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HOW TO CITE ARTICLES and SCIENTIFIC BOOKS and INTERNET PAGES

by

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1. INTRODUCTION

Citing bibliography correctly in a scientific work is one of the tasks that requires careful learning and fine-tuned attention to detail. There is nothing worse to create a bad impression on a reviewer than an inconsistent, poorly maintained, full of errors and/or incomplete bibliography.

One of the things that is important to bear in mind is that, whenever possible, one should not cite Internet pages that are dubious, or anonymous, or that the year in which they were published is not known. This is called “gray literature”, which has very little scientific content. There are, however, exceptions, as, for example, institutional portals such as the FAO or the World Health Organization, or other credible institutions. Citing Wikipedia articles is, in general, a bad idea, because the quality of the same articles varies greatly. There are, in fact, well-written and cited articles in this virtual encyclopedia, but there are often articles of very low quality, without citations, of a dubious, biased nature and with serious errors. Therefore, Wikipedia should never be a final source of bibliography. Instead, you use databases such as Scopus, Web of Science, PubMed or Google Scholar to find articles you can cite.

Furthermore, there are dozens, if not hundreds of ways to cite bibliography. What's important is to be **consistent**. If a format is adopted, it is important not to use different citation formats for the same bibliographic element.

Another important topic related to scientific work and its citation is the problem of **plagiarism**. Plagiarism is the misuse of text written by someone else without the author of the scientific work giving due credit to the original author. For example, one of the most serious forms of plagiarism is copying and adopting a text as your own without even citing its original source. However, there are other, more subtle forms of plagiarism, such as copying a text word for word from a given scientific work and then citing it. **If this literal copy is not between quotation marks**, this is a form of plagiarism that occurs very frequently in academic work

and deserves extreme condemnation. Furthermore, even if the literal copy is properly cited and enclosed in quotation marks, the literal copy of the text must be limited and well justified. The duty of a well-intentioned author is whenever possible to draw his/her own conclusions from the article (s)he has read and to write down in his/her own words the information (s)he has collected and this includes **definitions**.

2. TYPES OF CITATION / BIBLIOGRAPHIC REFERENCE

There are two main types of citations in scientific works:

- 1) Abbreviated citation/bibliographic reference that occurs in the text itself. For example: "Costa (2011) reported that..."
- 2) List of bibliographic references (normally called "Bibliography"), which is normally found at the end of a scientific work that expands the bibliographic reference cited in the text.

Important notes:

- a) The list of bibliographic references must contain ALL citations made in the text.
- b) The list of bibliographic references must NOT contain any scientific work that was NOT cited in the text. If you used a scientific work, you MUST cite it where you placed the information you took from that bibliographic work.

3. CITATION FORMATS

Although there are hundreds of different formats, as they can vary from magazine to magazine or book to book, these formats can be grouped into two main citation formats:

- 1) APA citation format and derivatives (3.1)
- 2) Citation format by numerical ordering (3.2)

Important Note: The two formats should NOT be mixed. Either you use one, or you use another.

3.1 - APA citation format

3.1.1 - Citation in the text

3.1.1.1 - Citation in the text of a single author

Works using the APA format are typically based on the in-text citation of the author's last surname followed by the year of publication.

The quote can be included in the sentence itself:

Costa (2011) reported that...

Or it can be placed in parentheses. When this is the case, the name of the author from the year is normally separated by a comma:

It was reported that... (Costa, 2011).

Important Note - Please note that the citation in parentheses must appear before the full stop. Furthermore, sometimes the comma between the surname and the year can be omitted. However, if this comma is omitted, no citation should contain commas either, in order to keep citations in a consistent format.

3.1.1.2 - Citation in the text of two authors

Works that use the APA format are normally based on the text citation of the last surname of the 1st author and the last surname of the 2nd author followed by the year of publication. To join the two surnames, the letter "&" is normally used. The conjunction "and" is used less frequently in Portuguese, although it is common to use the conjunction "and" when writing in English.

Once again, the quote can be included in the sentence itself:

Costa & Gomes (2011) reported that...

Or it can be placed in parentheses. When this is the case, the surnames of the authors of the year are separated by a comma:

It was reported that... (Costa & Gomes, 2011).

3.1.1.3 - Citation in the text of three or more authors

et alli (which literally means "and others") should be used when you cite a work with three or more authors. This is often abbreviated to *et al.* Note that this abbreviation, like all abbreviations, contains a full stop after the "l". However, to save space, some magazines recommend omitting this full stop. What's important is to be consistent.

Once again, the quote can be included in the sentence itself:

Costa *et al.* (2011) reported that...

Or it can be placed in parentheses. When this is the case, the surname of the author of the year is separated, followed by *et al.* by a comma:

It has been reported that... (Costa *et al.*, 2011).

