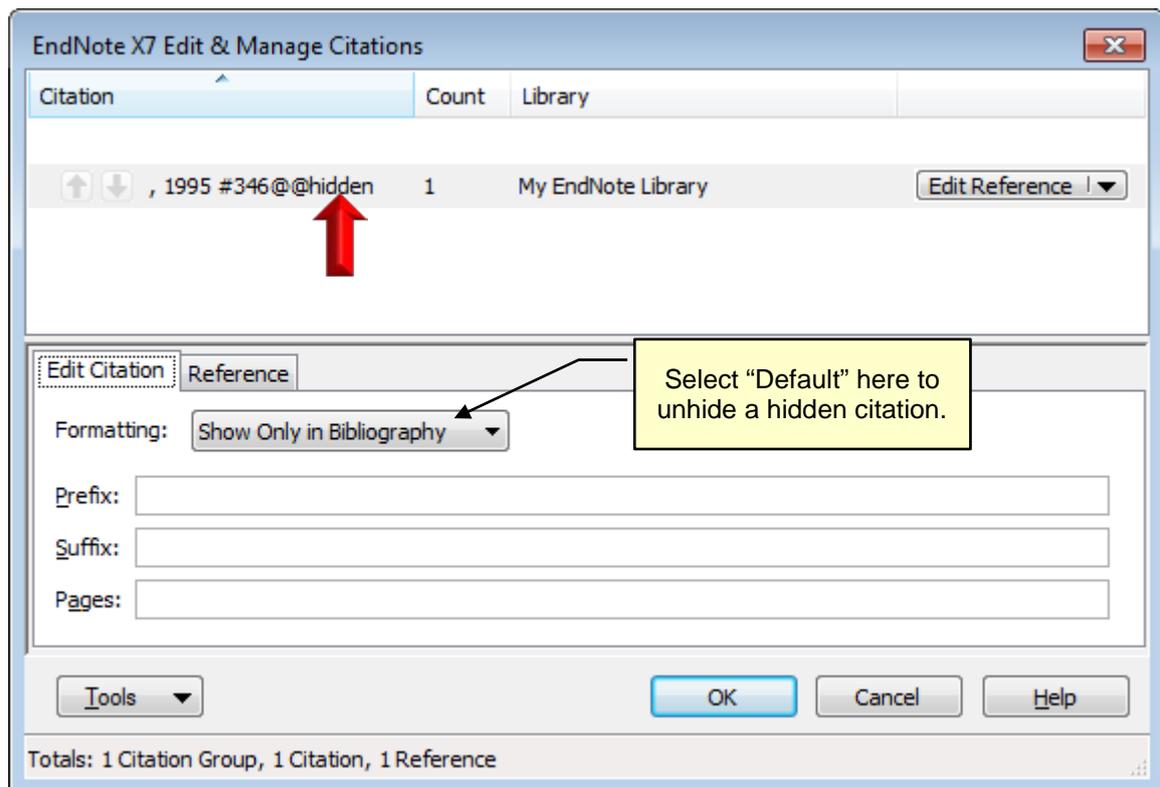
➤ **Add a citation to an Act to a Word document using EndNote:**

By default, EndNote can only deal with citations which take the basic format (Author, Year) or Author (Year). Because Acts of Parliament require a different format, the process of creating a citation to an Act with EndNote is slightly more involved. Do the following:

1. Type the in-text citation to the Act manually. For example:
Section 9(1)(a) of the Liquor Act (59/2003) ...
2. Position Word’s insertion point (i.e., the blinking cursor) directly after the closing bracket of the in-text citation you have typed. In this example, the insertion point should be positioned as is shown below:

3. Switch to EndNote. Select the entry of the Act to be cited in the middle panel of EndNote’s main screen and click the “Insert Citation” icon () to insert a citation to the Act.
4. The citation will be inserted in the format (Anon., date) and the list of references will be updated to include an entry to the Act. However, the citation is clearly not in the correct format.
5. Right-click on the (Anon., date) citation field and then choose “Edit Citation(s)” and “Show Only in Bibliography” from the pop-up menu (see screen print below).



6. The EndNote citation that you have inserted in Step 4 above will now be hidden from view, but the corresponding entry in the list of references will remain visible.
7. You only have to insert a hidden citation to an Act once into a Word document to include the Act in the list of references.
8. To view hidden citations in a Word document, click “Edit & Management Citation(s)” in the “Citations” group of the “EndNote X7” tab in Word. The “EndNote X7 Edit & Manage Citations” dialogue box will appear (see screen print below). Hidden citation are marked as “hidden” as is shown below.

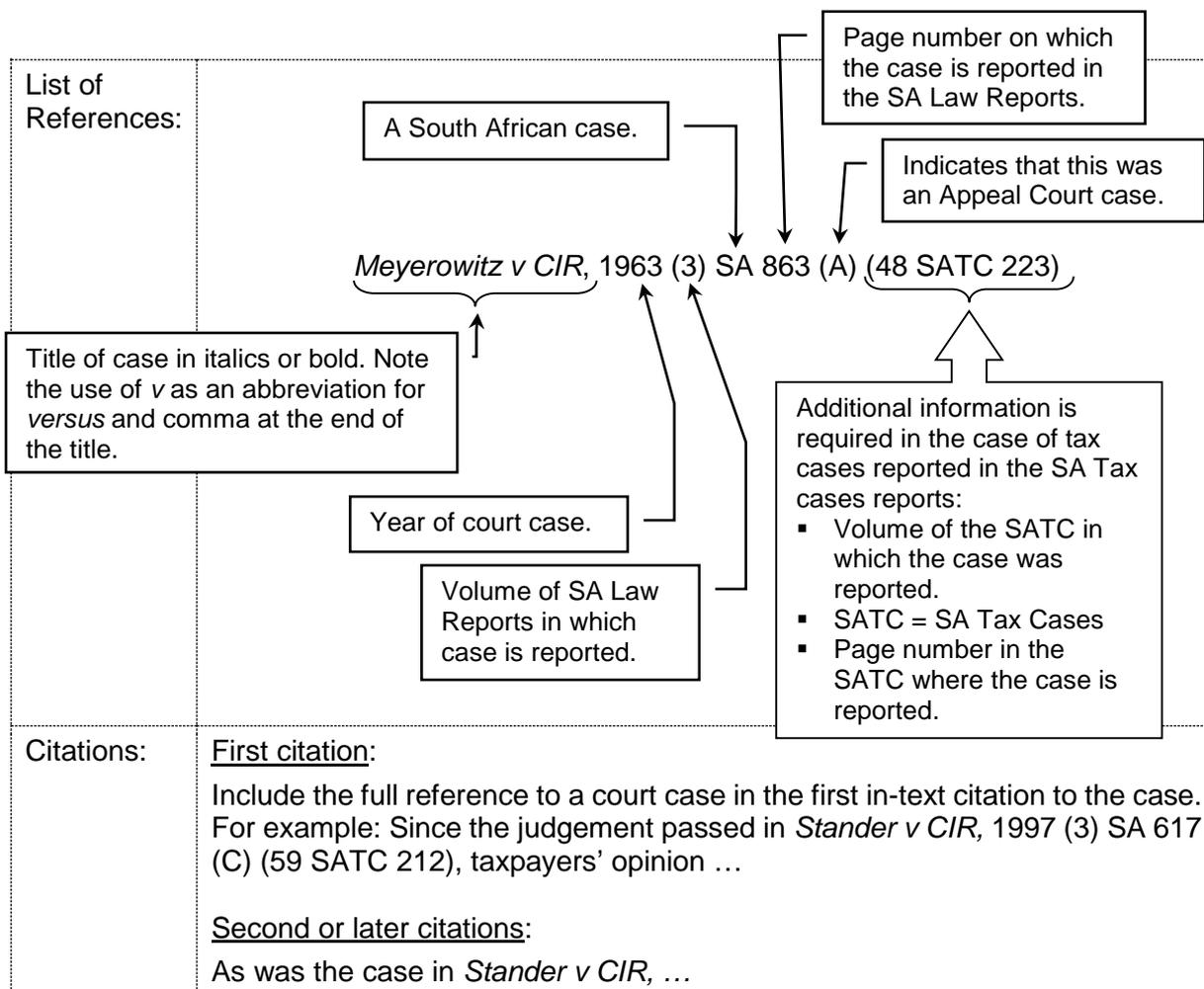


9. To unhide a hidden citation, click on the citation entry in the top part of the “EndNote X7 Edit & Manage Citations” dialogue box. Next, change the formatting to “Default” in the “Formatting” drop-down list (see screen print above).

