

Citation Guide for Business

Based on the *Chicago Manual of Style*, 16th ed.

Fall 2017

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Part One: Introduction

Virtually all academic, government and business reports require some form of referencing to acknowledge the source(s) of the ideas, facts and quotations being presented.

An assignment will typically include your own ideas and words along with the thoughts and text of others. Citing distinguishes your contributions from those of other authors and gives them proper credit. If you do not identify the sources that have influenced or appeared in your paper (even if unintentional), you have committed plagiarism, a serious offence that can lead to penalties such as a failing grade or expulsion from your school. Moreover, citing your sources enables readers to locate, verify and consult the sources used thereby supporting further study and analysis.

Your instructor expects you to be both precise (in terms of format, punctuation and presentation) as well as consistent. DeGroote School of Business students are expected to produce two sets of references in their papers: a list of endnotes and a formal bibliography (which appears at the end of the paper).

Citation Style

This Citation Guide is based on the *Chicago Manual of Style*, 16th edition. We have followed it as closely as possible; however, due to the unique nature of some of the material used by some of the courses in the DeGroote School of Business, some entries have been adapted to best suit the material and the needs of our students and instructors.

Order of Elements in Paper

The following is the correct order of elements for your paper:

- Title Page
- Contents
- Text (also known as Body)
- Appendix(es)
- Notes
- Bibliography

Each element begins on a separate page. Review your paper guidelines for the required elements. Not all elements (e.g., Appendixes) will be present in every paper.

Headings and Subheadings

The following elements should have the headings bolded and centred at the top of the page: Contents, Appendix (see this section for title details), Notes, and Bibliography. You do not need to start the Text with a heading that states the title of your paper. This title, which communicates

your paper's focus, should be stated on the Title Page (e.g., Team Contract).

Like element headings, it is good practice to bold subheadings. It is up to you to decide where to place subheading titles (e.g., left justified or centred on the page). Just be consistent. Don't forget to include any required subheadings - as stated in the paper's guidelines - as they should be included both in the Text as well as in the Contents.

Consistency also applies to underlining. If you underline the first element heading (e.g., Contents), then you need to do so for the rest of the element headings. This is also the case for subheadings.

Double-space (as a minimum) after the start of the element's heading before you begin with the page information. The number of spaces after the element heading and the page information should be consistent throughout the paper. For example, if you have four single lines after the Contents heading, this also needs to be the case for the rest of the element headings.

You do not need to add an extra line of space after each subheading. For example, if your paper requires 1.5 line spacing, include only this after the subheading. It is a good practice to include an extra line (e.g., 1.5 line spacing if this is your paper requirement) between subheading sections. This will differentiate one section from another.

Page Numbers

The Title Page is the first page of the paper and it is not numbered. This is followed by the Contents, which is paged using Roman numerals, starting with ii (i.e., ii, iii...). The Text, Appendixes, Notes, and Bibliography are all numbered consecutively using Arabic numbers, starting with 1 (i.e., 1, 2, 3...).

For the page number placement, select one position (e.g., top right) and then be consistent for the rest of the paper. The page number should reflect all formatting requirements (e.g., font size).

Title Page

Refer to the paper guidelines for the Title Page content requirements. The title should communicate your paper focus (e.g., Company Overview).

Contents

The Contents at the beginning of this Citation Guide will give you an example of the correct format to use for this element. Include the title and *beginning* page number of each section or subheading. The list should appear in the order that it appears in the Text. Titles should be placed on the left hand side of the page while page numbers are placed on the far right. Continuous dotting (use a software program to create this page to ensure consistency) should separate titles and page numbers. Remember to follow formatting requirements (e.g., line spacing).

When listing appendixes (in their numerical or alphabetical order, such as 1, 2, 3 or A, B, C), do not forget to include their titles (e.g., Appendix A – Y2017 Sales). Any tables or figures in the Text, to be outlined shortly, also require a title. Do not forget to include these titles in the Contents.