Important Notes - *et al.* must always be written in italics in Portuguese, since it is a foreign (Latin) phrase. Sometimes in English it is written *et al.* in normal font. There are also certain journals that use citations with *et al.* if the number of authors is greater than three. In other words, they require that the surname of all authors be written up to a limit defined by the journal itself. However, the vast majority of journals ask that *et al.* be used when a bibliographic reference has 3 or more authors.

3.1.1.4 - Order of author citations in the text

When a citation has more than one author, the order in which the authors are cited must be the same as that found in the publication itself. In other words, the 1st author must be cited first and so on.

When two or more bibliographic references are cited in the same place according to the APA format, they must be cited in ascending chronological order and the various references must be separated by periods and commas:

It has been reported that... (Gomes & Gomes, 2009; Costa *et al.*, 2011).

Note - There is, however, a tendency to contradict this rule of the original APA format in that certain scientific journals prefer that citations be in ascending alphabetical order. What is important, once again, is to adopt one of the methods and be consistent.

If there are two references in a given work with the same year, cite in alphabetical order by the first author's surname:

It has been reported that... (Costa *et al.* , 2011; Gomes & Gomes, 2011).

In case of a tie, use the surname of the 2nd author, 3rd, etc., in alphabetical order, if any:

It has been reported that... (Costa & Gomes, 2011; Costa & Ribeiro, 2011).

3.1.1.4 - Citations in the text of authors published in the same year

If there are two or more references in a given work with the same surname(s) and year, put a lowercase letter after the year, starting with "a", followed by "b", etc.:

It has been reported that... (Gomes & Gomes, 2009a). In the same year, Gomes & Gomes (2009b) stated that...

3.1.2 - References in a reference list (so-called Bibliography at the end of the scientific work)

When compiling a bibliographic list of all citations in the text according to the APA format, it is necessary to follow the following rules in descending order of importance :

a) The bibliographic list must be made in ascending alphabetical order of the first author's surname;

b) in case of a tiebreaker, use the 2nd author's surname and so on, if they exist. If there is no 2nd or 3rd author to break the tie, this reference must be placed before the others that require a tiebreaker and that have more authors.

c) if there is more than one reference with the same first author, place the references in ascending chronological order.

d) the use of the abbreviation *et al.* is not permitted in a reference on a reference list at the end of the scientific work. If the article has 50 authors, all of these authors must be included.

Costa AS (2009)...

Costa AS (2010)...

Costa AS & Bourseau CH (2011)

Costa AS & Gomes AJG (2010)...

Gomes AJG & Gomes AF (2007)....

3.1.2.1 - Bibliographic reference of an article in a journal

The bibliographic reference of a citation to an article must have the following elements, in general, in this order, although this may vary from journal to journal:

1. Last name of the 1st author

2. Abbreviations of the remaining names of the 1st author

Important notes:

a) Separating the surname from the abbreviations of the remaining names can be done with a comma or without a comma, in which the abbreviations can include periods or not:

Gomes, A.S.

or

Gomes, A.S.

or

Gomes AS

or

Gomes AS

b) The same pattern must be repeated for the remaining authors:

Gomes, AS, Costa, AD

or

Gomes AS, Costa AD

although sometimes only the surname and abbreviations of the 1st author are reversed:

Gomes, AS, AD Costa, BH Manfred

or put an & before the last author if there is more than one:

Gomes, AS, Costa, AD & Manfred, BH

3. Year of the article (generally in parentheses followed by a period; sometimes the year is placed before or after the magazine volume without a period)

4. Title of the article ending with a period.

5. Title of the journal (in *italics*)

Important Note - Sometimes the title of the journal is separated from the following element with a comma.

6. Journal volume (in **bold** without the abbreviation "Vol." before)

7. Sometimes the journal number is placed in parentheses, but in general this information can be omitted. If omitted, it should not be included in any reference for consistency reasons.

8. Home page and end page of the article separated by a dash and preceded by a comma or colon and followed by an optional full stop paragraph.

All of this results in a reference in the bibliographic list that has this format:

Gomes AS, Costa AD (2011) A survey of butterflies in Algarve. *J. Entomol.* **45** :12-34.

or

Gomes AS, Costa AD (2011). A survey of butterflies in Algarve. *Journal of Entomology* , **45** :12-34.

Important note - Sometimes the title of journals is abbreviated (the 1st example). If you don't know how to do it, don't abbreviate the name of the journals and write the title of the journal in full. However, in general the rules for abbreviations are these:

Words ending in -eering *generally* omit this suffix (e.g., *Bioengineering* is abbreviated to *Bioeng* .)

Words ending in -istry *omit* this suffix (e.g., *Chemistry* is abbreviated to *Chem.*, *Biochemistry* -> *Biochem.*).

Words ending in -ogy this suffix is omitted (e.g., *Biology* -> *Biol.*, *Immunology* -> *Immunol.*, etc.)