8.12 COURT CASES

Different academic departments have different requirements regarding the citing of court cases. Please consult your specific academic department for guidance in this regard or use one of the three options shown below consistently.

Option 1: Manual citations to court cases



Note the following:

- Court cases should not be listed separately in the list of references, but should be sorted alphabetically based on the case title along with the other entries in the list of references.

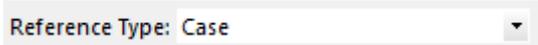
Option 2: Cite court cases using hidden citations in EndNote

By default, EndNote can only handle in-text citations in the format Author (Year) or (Author, Year). As a result, it cannot create in-text citations for court cases in the format shown above. Do the following to circumvent this problem:

➤ Add the details of an court case manually to an EndNote library:

Do the following to manually add the bibliographic information of a court case to an EndNote library:

1. Click the “New Reference” icon () on the top icon bar to open a new, blank reference page.

2. Change the “Reference Type” to “Case”: 

3. Enter the following details in the fields indicated below:

Case Name: Enter the name of the case as shown in Option 1 above followed by a comma (e.g., *Stander v CID*,). The comma is important to ensure that EndNote treats all the text before the comma as a unit.

Year Decided: Enter the year in which the case was reported in the format YYYY (e.g., 1997).

Court: Enter the abbreviation for the court that adjudicated the case. For example, enter a C to indicate that this was a Cape Provincial Division case.

Reporter Volume: Enter the volume of the SA Law Reports in which the case was reported (e.g., 3).

First Page: Enter the page number of the first page on which the case is reported in the SA Law Reports in this field (e.g., 617).

Label: Enter SA in this field to indicate that this is a South African case.

Reporter Abbreviation: This is an optional field. The information in this field is required if a case was reported in the SA Tax Cases (SATC) reports. Enter the information in the following format:

- The volume of the SATC report in which the case was reported (e.g., 59)
- The abbreviation SATC to indicate “SA Tax Cases”.
- The number of the first page on which the case is reported (e.g., 212)

For example: 59 SATC 212

4. Press Ctrl and S on the keyboard simultaneously to save the newly created manual entry. Alternatively, choose File, Save from the top menu bar.

5. Close the Reference Window to return to the main EndNote library screen.

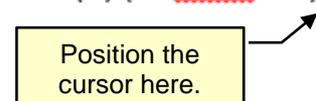
➤ **Add a hidden citation to a court case to a Word document using EndNote:**

1. Type the in-text citation to the case manually. For example:

Since the judgement passed in *Stander v CIR*, 1997 (3) SA 617 (C) (59 SATC 212) ...

2. Position Word’s insertion point (i.e., the blinking cursor) directly after the in-text citation you have typed. In this example, the insertion point should be positioned as is shown below:

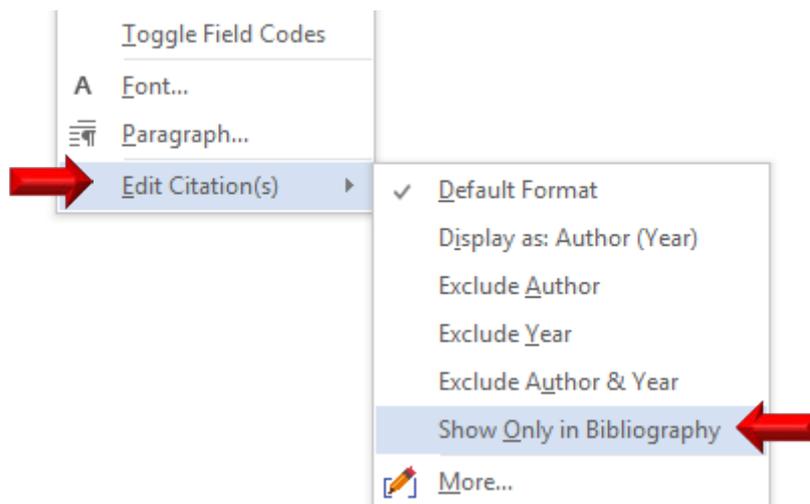
Since the judgement passed in *Stander v CIR*, 1997 (3) SA 617 (C) (59 SATC 212)| ...



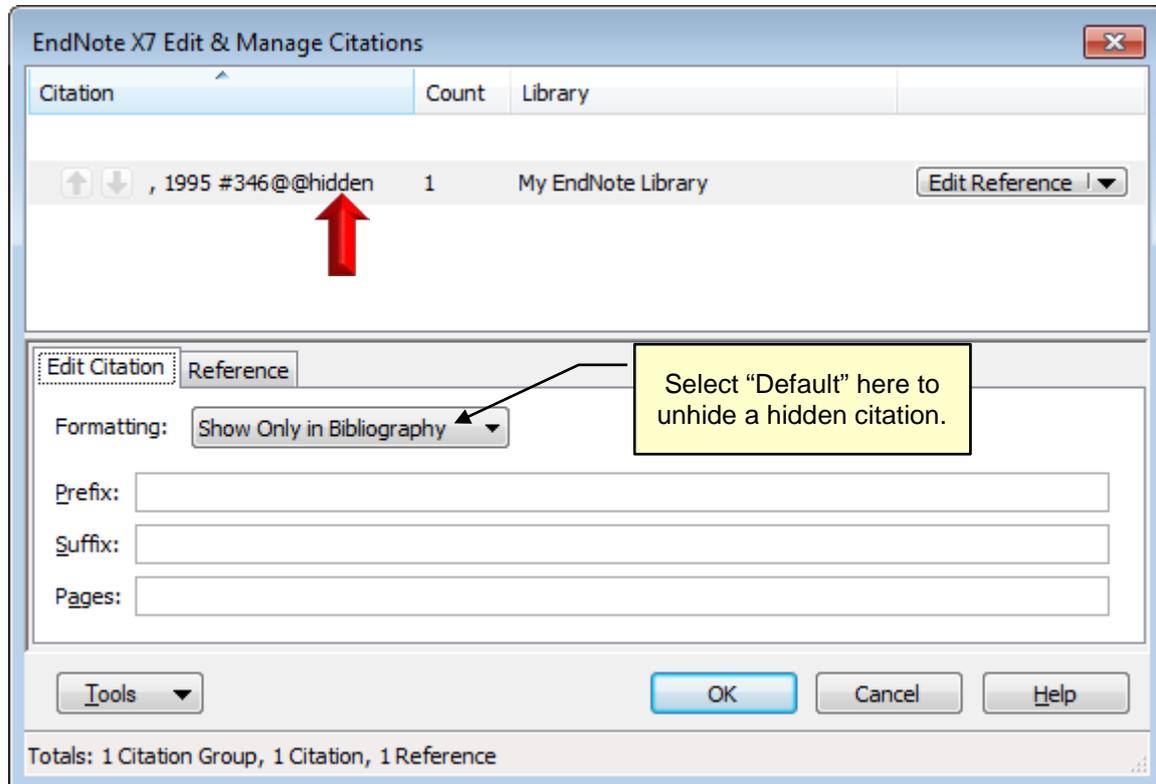
3. Switch to EndNote. Select the entry of the case to be cited in the middle panel of EndNote’s main screen and click the “Insert Citation” icon () on the main icon bar to insert a citation to the court case.

4. The citation will be inserted in the format (Case title, date) and the list of references will be updated to include an entry to the case. However, the citation is clearly not in the correct format.

5. Right-click on the (Case title, date) citation field and then choose “Edit Citation(s)” and “Show Only in Bibliography” from the pop-up menu (see screen print below).



6. The EndNote citation that you have inserted in Step 4 above will now be hidden from view, but the corresponding entry in the list of references will remain visible.
7. You only have to insert a hidden citation to a court case once into a Word document to include the case in the list of references.
8. To view hidden citations in a Word document, click “Edit & Management Citation(s)” in the “Citations” group of the “EndNote X7” tab in Word. The “EndNote X7 Edit & Manage Citations” dialogue box will appear (see screen print below). Hidden citations are marked as hidden as shown below.