Text

Communicate required information in the Text (also known as the Body) and within the required page limit. This includes all of the required sections such as the Introduction and Conclusion. You should review all of the formatting requirements (e.g., subheadings, line spacing, etc.) listed in your paper guidelines to be sure that your document is flawless.

Be consistent with your paragraph format. The first line of each paragraph can be indented via your tab key for each paragraph or you can left-justify the paragraphs and insert a single line between paragraphs to separate them.

General Points:

- When a book, journal, magazine or newspaper title is mentioned in the Text, italicize it (e.g., In *Forbes*, Smith outlined his marketing plan ...).
- Leave one space after all punctuation which includes periods, colons, commas, semicolons, and question marks. One space is also left following the endnote number. For example,

Statistics indicate that there has been a recent decline in the number of fast food chains being created.¹ This may be a result of the recent trend toward healthier eating.
- If a sentence ends with an abbreviation, use only one period (e.g., Inc. not Inc..).
- In most numerals of one thousand or more, commas are used between three groups of digits, counting from the right (e.g., 32,876). No commas are used in page numbers (e.g., on page 2567), addresses (located at 1280 Main Street W.), and years (though years of five digits or more do include the comma) (e.g., 35,000 BP and 5000 BP).
- Write out whole numbers from one through one hundred (e.g., ninety-nine plant locations), round numbers (e.g., three hundred employees), and any number beginning a sentence. For other numbers, numerals are used (e.g., 543 or 6,893).
- Very large numbers or monetary amounts can be expressed by a mixture of numerals and spelled out numbers (e.g., C\$3.4 million, 2 billion dogs, US\$56.8 billion, etc.). Note the correct currency code and its placement for your paper.
- Percentages are always given in numerals. The number should either be followed by the word percent (e.g., 45 percent) or by the symbol % (e.g., 45%).

- Times of day in even, half, and quarter hours are usually spelled out in words (e.g., five o'clock, ten thirty, half past three, and quarter to four). Numerals are used (with zeros for even hours) when exact times are emphasized (e.g., 7:11 a.m. [not am or AM]).

Appendixes

The appendix must comply with all formatting requirements communicated in your course (e.g., one inch margins) and this Citation Guide. You will lose marks if you use appendixes incorrectly. If you are unsure whether your research should be in an appendix or if an endnote is sufficient, ask the staff at the Innis Library Service Desk or your instructor.

Items are placed in an appendix if they disrupt the flow of the paper. Appendixes may contain:

- long lists of information;
- survey, observation, and focus group data;
- graphs, charts, tables, calculations and their formulas, etc. that you have formulated; and
- explanations that are not essential parts of the text (e.g., brochures, regulations, etc.), but are helpful for further clarification.

After the Text, the appendixes should be arranged (numerically or alphabetically) in the order that they are referred to in the text.

All appendixes need to be referred to and briefly summarized in the Text. For example,

The observation results summarized in Appendix A support the group's hypothesis that health benefits were the most critical factor when purchasing vegetables.²

Note that when referring to an appendix in the Text, a superscripted (placed slightly above the text) endnote number must **always** be placed at the end of the sentence after the punctuation as this is the citation reference for your work. This endnote should include the source(s) cited in your appendix. The absence of this endnote number is considered plagiarism (i.e., academic dishonesty).

Each appendix starts with its own page; do not put two appendixes on the same page. The heading title must be centred and bolded. Each appendix should be identified by number or by letter (e.g., Appendix 1 or Appendix A) and by its title at the top of the page (e.g., Appendix A - Y2017 Sales). Remember to include the appendix title on the Contents page.

IN ADDITION, a source note - that states the complete endnote citation - must be placed near the bottom of the appendix page. The source note is introduced by *Source:* or *Sources:* (if you are using Citation to Several Sources in One Endnote). Note that this is not bolded, is in italics, and is followed by a colon and then the complete citation. Do not indicate the endnote number anywhere. Include the full citation on the one page. For example,

Source: Linda Holbeche, *Aligning Human Resources and Business Strategy* (Oxford: Butterworth-Heinemann, 2001), 10.