Advanced -> *Adv.*

American -> *Am.*

Canadian -> *Can.*

Energy -> *Energ.*

European -> *Eur.*

Experimental -> *Exp.*

Journal -> *J.*

Photosynthesis -> *Photosynth.*
Research - > *Res.*
Review -> *Rev.*

Thus, if a journal is called *European Journal of Phycology*, the abbreviated name of the journal would be *Eur. J. Phycol.*

3.1.2.2 - Bibliographic reference of a book

The bibliographic reference of a citation from a book must have the following elements, in general, in this order, although this may vary from journal to journal:

1. Last name of the 1st author
2. Abbreviations of the remaining names of the 1st author

Important Notes: The separation rules between the 2 previous elements are the same as in the articles (see previous section).

3. Year of the book (generally in parentheses followed by a period; sometimes the year is placed before or after the magazine volume without a period)

4. Title of the book (in *italics*) ending with a full stop (and edition number if this information exists)

5. If applicable, volume of the book (in normal font with the abbreviation "Vol." followed by a comma).

6. Publisher (followed by a comma)

7. City where the publisher is located, ending with an optional full stop.

All of this results in a reference in the bibliographic list that has this format:

Gomes AS, Costa AD (2011) *A survey of butterflies in Algarve*. Vol. 12, Springer, NY.

3.1.2.3 - Bibliographic reference of a chapter of a book

The bibliographic reference of a citation from a book chapter must have the following elements, in general, in this order, although this may vary from journal to journal:

1. Last name of the 1st author
2. Abbreviations of the remaining names of the 1st author

Important Notes: The separation rules between the 2 previous elements are the same as in the articles (see section 3.1.2.1).

3. Year of the book (generally in parentheses followed by a period; sometimes the year is placed before or after the magazine volume without a period)

4. Chapter title (normal font) ending with a period.

5. Title of the book (in *italics*) preceded by *In* (in *italics*) ending with a period.

6. If applicable, the name of the editor(s) (not the publisher, the house that publishes the book; this comes later in point 9.) of the book followed by the abbreviation in parentheses (Ed.) or (Eds.) if you are more than one editor.

7. If applicable, volume of the book (in normal font with the abbreviation “Vol.” followed by a comma).

8. Initial page and final page of the chapter separated by a dash and preceded by a comma. Sometimes this element is placed last.

9. Publisher (followed by a comma)

10. City where the publisher is located (followed by a comma if there is one more element; if there is not, put a period at the end of the paragraph or omit any punctuation)

All of this results in a reference in the bibliographic list that has this format:

Gomes AS, Costa AD (2011) Red butterflies. *In A survey of butterflies in Algarve* . Bouveau H (Ed.), Vol 12, 23-54, Springer, NY.

3.1.2.4 - Reference to a website

1. Last name of the 1st author

2. Abbreviations of the remaining names of the 1st author

Important Notes: The separation rules between the 2 previous elements are the same as in the articles (see section 3.1.2.1).

3. Year of page viewing.

4. Page title (normal font) ending with a period.

5. URL of the page with the respective protocol (http or https or ftp, etc.)

6. Date the page was viewed in square brackets preceded by “Accessed on:”

All of this results in a reference in the bibliographic list that has this format:

Gomes AS, Costa AD (2011) Red butterflies. <http://www.butterflies.com/> [Accessed on: 21.08.2011 12:12].

3.2 - Numerical citation format

3.2.1 - Citation in the text

Numerical citation in the text is normally done with numbers in square parentheses or, more rarely, in curved parentheses. Even more rarely, in scientific articles numbers are used in exponents (*superscript*) without being enclosed in parentheses.

The authors said that... [1]
The authors sad that... (1).
The authors said that... ¹.
Costa et al. [1] said that...

When citing more than one article, separate the numbers by commas and place the numbers in ascending numerical order:

The authors said that... [1,2,4].

When citing articles with contiguous numbers, a dash is placed to separate the lower numbered article from the higher numbered article.

The authors said that... [2-6].

Finally, you can combine both styles:

The authors said that... [1,4-6].

Numerical citation is generally done in order of citation. In other words, article 1 must be the article cited for the first time in the text and so on. However, there are magazines that request that the numbering be done in alphabetical order.

3.2.2 - References in a reference list (so-called Bibliography at the end of the scientific work)

The rules for organizing the reference list are the same as those referred to in 3.1.2, with the following exception:

The article number must be placed before each reference and **in order of citation** (unless it is necessary to place the bibliographic list in alphabetical order):

1. Gomes AS, Costa AD (2011) Red butterflies. *In A survey of butterflies in Algarve* . Bouveau H (Ed.), Vol 12, 23-54, Springer, NY.
2. Gomes AS, Costa AD (2011) *A survey of butterflies in Algarve* . Vol. 12, Springer, NY.

Note - In this example it was not necessary to place a and b after the year as the articles are already distinguished from each other by their numbering.