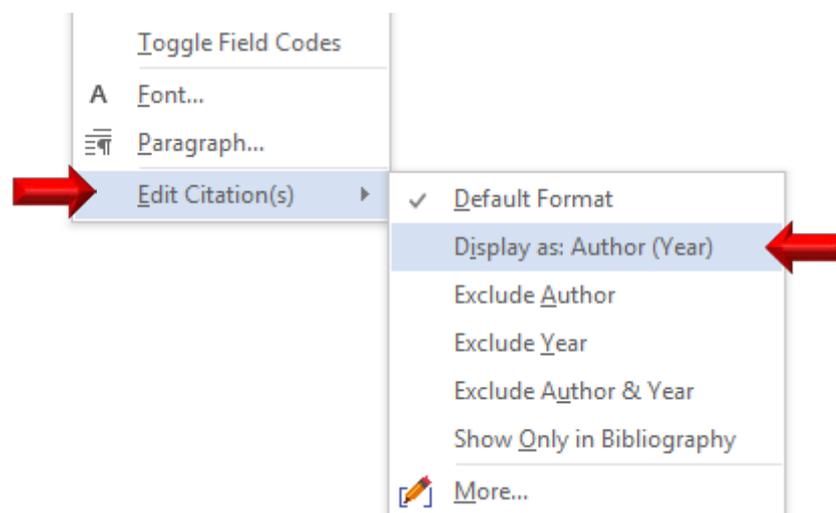


9. To unhide a hidden citation, click on the citation entry in the top part of the “EndNote X7 Edit & Manage Citations” dialogue box. Next, change the formatting to “Default” in the “Formatting” drop-down list (see screen print above).

Option 3: Cite court cases using normal in-text citations in EndNote

This option is essentially the same as Option 2 above. Only the format of the in-text citations differs somewhat. Where Option 2 uses hidden citations, this option uses the default (Author, Year) citation format. Do the following to use this option:

1. Position Word's insertion point (i.e., the blinking cursor) where you wish to insert the citation.
2. Switch to EndNote. Select the court case to be cited in the middle panel of the EndNote main screen. With the case selected, click the "Insert Citation" icon () on the main icon bar to insert a citation to the case.
3. The citation will be inserted in the default (Author, Year) format. For example: (Stander v CIR, 1997). The list of references will also be updated to include an entry to the case.
4. Right-click on the citation field and choose "Edit Citation(s)", "Display as: Author (Year)" from the pop-up menu as is shown below. The in-text citation will change to the Author (Year) format. For example: Stander v CIR (1997).



8.13 PERSONAL INTERVIEWS

There are two options for referring to personal interviews. While the first option is preferable, you may choose any one of these two options and then use it consistently.

Option 1: In terms of the first option, personal communications are not included in the list of references, as the reader cannot trace them. Details are included in the text:

In an interview conducted with Mr. A.J. Chang, marketing manager of Edgars, on 2002-11-28, he mentioned that ...

Option 2:

Citation:	According to a communication by Mr. J.J. van der Merwe (1979), mampoer was already being distilled in the Marico area as early as 1841.
List of References:	Van der Merwe, J.J. 1979. Verbal communication with the author on 2 February. Zeerust. (Cassette recording in possession of author).

or

Van der Merwe, J.J. 1979. Verbal communication with the author on 2 February. Zeerust. (Transcript / notes in possession of author).

8.13.1 EndNote fields required for court cases

This source type is not currently supported in the Harvard (UP EMS) output style in EndNote. References to personal interviews will, therefore, have to be inserted manually.

8.14 PRESS RELEASES

The following is an extract from a press release published on the web site of SAB Miller.

Tuesday, 17 September 2002

Results and EPS for first five months ahead of prior year, integration of Miller Brewing Company underway

London and Johannesburg, 17 September 2002. Prior to the commencement of the close period ahead of the interim results due in November, Graham Mackay, Chief Executive of SABMiller plc, has provided an update to the AGM statement issued on 31 July 2002.

Mr Mackay said: "For the five months ended 31 August 2002, the group has delivered results and earnings per share ahead of prior year - a very satisfactory performance in the light of the significant depreciation of some Southern African currencies in 2001.

Europe's results are especially pleasing. Our Central and Eastern European businesses produced good volume growth, despite the impact of flooding in the Czech Republic. Both Poland and the Czech Republic have performed particularly well. In Russia, volumes are ahead of last year but behind expectations."

Use the following referencing methods to refer to this press statement:

Citation:	... (SAB Miller, 2002).
List of References:	SAB Miller. 2002. <i>Results and EPS for first five months ahead of prior year, integration of Miller Brewing Company underway</i> . Press statement issued on Tuesday, 17 September 2002. [Online] Available from: http://www.sab.co.za [Accessed: 2002-12-02].

8.14.1 EndNote fields required for the reference type "Press Release"

Author: Same as the "Author" field of a "Book" (see Section 8.1.3, p. 28).

If the author is a business, government department or other organisation, place a comma after the organisation's name (e.g., South African Reserve Bank,). If the organisation's name contains a comma, then enter a double comma in place of this comma and add a comma at the end (e.g., United Nations Educational,, Scientific and Cultural Organization,)

If a source has no identifiable human or organisational author, leave the field blank. EndNote will automatically replace a blank field with "Anon". Use this option as a last resort.

Year: Enter the year in which the press statement was released or published in this field in the format YYYY (e.g., 2014).

Title: Enter the title of the press statement in this field in sentence case.

Date: Add the date on which the press statement was issued or published in this field in the format DD Month in words (e.g., 12 February). Omit the year from this field.

Additional required fields for press statements accessed on or downloaded from the Internet:

URL: Include the correct URL of all online sources downloaded from or accessed on the Internet. If the source was downloaded as an electronic file (e.g., a PDF file), then include the URL of the web page from which the file was downloaded in this field and not the URL of the electronic file itself.

Access Date: Add the date on which you first accessed or downloaded the source from the Internet in this field in the format: YYYY-MM-DD (e.g., 2013-12-11).

8.15 WEB PAGES

Web pages refer to any information (other than electronic journal articles and electronic books) that is published on the World Wide Web. A web page includes a single page within a larger corporate or organisational web site as well as a posting on a blog or wiki.

Information can be published in a number of formats on the World Wide Web. In general, one can distinguish between **web pages** (in .htm, .html, .xml & .asp format) and **files** downloaded from the web (e.g., in .pdf or .docx format). This section focussed on references to web pages, while Section 8.16 focusses on files downloaded from the Internet.

References to information on the World Wide Web are similar to references to web-based electronic journals (see Section 8.5.2 on p. 34). The basic structure of a reference to information on the World Wide Web is as follows:

Author, Initials. Year. *Title of article or web page in sentence case*. [Online] Available from: URL [Accessed: Date accessed].

Citation:	In his inaugural address, Mandela (1994) stated that ... Member checking is a controversial technique that is often used to demonstrate the credibility of qualitative research efforts (Qualitative Research Guidelines Project, 2008).
List of References:	Author, Initials. Year. <i>Title of article or web page in sentence case and italics</i> . [Online] Available from: URL [Accessed: Date accessed]. Mandela, N. 1994. <i>Statement of the president of the ANC, Nelson Mandela, at his inauguration as president of the Republic of South Africa on 10 May 1994</i> . [Online] Available from: http://anc.org.za:80/ancdocs/speeches/inaugta.html [Accessed: 1996-10-10]. Qualitative Research Guidelines Project. 2008. <i>Member checks</i> . [Online] Available from: http://www.qualres.org/HomeMemb-3696.html [Accessed: 2015-10-29].

Note the following:

1. You should be wary of information published on the Internet unless you are confident that the source or author is credible and authoritative. Also see the discussion in Section 4 on p. 5.