Review Part Five for an example of an Appendix page that incorporates information discussed throughout these pages.

Tables and Graphs in the Text

Tables - which include grid lines and column titles - and graphs can be placed in the Text. They should follow all paper formatting guidelines (e.g., font size and line spacing). Consider the following steps when incorporating this work in the text.

1. Include an introductory sentence to the content.
2. Follow this with a bolded and centred title that will also appear on the Contents page as an indented line under the appropriate subheading.
3. Next, incorporate the content in a table - with grid lines and column titles - or a graph.
4. Include a single-line space under the table and state the full endnote citation.

Similar to an appendix citation, the citation under the table begins with *Source:* (or *Sources:* if there are two or more sources). Include the full endnote citation and follow citation requirements (e.g., single-line spacing, the URL is broken at the appropriate place, etc.). If there is more than one source, follow the Citation to Several Sources in One Endnote format (to be discussed soon). Do not include an endnote number.

The example below incorporates the information stated above (e.g., a required introductory sentence, table title, the left-justified endnote citation under the table, etc.).

The following table summarizes the net income for the Canadian National Railway Company from 2014 to 2016.

Table 1: Net Income for the Canadian National Railway Company (2014-2016)

Year	2014	2015	2016
Net Income (C\$ billions)	\$3.17	\$3.54	\$3.64

Source: Canadian National Railway Company, "Innovation in Motion: 2016 Annual Report," Canadian National Railway Company, 54, accessed June 6, 2017, <https://www.cn.ca/-/media/Files/Investors/Investor-Annual-Report-Archive/English/2016-CN-Annual-Report.pdf>.

Endnotes

Endnotes serve two main purposes. Most often, they cite the precise source(s) (i.e., the actual page number) of the facts, opinions or quotations appearing in the Text. In other cases, they provide additional detail or commentary on the ideas presented within the main text. Use Arabic numbers for your endnotes. Endnotes are numbered continuously. Consequently, there is only one endnote 1, 2, 3, etc. in a paper.

The endnote number is usually (see EXCEPTIONS below) placed at the end of the sentence being cited - after the period, question mark, or exclamation mark. For example,

Chocolate bar sales are expected to increase by 35% in the next six months.³

Keep in Mind:

- The number is not placed in brackets.
- No punctuation follows the number.
- The reader will assume that only the single sentence preceding the endnote is being cited, not the entire paragraph or the last two or three sentences.

EXCEPTIONS:

1. If you are quoting a **long piece of text verbatim** (one hundred words or more or at least six lines or a whole paragraph), it should be blocked. A block quotation starts on a new line and is single spaced. Indent the **WHOLE** (new) paragraph to indicate that multiple sentences are being cited, then put a single endnote number at the end of the paragraph. No quotation marks are used. An extra line space should immediately precede and follow a blocked quotation. For example,

According to Philip Kotler:

Over the past 60 years, marketing has moved from being product centric (Marketing 1.0) to being consumer-centric (Marketing 2.0). Today we see marketing as transforming once again in response to the new dynamics in the environment. We see companies expanding their focus from products to consumers to humankind issues. Marketing 3.0 is the stage when companies shift from consumer-centricity to human-centricity and where profitability is balanced with corporate responsibility.¹

2. When quoting a **short piece of text verbatim** (i.e., the same words used), quotation marks are necessary. Punctuation is placed before the quotation marks and the endnote number immediately follows the quotation marks. For example,

Kotler notes that “over the past 60 years, marketing has moved from being product centric (Marketing 1.0) to being consumer-centric (Marketing 2.0).”²

3. If the work is **paraphrased** (your words, but someone else's ideas), no quotations are necessary. However, an endnote must be supplied or else it is considered plagiarism.