2. The content of the Internet is dynamic. It is, therefore, advisable to print a hard copy of the web pages that you have cited in an assignment to ensure that the information you have used remains available when the specific web pages are deleted, changed or moved.
3. Never include URLs in in-text citations to web pages. URLs should only appear as part of the entry in the list of references.
4. Citations to web pages will never include page numbers.
5. Cite each individual web page within a larger web site as a separate source.
6. Include the specific URL (web address) of a web page in the list of references.
7. Use the name of the company or organisation as the author if a web site does not have an identifiable human author. For example:
 American Association for Public Opinion Research (AAPOR). 2010. *Disclosure standards*. [Online] Available from: <https://www.aapor.org/AAPORKentico/Standards-Ethics/AAPOR-Code-of-Ethics/Survey-Disclosure-Checklist/Disclosure-Standards.aspx> [Accessed: 2015-11-18].
8. If the company or organisation has a very long name and an official abbreviation, then the abbreviation may be used in place of the full name in in-text citations. For example: It is important to indicate who commissioned, conducted and sponsored a public opinion survey (AAPOR, 2010).
9. Use the date on which the web page or web site was created or last updated as the “year of publication” as is show in the examples above. This date is often shown at the bottom of a web page or at the bottom of the “home page” of a web site.
 Use “Not dated” if no date is given:
 University of Pretoria. Not dated. *Plagiarism prevention*. [Online] Available from: <http://www.library.up.ac.za/plagiarism/index.htm> [Accessed: 2015-10-29].
10. If a web page does not have a clear title, use the most distinctive and most unique heading on the web page as the title in the list of references.
11. The title of a web page should be typed in sentence case and *italics*.

8.15.1 EndNote fields required for the reference type “Web Page”

Author: Same as the “Author” field of a “Book” (see Section 8.1.3, p. 28).

If the author is a company or other organisation, place a comma after the organisation’s name (e.g., South African Reserve Bank,). If the organisation’s name contains a comma, then enter a double comma in place of this comma and add a comma at the end (e.g., United Nations Educational,, Scientific and Cultural Organization,)

If a source has no identifiable human or organisational author, leave the field blank. EndNote will automatically replace a blank field with “Anon”. Only use this option as a last resort.

Year: Add the year in which the specific web page was created or last updated in this field in the format YYYY (e.g., 2014). If no date is specified on the web page or on the web site’s home page, then add “Not dated” (without the inverted commas) here.

Title: Add the title or most descriptive heading on the web page in this field in sentence case.

Access Date: Add the date on which you first accessed the web page on the Internet in this field in the format: YYYY-MM-DD (e.g., 2013-12-11).

URL: Add the URL (web address) of the specific web page to this field.

8.16 ELECTRONIC DOCUMENTS AND FILES DOWNLOADED FROM THE INTERNET

The referencing method described in Section 8.15 above also applies to all electronic documents, other than journal articles, that were downloaded from the World Wide Web in .pdf, .docx or any other file format. If the pages of a downloaded document are numbered, one has to include page numbers in all citations. For example:

Citation:	According to Nicholson (2000:8), no standard Harvard referencing method for citing electronic sources of information has yet been agreed upon. It is important to role-play a qualitative interview before conducting the first real interview (Mack, Woodsong, MacQueen, Guest & Namey, 2005:6).
List of References:	Author, Initials. Year. <i>Title of downloaded document in sentence case</i> . [Online] Available from: URL [Downloaded: Date accessed]. Nicholson, I. 2000. <i>Harvard referencing</i> . 2nd ed. Brisbane, Queensland: Moreton Institute of TAFE. [Online] Available from: www.home.gil.com.au/~jandi/harvard/Harvard_v.2.02.pdf [Downloaded: 2002-12-02]. Mack, N, Woodsong, C., MacQueen, K., Guest, G. & Namey, E. 2005. <i>Qualitative research methods: a data collector's field guide</i> . [Online] Available from: http://www.fhi360.org/resource/qualitative-research-methods-data-collectors-field-guide [Accessed: 2015-10-29]. Taylor-Powell, E. & Renner, M. 2003. <i>Analyzing qualitative data</i> . [Online] Available from: http://learningstore.uwex.edu/Analyzing-Qualitative-Data-P1023.aspx [Accessed: 2015-11-18].

Note the following:

1. You should be wary of information published on the Internet unless you are confident that the source or author is credible and authoritative. Also see the discussion in Section 4 on p. 5.
2. Where possible, include the URL (web address) of the specific web page from which a file was downloaded or else provide the URL or web link to the file itself.
3. Always indicate the date on which the file was first accessed in the format YYYY-MM-DD.

8.16.1 EndNote fields required for the reference type "Report"

You may use the "Report" reference type in EndNote for any document file (e.g., PDF, .docx, etc.) that you have downloaded from the Internet and that is not specifically covered by any of the other reference types listed in Table 3 on p. 25.

Author: Same as the "Author" field of a "Book" (see 8.1.3, p. 28).

If the author is a company or other organisation, place a comma after the organisation's name (e.g., South African Reserve Bank,). If the organisation's name contains a comma, then enter a double comma in place of this comma and add a comma at the end (e.g., United Nations Educational,, Scientific and Cultural Organization,)

If a source has no identifiable human or organisational author, leave the field blank. EndNote will automatically replace a blank field with “Anon”. Only use this option as a last resort.

Year: Add the year in which the document was published or created in this field in the format YYYY (e.g., 2014). If no year or publication is available, enter “Not dated” (without the inverted commas).

Title: Enter the title of the document in this field in sentence case.

Place Published: Enter the place of publication in this field. If the place of publication is unknown and a publisher is specified, enter “Not known” here (without the inverted commas). If the place of publication is unknown and no publisher is specified, leave this field blank.

Publisher: Same as “Book” (see Section, 8.1.3, p. 28).

URL: Include the correct URL of all online sources downloaded from or accessed on the Internet. If the source was downloaded as an electronic file (e.g., a PDF file), then include the URL of the web page from which the file was downloaded in this field and not the URL of the electronic file itself.

Access Date: Add the date on which you first accessed or downloaded the source from the Internet in this field in the format: YYYY-MM-DD (e.g., 2013-12-11).

8.17 ONLINE DICTIONARIES AND ENCYCLOPEDIAS

One should be wary of using online dictionaries and encyclopedias as sources of information for academic assignments unless it has been established that the specific online source was compiled by a reputable organisation, institution or author.

The online dictionaries and encyclopedias listed in the UP Library’s catalogue are generally regarded as reputable. See the following links:

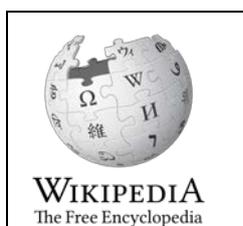
<http://explore.up.ac.za/search~S9/X?%28Dictionaries%29&SORT=DX&b=eco>

<http://innopac.up.ac.za/search~S9/X?%28Encyclopedias%29&SORT=DX&b=eco>

<http://www.library.up.ac.za/ebooks/subref.htm>

There are also several excellent dictionaries and encyclopedias related to research methodology available on Sage Research Methods Online. See:

- Dictionaries on research methods:
<http://0-srmo.sagepub.com.innopac.up.ac.za/browse?doctype=dictionary&page=1&pageSize=20&sortorder=DATE>
- Encyclopedias on research methods:
<http://0-srmo.sagepub.com.innopac.up.ac.za/browse?doctype=encyclopedia&page=1&pageSize=20&sortorder=DATE>



Since the content of Wikipedia is compiled and edited by volunteers and has not been verified through a formal process of peer review, it **should not be used** as a source of information for an academic assignment. External examiners usually react negatively to references to Wikipedia.

When referencing online dictionaries or encyclopedias, one would use the same principles that apply for web pages in general (see the discussion in Section 8.15). Consider the following examples:

- **Referring to an online dictionary**

A student looked up the meaning of the word ‘econometrics’ on the Oxford Dictionaries web site. She received the following answer:

Econometrics /ikonnmetriks/

- **plural noun** treated as sing. the branch of economics concerned with the use of mathematical methods (especially statistics) in describing economic systems.

— DERIVATIVES **econometric** adjective **econometrician** noun **econometrist** noun.

URL: <http://www.oxforddictionaries.com/definition/english/econometrics?q=econometrics>

She referred to this information in the following manner:

Citation:	Econometrics can be defined as “... the branch of economics concerned with the use of mathematical methods (especially statistics) in describing economic systems.” (Oxford Dictionaries, Not dated.)
List of References:	Author, Initials. Year. <i>Title of entry or web page in sentence case</i> . [Online] Available from: URL [Accessed: Date accessed]. Oxford Dictionaries. Not dated. <i>Econometrics</i> . [Online] Available from: http://www.oxforddictionaries.com/definition/english/econometrics?q=econometrics [Accessed: 2014-01-22].

- **Referring to an online encyclopedias**

The correct way to refer to an entry in an online encyclopedia depends on the information available. If the specific entry in the encyclopedia has an identifiable author or authors and the encyclopedia has an identifiable editor or editors, then the entry is treated in the same way as an online version of a book with chapters by different authors (see Section 8.2, p. 29).

Citation:	... (Eaves & Woods, 2007). Eaves and Wood (2007) define concurrent validity as ...
List of References:	Eaves, R. & Woods-Groves, S. 2007. Criterion validity. In: Salkind, N.J. & Rasmussen, K. (eds.) <i>Encyclopedia of measurement and statistics</i> . Thousand Oaks, CA: Sage. [Online] Available from: http://0-dx.doi.org.innopac.up.ac.za/10.4135/9781412952644.n113 [Accessed: 2014-01-22].

If the specific entry in the encyclopedia has no identifiable author(s), but the encyclopedia has an identifiable author or editor, the entry is treated in the same way as an online book (see Section 8.3, p. 30):

Citation:	... (Clow & Stevens, 2008). Clow and Stevens (2008) define concurrent validity as ...
List of References:	Clow, K.E. & Stevens, R.E. 2008. <i>Concise encyclopedia of professional services marketing</i> . Florence, KY: Routledge. [Online] Available from: http://0-site.ebrary.com.innopac.up.ac.za/lib/pretoria/docDetail.action?docID=10267135 [Accessed: 2014-01-22].

8.17.1 EndNote fields required for the reference type “Dictionary” and “Encyclopedia”

- For a dictionary or encyclopedia with an overall author or editor, but with no unique author for each specific entry:

Use the “Electronic Book” reference type in EndNote (see Section 8.3.1, p. 30).

- For a dictionary or encyclopedia with an overall author or editor and with a unique author for each specific entry:

Use the “Dictionary” or “Encyclopedia” reference types in EndNote.

Author: Same as the “Author” field of a “Book” (see Section 8.1.3, p. 28).

Year: Enter the year of publication of the dictionary / encyclopedia in this field in the format YYYY (e.g., 2014).

Title: Enter the title of the specific dictionary or encyclopedia entry in this field in sentence case.

Editor: Enter the surnames and initials of the book’s editor(s) in the format: Surname, Initials (e.g., Jones, A.B. or Jones, A B) or

Surname, Full names (Jones, Adam Brian)

The comma after the surname is very important as EndNote uses the comma to distinguish between the surname and the initials.

Enter each editor’s details on a separate line.

Dictionary Title / Encyclopedia Title: Enter the title of the dictionary / encyclopedia in this field in sentence case.

Place Published: Same as the “Place Published” field of a “Book” (see Section 8.1.3, p. 28).

Publisher: Same as the “Publisher” field of a “Book” (see Section 8.1.3, p. 28).

URL: Add the URL of the web page of the specific entry in the dictionary or encyclopedia being cited.

Access Date: Add the date on which you first accessed the source on the Internet in this field in the format: YYYY-MM-DD (e.g., 2013-12-11).

8.18 OTHER ELECTRONIC SOURCES

This section deals with references to e-mail messages and posting in online discussion forums or chat groups.

8.18.1 E-mail messages

Citation:	According to Swanepoel (2010), students require information about ...
List of References:	Surname of sender, Initials of sender. (sender’s e-mail address) Year. Title or subject of e-mail message. [E-mail to:] Receiver’s surname. Receiver’s initials. (Receiver’s e-mail address) Date received. Swanepoel, C.B. (cbs@info.rau.ac.za) 2010. Discussion of library statistics. [E-mail to:] Van der Walt, E.J. (fpbjvdw@puknet.puk.ac.za) 2010-11-17.

This source type is not currently supported in the Harvard (UP EMS) output style in EndNote. References to e-mail messages will, therefore, have to be inserted manually.

8.18.2 Discussion forums / chat groups

Citation:	Drabenstott (1996) points out that students require information about ...
List of References:	Surname of sender, Initials of sender. (sender's e-mail address) Year. Title or subject of e-mail message. [Discussion group:] e-mail address of the discussion group. Date received. Drabenstott, K.M. (Karen.drabenstott@umich.edu) 1996. Strategic planning. [Discussion group:] crystal-ed@sils.umich.edu. 1996-10-29.

This source type is not currently supported in the Harvard (UP EMS) output style in EndNote. References to postings in discussion forums or chat groups will, therefore, have to be inserted manually.

8.19 AUDIO-VISUAL MATERIAL AND OTHER ELECTRONIC MEDIA

Electronic media and audio-visual material include films, CDs, DVDs, cassette recordings, television broadcasts, radio broadcasts, live performances, podcasts, video clips and PowerPoint presentations.

In all cases, you should adapt the following generic format based on the available information:

Author. Date. *Title in sentence case and italics*. Place of publication: Publisher or distributor. [Media type].

In the case of an online source, the following have to be added to the generic format above: [Online] Available from: URL [Accessed: Date accessed].

Note the following:

1. The normal format for a citation is used with the name of the main artist, presenter (narrator), producer, director **or** author (writer) and the date of publication shown.
2. If the audiovisual medium does not have a specific author, then use the name of the main artist, presenter (narrator), producer, or director in place of the author.
3. In the case of a television or radio broadcast or live performance, it is advisable to include the broadcast or performance date in round brackets directly after the title.
4. The media type must be specified in square brackets after the name of the publisher or distributor. Use one of the following specifications depending on the type of audiovisual material involved:
 - [CD].
 - [DVD].
 - [Video recording].
 - [Video presentation].
 - [Sound recording].

- [Television broadcast].
- [Radio broadcast].
- [Podcast].
- [Live performance].
- [PowerPoint presentation].

Here are a few examples:

Farrar, L., Stern, N. & Goralnick, J. 2008. *How to read and understand a research study*. New York, NY: Insight Media. [DVD].

North Carolina State University Library. Not dated. *Literature reviews: an overview for graduate students*. Raleigh, NC: North Carolina State University. [Video presentation]. [Online] Available from: <http://www.lib.ncsu.edu/tutorials/lit-review/index.html> [Accessed: 2010-11-19].

Petty, N. (developer). Not dated. *Hypothesis testing (difference of two means)*. [Video presentation]. [Online] Available from: <http://www.youtube.com/watch?v=BX9iMIC6mcg> [Accessed: 2010-11-19].

Robinson, F. (presenter). 2009. *Focus*. (2009-06-20). Auckland Park, Johannesburg: SABC. [Television broadcast].

Samuels, L. (producer). 2010. *Schuks Tshabalala's survival guide to South Africa*. Johannesburg: Out of Africa Entertainment. [DVD].

8.19.1 EndNote fields required for the reference type "Audiovisual Material"

Author: Same as the "Author" field of a "Book" (see Section, 8.1.3, p. 28).

Label: In the case of audio-visual material, this field can be used to identify the author of the material as the developer, producer, presenter or narrator thereof. Enter a suitable descriptor, such as developer, producer, presenter or narrator, in this field in lower case. EndNote will automatically insert the descriptor entered here in round brackets after the information entered into the "Author" field. Alternatively, leave this field blank.

Year: Enter the year in which the audio-visual material was published in this field in the format YYYY (e.g., 2014).

Title: Enter the title of the audio-visual material in this field in sentence case.

Place Published: Enter the place of publication in this field. If the place of publication is unknown and a publisher is specified, enter "Not known" here (without the inverted commas). If the place of publication is unknown and no publisher is specified, leave this field blank.

Publisher: Same as the "Publisher" field of a "Book" (see Section, 8.1.3, p. 28).

Type: Specify the type of audio-visual material in this field in sentence case. Possible options include: CD, DVD, Video recording, Video presentation, Sound recording, Television broadcast, Radio broadcast, Podcast, Live performance, or Narrated PowerPoint presentation. EndNote will automatically insert the contents of the "Type" field in square brackets after the title.

Additional required fields for audio-visual material accessed on or downloaded from the Internet:

URL: Include the correct URL of all online sources downloaded from or accessed on the Internet. If the source was downloaded as an electronic file (e.g., a PDF file), then include the URL of the web page from which the file was downloaded in this field and not the URL of the electronic file itself.

Access Date: Add the date on which you first accessed or downloaded the source from the Internet in this field in the format: YYYY-MM-DD (e.g., 2013-12-11).

9 REFERENCING WHEN DETAILS ARE NOT KNOWN

Always try to provide complete references to all the sources that you have cited in the text of an academic document. However, it sometimes happens that one does not have all the required information to prepare a complete reference. This section considers how to reference a source when one does not know certain details.