By the start of the twenty-first century, the emphasis in marketing had shifted from products to consumers.³

4. If you wish to cite a **complex multi-sentence thought from the same source**, introduce your topic with a statement such as the following:

Jones notes five key factors affecting candy sales: First, brand recognition plays a role. Second, economic factors such as ... Finally, packaging has a significant impact.⁴

You will list your endnote citations in the Notes element. Remember to bold and centre this element heading. The actual list of endnotes are single-spaced **within** entries and double-spaced **between** entries. Do not be misled by the term double-spacing. It visually means that there is one single-line of white space between entries, not two lines. Be aware that internationally-purchased programs (e.g., a computer purchased in China) do not always correspond with North American spacing standards. You will need to ensure this consistency.

Review Part Five for an example of a Notes page that incorporates information discussed throughout these pages.

Formatting of Endnotes

Endnotes are typically formatted in one of two ways. Choose one of these methods and be consistent.

(1) Indent the first line of each endnote the same number of spaces as the paragraph indentation in the Text (e.g., five spaces). The note number rests on the same line (not slightly above as in the Text), and is followed by a period. Leave one space between the period following the number and the actual citation. Second and subsequent lines of the citation appear flush up against the left hand margin. For example,

1. Linda Holbeche, *Aligning Human Resources and Business Strategy* (Oxford: Butterworth-Heinemann, 1999), 10.

(2) The endnote number is indented the same number of spaces as the paragraph indentation in the text (e.g., five spaces). If you do not indent the first line of each paragraph, you need to still indent the first line of each endnote citation. The note number is superscripted (slightly above the text), without a period. The citation begins immediately after the number. Second and subsequent lines of the citation appear flush against the left hand margin. For example,

¹Linda Holbeche, *Aligning Human Resources and Business Strategy* (Oxford: Butterworth-Heinemann, 1999), 10.

Subsequent or Repeating Endnotes

The first citing of a work should be in complete form, incorporating all facts of publication. Subsequent references to this work are made in shortened form. Generally, only the surname of the author and key words from the main part of the title are included. Examples for each document type will follow in this Guide.

Keep in Mind:

- Titles with less than five words should not be shortened.
- The order of words should not be altered.
- You must use this shortened form, when applicable.

Ibid.

Ibid. (from Ibidem which means “in the same place”) is used when references to the same work **immediately** follow each other, and **may** differ only in terms of page number. When applicable, you must incorporate Ibid. If the work refers to the same page, the citation simply reads Ibid. Note that the word Ibid. is followed by a period. If the citation refers to a different page of the same work, use Ibid. followed by a comma and the new page number (e.g., Ibid., 8.). If the item you are referencing is on a web page that is not numbered, simply use Ibid. (NOT Ibid., World Wide Web).

Annotations: Adding Explanations, Clarifications to Endnotes

Sometimes additional information is required to explain or clarify the use of a particular source in a paper without cluttering up the text itself. These clarifications are called annotations. You need to include an annotation if you have several sources in one endnote (to be discussed next).

Annotations typically follow the formal citation. A period usually separates the citation from the commentary. For example,

Statistics Canada, *Market Research Handbook 2006* (Ottawa: Statistics Canada, 2007), 174. Extracted the total number of cars sold and the average price per car from this table to calculate a rough estimate of the total value of all cars sold.

Citation to Several Sources in One Endnote

Avoid using more than one note reference in a single location (such as ^{5,6}). If two or more facts are used in a sentence and come from different sources, a single endnote is used. For example,

Despite lower interest rates and property taxes, there was a decrease in the number of homes purchased in the past five years.¹

In your endnote citation, separate the full citation for each source by a semicolon. The citations should be in alphabetical order by author (or title if no author). For clarity, include an annotation at the end of your citation indicating the relationship between or reason for the multiple references. Two examples are as follows:

Economist Intelligence Unit, "Country Report: Canada," May 2008, accessed June 12, 2016, Economist Intelligence Unit; Statistics Canada, *Market Research Handbook 2008* (Ottawa: Statistics Canada, 2009), 78. Both sources were needed to support a five-year trend.

2012 Canadian Key Business Directory (Mississauga: D&B Canada, 2011), 10-11; *Scott's Directories: Ontario Manufacturers Directory 2012* (Toronto: Scott's Directories, 2011), 2-350; *Scott's Directories: Western Industrial Directory 2012* (Toronto: Scott's Directories, 2011), 2-497. The list of companies is compiled from entries in several directories.