Unknown details	Solution
Author	Avoid anonymous sources as far as possible, as external examiners generally question the use of such sources. Where a source with no identifiable human author was published by an organisation, the name of the organisation should be used in the place of the author. As a last resort, the abbreviation "Anon." (without the inverted commas) may be used in place of the author when the author of a web page or newspaper article is unknown.
Date of publication	Avoid undated sources as far as possible, as external examiners generally question the use of such sources. As a last resort, use "Not dated." or "n.d." (without the inverted commas) in the place of the year in both the citations and the list of references.
Publisher	Double-check the UP Library's online catalogue. As a last resort, use the phrase "Not known." (without the inverted commas) in place of the publisher in the list of references.
Place of publication	Double-check the UP Library's online catalogue. As a last resort, use the phrase "Not known." (without the inverted commas) instead of the place of publication in the list of references.

10 HOW TO INTERPRET A *TURNITIN* ORIGINALITY REPORT



As mentioned in Section 2.4, you should always submit a document to Turnitin via the relevant course web site in clickUP to check the document for possible instances of plagiarism before submitting the document to a lecturer for evaluation.

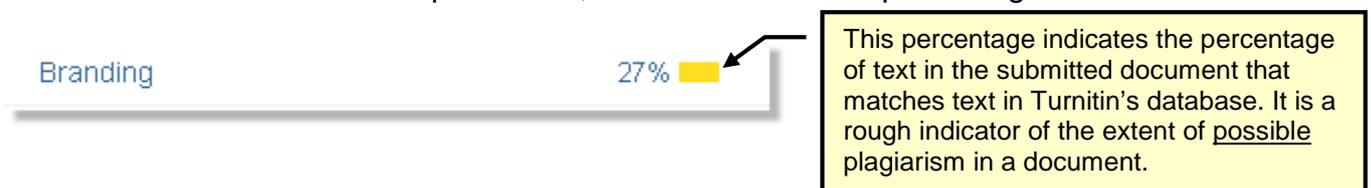
See the “*Turnitin step sheet for students*” on the following web site for additional guidance in this regard: https://clickup.up.ac.za/bbcswebdav/pid-279399-dt-content-rid-1835061_1/xid-1835061_1

Once you have submitted a document to Turnitin, it will be processed and Turnitin will produce an originality report. It may take Turnitin two to three hours to process a document depending on the length of the document and also the intensity of web traffic to Turnitin’s servers. Once you have submitted a document to Turnitin, exit clickUP, wait at least an hour and then return back to the Turnitin module on the course web site in clickUP where you have submitted the document to retrieve the originality report.

If your document is still being processed, the icon to the left of the document title in the “Report column” in your Turnitin in-box will be greyed out:



Once the document has been processed, the icon will show a percentage and a colour bar.



Click on the percentage colour bar icon to access the Turnitin originality report. Depending on the settings of Turnitin, you may see the originality report in either the “Document View” (shown at the top of the next page) or the “Text-Only Report View” window (shown at the bottom of the next page).

Turnitin Document Viewer - Mozilla Firefox

turnitin.com https://api.turnitin.com/cv?s=1&o=124646716&u=19993842&lang=en_us&session-id=115ea9226d6b1c56bd1e10b99852a878

programme_portal_ General Assignments Help Paper 3 of 46

Originality GradeMark PeerMark Branding turnitin SIMILARITY INDEX 27%

Primary Source View

1	web.up.ac.za Internet source	22%
2	thesunnews.typepad.com Internet source	3%
3	www.scribd.com Internet source	1%
4	www.massey.ac.nz Internet source	1%

NEITHER MEANING, NOR MA

PAGE: 1 OF 9

Text-Only Report

Done zotero

Click here to switch to the "Text-Only View".

Turnitin - Mozilla Firefox

turnitin.com https://api.turnitin.com/newreport.asp?lang=en_us&oid=124646716&ft=1&bypass_cv=1

preferences Help

turnitin Originality Report

Document Viewer

Processed ID: 1246 Word Count: 2093 Submitted: 2

Branding By EE De milander

include quoted include bibliography excluding matches < 1% mode: show highest matches together

NEITHER MEANING, NOR MARKETING, BUT CULTURE... by Ms. E.E. De Milander 27301495 083 259 0540 else.dem

@gmail.com Submitted in partial fulfilment of the requirements for the degree BCom (Hons) in Communication Management in the FACULTY OF ECONOMIC AND MANAGEMENT SCIENCES at the UNIVERSITY OF PRETORIA Subject: 4

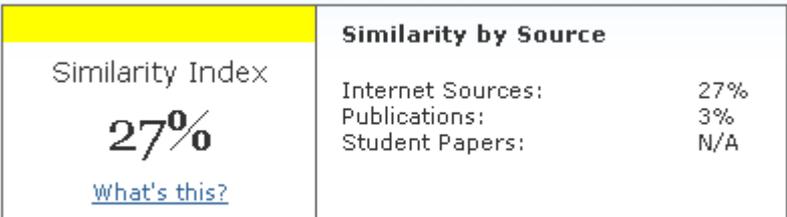
Branding and visual identity (VIO 703)
Lecturer: MS. R. Van Zyl Date of submission: 2010-08-23

1	14% match (Internet from 5/29/09) http://web.up.ac.za
2	8% match (Internet from 3/16/10) http://web.up.ac.za
3	3% match (Internet from 11/10/09) http://thesunnews.typepad.com
4	1% match (Internet from 9/20/10) http://www.scribd.com
5	1% match (Internet from 4/2/10) http://www.massey.ac.nz

zotero

Click here to switch to the "Document View".

If you maximise either view, you will see a “Similarity Index” percentage in the top right-hand corner of the screen:

Document View	Text-Only Report View
	

The similarity index, which indicates the percentage of text in the submitted document that matches text in Turnitin’s database of sources, is a rough indicator of the extent of possible plagiarism in the document. However, **one should never consider the similarity index in isolation (regardless of how high or low it is)**. Rather scroll through the report and carefully evaluate all the sections, sentences or paragraphs that Turnitin has highlighted in colour.

Each section (i.e., sentence fragment, whole sentence or paragraph) that is highlighted in colour indicates a possible instance of plagiarism in the document. Carefully check each section highlighted in colour by applying the following decision rules to each highlighted section:

- Is the highlighted section part of a direct quotation?
 - If **yes**, ensure that the direct quotation is enclosed in quotation marks and that you have included an appropriate citation to the original quoted source. You should limit the use of direct quotations to a minimum. See Section 6.2.1 on p. 13.
 - If **no**, then the highlighted portion has not been adequately paraphrased. Be sure to substantially rephrase the highlighted portion in your own words and include an appropriate citation to the original source. When paraphrasing material in your own words, you have to substantially reword the original version. Changing one or two words in each sentence to synonyms are **not** sufficient.
- Is the highlighted portion part of your own paraphrasing of the original?
 - If **yes**, then the highlighted portion has not been paraphrased adequately and will have to be further rephrased. See the discussion of paraphrasing above.
 - If **no**, then the section should be treated as a direct quotation. See the discussion of direct quotations above.

Frequent question 1: How high or low should the similarity index percentage be?

Answer: The similarity index percentage should preferably be lower than 20%. However, you should always work through the whole Turnitin report and evaluate each section highlighted in colour against the decision rules discussed above, regardless of how high or low the originality index is. Be sure to identify and, where necessary, correct all instances of possible plagiarism in your document *regardless of the value of the similarity index percentage*.

It is extremely important not to focus solely on the overall similarity index percentage when you interpret a Turnitin originality report. A similarity index below 20% does not guarantee that a document is free from plagiarism. Similarly, a similarity index higher than

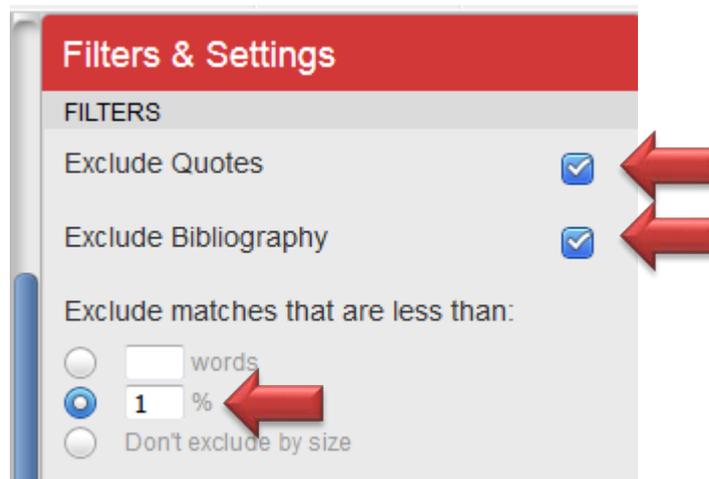
20% does not necessarily mean that a student is guilty of plagiarism. As was explained earlier, one has to work through whole the originality report in detail and carefully evaluate each of the sections that Turnitin has highlighted in colour.

Turnitin may sometimes indicate that you have “plagiarised” from a legitimate source such as the declaration regarding plagiarism or in the list of references. Do the following to avoid an artificially inflated similarity index percentage:

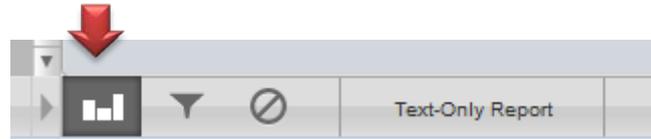
1. Remove the declaration regarding plagiarism from a document before submitting the document to Turnitin. Remember to add the declaration regarding plagiarism back again after you have received the Turnitin originality report and before you submit the document to your lecturer for evaluation.
2. You can instruct Turnitin to ignore entries in the list of references when it calculates the similarity index. To do so:
 - i. Change the heading of the list of references in your document to **REFERENCES**. This heading should be in bold, UPPERCASE letters and can be formatted as a first level heading.
 - ii. **NB:** The heading **REFERENCES** should not be numbered. If the heading is currently numbered, select the heading text and then deselect the numbering by clicking on the Numbering icon  in the “Paragraph” group on the “Home” tab in MS Word. The other headings in your document may remain numbered.
 - iii. Save the Word document and then submit it to Turnitin in the usual way.
 - iv. Once you have submitted the document to Turnitin, wait two hours and then return to the Turnitin link where the document was selected to check whether a Turnitin originality report is available.
 - v. Click on the Similarity percentage to open the report in a new window.
 - vi. Once the report is visible, click on the filter icon in the bottom right-hand corner of the screen.



- vii. A “Filter and Settings” window will appear on the right-hand side of the screen. Check that the options shown below are selected:



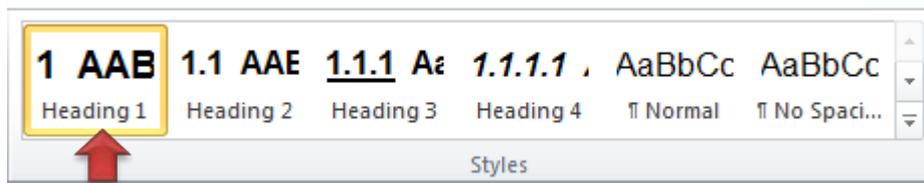
- viii. If the “Exclude Quotes” option is ticked, then Turnitin will ignore all direct quotations enclosed in double quotation marks. Note that a quoted section must start and end with a double quotation mark to be ignored.
- ix. If “Exclude Bibliography” is selected, Turnitin will ignore all the text that appear after the heading **REFERENCES**, including the text in any appendices that follow after the list of references.
- x. Click on the “View Sources” icon to return to the originality report.



- xi. To print or download a copy of the Turnitin originality report, click on the “Print” icon in the bottom left-hand corner of the screen and choose “Download PDF of Current View for Printing” from the pop-up menu..



- xii. Return to your original document in MS Word and change the heading of the list of references back to **LIST OF REFERENCES**. To renumber the heading, select the heading text and then click on the Heading 1 style in the Quick Styles window on the “Home” tab. Alternatively, use the “format painter”  to copy the formatting of another first level heading to this heading.



Frequent question 2: Turnitin has highlighted single words or very short phrases in my document. What should I do?

Answer: Turnitin is extremely sensitive and may sometimes highlight single words or very short phrases (i.e., two or three consecutive words) in colour. These minor matches are usually not a problem and may be ignored, especially if they do not form part of a larger section of text that Turnitin has highlighted in colour.

Frequent question 3: I have received a Similarity Index Percentage of 0%. What does this mean?

Answer: A lecturer can change the sensitivity of Turnitin by, for example, setting it to ignore minor matches. This may result in a Similarity Index Percentage of 0%. This typically indicates that there are no substantial matches between the content of a document and sources in Turnitin’s database.

Frequent question 4: Turnitin indicates that some of the text in my document matches text in a specific online source, but I know for a fact that I did not consult this specific online source. What should I do?

Answer: You should deal with all the sections in your document that Turnitin has highlighted in colour by following the decision rules on p. 65, regardless of whether you have consulted the specific online source that Turnitin identified or not.

Turnitin may match sections of your document to sources that you have not consulted if the text of these sources somehow match the text of sources that you have actually consulted. Perhaps the source you consulted have been plagiarised by someone else and Turnitin identifies this.

11 LIST OF REFERENCES

The referencing principles and many of the examples used in this guide were taken from the sources listed below. To avoid confusion, these sources were not cited in the text. Students should, however, include both citations and a complete list of references in all academic documents prepared in the Department of Business Management.

Botha, W.M. & du Toit, P.H. 1999. *Guidelines for the preparation of written assignments*. Pretoria: Academic Information Service, University of Pretoria.

McLean, J.G. 2001. *Physics writing guide: How to write a Physics journal article*. [Online] Available from <http://www.geneseo.edu/~mclean/Dept/JournalArticle.pdf>. [Downloaded: 2004-12-13].

Nicholson, I. 2000. *Harvard referencing*. 2nd ed. Brisbane, Queensland: Moreton Institute of TAFE. [Online] Available at: www.home.gil.com.au/~jandi/harvard/Harvard_v.2.02.pdf [Downloaded: 2002-12-02].

Potgieter, M. 1996. *Guidelines for the preparation and writing of assignments*. Pretoria: Faculty of Economic and Management Sciences, University of Pretoria.

University of Melbourne, Faculty of Economics and Commerce Teaching and Learning Unit. Not dated. *The American Psychological Association (APA) author-date reference and citation system*. [Online] Available at: <http://wff1.ecom.unimelb.edu.au/tluwww/> [Accessed: 2002-12-02].

University of Pretoria. 2009. *Plagiarism prevention policy*. Pretoria: Office of the Registrar, University of Pretoria. [Online] Available from: http://web.up.ac.za/sitefiles/file/44/1026/2407/2009-10-22_Plagiarism%2520Prevention%2520Policy.pdf [Accessed: 2010-11-18].

Van der Walt, E.J. 2006. *Quoting sources*. 4th ed. North-West University, Potchefstroom. [Online] Available from: <http://www.nwu.ac.za/library/verwysings.pdf> [Downloaded: 2008-10-08].

ANNEXURE A: Declaration Regarding Plagiarism



UNIVERSITEIT VAN PRETORIA
UNIVERSITY OF PRETORIA
YUNIBESITHI YA PRETORIA

DEPARTMENT OF BUSINESS MANAGEMENT

Declaration Regarding Plagiarism

The Department of Business Management emphasises integrity and ethical behaviour with regard to the preparation of all written assignments. Although the lecturer will provide you with information regarding reference techniques, as well as ways to avoid plagiarism (see the “*Guidelines on Referencing*” document), you also have a responsibility to fulfil in this regard. Should you at any time feel unsure about the requirements, you must consult the lecturer concerned before submitting an assignment.

You are guilty of plagiarism when you extract information from a book, article, web page or any other information source without acknowledging the source and pretend that it is your own work. This does not only apply to cases where you quote the source directly, but also when you present someone else’s work in a somewhat amended (paraphrased) format or when you use someone else’s arguments or ideas without the necessary acknowledgement. You are also guilty of plagiarism if you copy and paste information directly from an electronic source (e.g., a web site, e-mail message, electronic journal article or CD-ROM) without paraphrasing it or placing it in quotation marks, even if you acknowledge the source.

You are not allowed to submit another student’s previous work as your own. You are furthermore not allowed to let anyone copy or use your work with the intention of presenting it as his/her own.

Students who are guilty of plagiarism will forfeit all credits for the work concerned. In addition, the matter will be referred to the Committee for Discipline (Students) for a ruling. Plagiarism is considered a serious violation of the University’s regulations and may lead to your suspension from the University. The University’s policy regarding plagiarism is available on the Internet at <http://www.library.up.ac.za/plagiarism/index.htm>.

For the period that you are a student at the Department of Business Management, the following declaration must accompany **all** written work that is submitted for evaluation. No written work will be accepted unless the declaration has been completed and is included in the particular assignment.

	Student 1	Student 2	Student 3
I (full names & surname):			
Student number:			

Adapt this form to accommodate all the students who have worked on an assignment by adding or deleting columns.

Declare the following:

1. I understand what plagiarism entails and am aware of the University’s policy in this regard.
2. I declare that this assignment is my own, original work. Where someone else’s work was used (whether from a printed source, the Internet or any other source) due acknowledgement was given and reference was made according to departmental requirements.
3. I did not copy and paste any information directly from an electronic source (e.g., a web page, electronic journal article or CD ROM) into this document.
4. I did not make use of another student’s previous work and submitted it as my own.
5. I did not allow and will not allow anyone to copy my work with the intention of presenting it as his/her own work.

Signature: Student 1

Signature: Student 2

Signature: Student 3

ANNEXURE B:

The advantages and disadvantages of using EndNote

Advantages:

1. You can easily download the bibliographic information (e.g., author(s), publication date, title, etc.) of electronic journal articles and books to EndNote from online e-journal databases and catalogues, including the UP Library's e-journals collection (see <http://www.library.up.ac.za/journals/journalsplatforms.htm>) and online catalogue.
2. You can import PDF files and attach these to the entries in your EndNote library. All your sources and their associated PDF files are kept in one place on your computer. This makes it easy to create backup copies of your files for safekeeping.
3. EndNote integrates with MS Word and allows you to add citations to sources in your EndNote library while writing a document in Word. EndNote will automatically add newly cited sources to the list of references it generates in Word as they are added to a Word document.
4. The Department of Business Management's prescribed referencing style has been implemented in EndNote, so all citations and entries in the list of references that EndNote adds to a Word document will be formatted in the prescribed referencing style.
5. If you delete sources while editing a document, EndNote will remove the citations and, if necessary, also the required entries in the list of references. This removes the need to manually check that all the sources cited in the text are listed in the list of references (and *vice versa*) after a major edit.
6. You can sync your offline EndNote with a free online account. This sync-function allows you to a) easily backup your EndNote library; b) access your EndNote library on multiple computers connected to the Internet and c) share references and collaborate with other authors.
7. The desktop version of EndNote is installed on your computer. You have to be connected to the Internet to capture the bibliographic information of sources from online e-journal platforms or other catalogues, but you do not have to be connected to the Internet to cite sources in your EndNote database while writing a document in MS Word.
8. EndNote is available for free to all registered UP students. There are EndNote versions available for both Windows and Apple Mac operating systems.
9. EndNote can potentially save you a low of time and effort in the long run.

Disadvantages:

1. While EndNote is quite easy to use, you will have to experiment with EndNote and practice to use it effectively. However, if you can use MS Word, then using EndNote should be easy.
2. EndNote works best with recent versions of MS Word (such as Word 2013 or later).
3. Any errors or omissions in the bibliographic information in your EndNote library will reflect in the citations and list of references that EndNote generates. To avoid errors, you need to check that all new entries in your EndNote Library are correct and complete. Never assume that the bibliographic information imported from e-journal databases and online catalogues are correct and complete. Check the information before citing the source for the first time.
4. The bibliographic information of some sources types (e.g., court cases, legislation, web pages, files downloaded from the Internet) cannot be captured from an online platform or catalogue and, therefore, have to be added manually to an EndNote library. While easy to do, it takes a few minutes to add a source manually to an EndNote Library.
5. Never access your EndNote library directly from a cloud-based service such as Dropbox or Google Drive as this may corrupt the library. Rather use the EndNote sync function to sync your offline EndNote library to your EndNote online account and then access your online library if necessary.

ANNEXURE C: Referencing Cheat Sheet

In-text citations

Number of authors	Citation	Start of sentence	End of sentence
1 author	1 st citation to source	Creswell (2016:5) defines ...	The central phenomenon is the main topic being explored in a qualitative study (Creswell, 2016:5).
	2 nd or later citation to source	Same as above.	Same as above.
2 authors	1 st citation to source	Bryman and Bell (2012:119) mention ...	The precise measurement of specific variables is a characteristic of quantitative research (Bryman & Bell, 2012:119).
	2 nd or later citation to source	Same as above.	Same as above.
3 or more authors	1 st citation to source	Saunders, Lewis and Thornhill (2016:12) describe ...	There are several ethical principles that researchers should consider (Saunders, Lewis & Thornhill, 2016:12).
	2 nd or later citation to source	Saunders <i>et al.</i> (2016:12) describe ...	There are several ethical principles that researchers should consider (Saunders <i>et al.</i> , 2016:12).

Referencing Cheat Sheet

Basic referencing formats: List of References

Type	In-text citations	List of references
Book (see Section 8.1)	First citation, start of sentence: According to Saunders, Lewis and Thornhill (2016:23), ... Later citation, end of sentence: ... (Saunders <i>et al.</i> , 2016:23).	Saunders, M., Lewis, P. & Thornhill, A. 2016. <i>Research methods for business students</i> . 7th ed. Harlow, UK: Pearson Education. When citing a book the edition must be indicated for the <u>second or later</u> edition. Omit the edition in case of a first edition. The title of a book is always typed in sentence case and italics.
Book chapter in an edited book (see Section 8.2)	First citation, start of sentence: Mariampolski (2007:56) explains ... Later citation, end of sentence: ... (Mariampolski, 2007:59).	Mariampolski, H. 2007. Ethnography and observational research. In: Van Hamersveld, M. & De Bont, C. (eds.). <i>Market research handbook</i> . 5th ed. Chichester, West Sussex, UK: John Wiley. Use (ed.) for a single editor or (eds.) for multiple editors.
Conference paper (online) (see Section 8.7)	First citation, start of sentence: According to Goodhue, Lewis and Thompson (2006:3), PLS analysis requires smaller samples than ... Later citation, end of sentence: ... (Goodhue, 2006:10).	Goodhue, D., Lewis, W. & Thompson, R. 2006. <i>PLS, small sample size, and statistical power in MIS research</i> . Paper presented at HICSS '06 - the 39th Annual Hawaii International Conference on System Sciences, Hawaii, 4-7 January 2006:1-10. [Online] Available from: http://0-dx.doi.org.innopac.up.ac.za/10.1109/HICSS.2006.381 [Accessed: 2013-11-13].
Journal article (see Section 8.5)	First citation, start of sentence: Ehrhart, Schneider, Witt and Perry (2011:423) define the construct service climate as ... Later citation, end of sentence: ... (Erhart <i>et al.</i> , 2011:430).	Ehrhart, K.H., Schneider, B., Witt, L.A. & Perry, S.J. 2011. Service employees give as they get: internal service as a moderator of the service climate-service outcomes link. <i>Journal of Applied Psychology</i> , 96(2):423-431. The title of the article is in sentence case and the name of the journal in <i>italics</i> and Title Case.
Reports or other documents downloaded from the Internet (see Section 8.16)	First citation, start of sentence: The ICC/ESOMAR code on market and social research (ESOMAR, 2007:3) specifies that ... Later citation, end of sentence: ... (ESOMAR, 2007:3).	ESOMAR. 2007. <i>ICC/ESOMAR international code on market and social research</i> . [Online] Available from: http://www.esomar.org/uploads/public/knowledge-and-standards/codes-and-guidelines/ICCESOMAR_Code_English_.pdf [Accessed: 2013-11-13].
Web page (see Section 8.15)	First citation, start of sentence: According to the American Association for Public Opinion Research (AAPOR) (n.d.), high quality survey research ... Later citation, end of sentence: ... (AAPOR, n.d.).	American Association for Public Opinion Research (AAPOR). n.d. <i>Best practices for survey and public opinion research</i> . [Online] Available from: http://www.aapor.org/AAPORKentico/Standards-Ethics/Best-Practices.aspx [Accessed: 2013-11-13]. This is an undated web page. Avoid anonymous and/or undated sources as far as possible. Because AAPOR is a very reputable industry association, the use of their undated web page can be justified.