Be aware that each *Scott's Directories* volume should be cited separately and that 2-350 is one page number for this particular source.

Keep in Mind:

- When a citation involves multiple sources, repeat the full citation in subsequent endnotes as there is no shortened form for a multiple sources endnote.
- If you subsequently use only one of the sources contained in the "Citation to Several Sources in One Endnote," you can use the shortened form for that individual source in the Notes.
- If the citation following the "Citation to Several Sources in One Endnote" is the same, use *Ibid.*
- Be sure to individually cite these sources in the Bibliography.

Multiple Pages from the Same Work

When a very large number (over ten) of individual pages are being cited in the same work, it's permissible to just note [multiple pages] in your endnotes instead of a long list of page numbers. We recommend you put the word in square brackets. For example,

2013 Canadian Key Business Directory (New York: Mergent Business Press, 2013), [multiple pages].

Full-Text Documents in PDF and Web (e.g., HTML) Formats

If an online publication or document is available as a PDF file (**P**ortable **D**ocument **F**ormat), include the page number(s) in the endnotes (i.e., the original page numbers found on the document rather than the numbering provided by the software (i.e., Adobe Acrobat)). If an online publication or document is available as a web-based or HTML (**H**ypertext **M**arkup **L**anguage) file, use "World Wide Web" in the endnotes.

Bibliography

The Bibliography is an element that begins on its own page. Remember to bold and centre this element heading. A bibliography appears at the end of a research paper and lists all the sources consulted to write the paper, regardless if you have quoted this research in the Notes. This can include your textbook.

A bibliography is arranged alphabetically by the author's surname. If a source has no author, alphabetize by the first word in the title. For example, if the article "Brand Leadership" has no author, alphabetize it under B. If a title begins with an article (e.g., A or The) use the first significant word in the title for alphabetization. Titles beginning with numbers (e.g., *2013 Scott's Directories*) fall at the beginning of the bibliography, sorted first by the number and then by the rest of the title.

Bibliographies are single-spaced **within** entries and double-spaced **between** entries. Do not be misled by the term double-spacing. It visually means that there is one single-line of white space between entries, not two lines. The first line of a bibliographical entry is placed at the far left margin with all subsequent lines of an entry indented, based on your tab key setting (e.g., five spaces). Note that this is the opposite of endnote citations.

You must incorporate Primary Sources (listed first) and Secondary Sources subheadings in your paper. These subheadings must also appear on the Contents page as individually indented lines under the Bibliography line. If you incorporate only secondary sources, you do not need to include the Primary Sources subheading.

The author can be an individual or an entity, such as a corporation. If a bibliography includes more than one work by the same author - regardless of the research type - the name is given for the first entry, and an eight-space line (the underscore key struck eight times) ending with a period takes its place in subsequent entries. These entries are arranged in alphabetical order by title. For example,

Godin, Seth. *Purple Cow: Transform Your Business By Being Remarkable*. New York: Portfolio, 2003.

_____. *Tribes: We Need You To Lead Us*. New York: Portfolio, 2008.

If the name is followed by a title (e.g., ed. for editor) the underscore is followed by a comma. For example,

_____, ed. *Tribes: We Need You To Lead Us*. New York: Portfolio, 2008.

When entries with or without authors begin identically, list them in letter-by-letter alphabetical order according to the first word in each entry and only use the underscore when the same author or editor *immediately* precedes an entry.

“Sun Life Financial Inc.” Allen H. Gould Trading Floor. Accessed July 29, 2016, Bloomberg.

Sun Life Financial Inc. “At a Glance Brochure.” Toronto: Sun Life Financial Inc., 2016.

_____. “Consolidated Financial Statements and Notes: Annual Report 2015.” Sun Life Financial. Accessed July 29, 2016. https://cdn.sunlife.com/static/global/files/Annual%20reports/2015/6_SLF_English_Consolidated_Financial_Statements_and_Notes.pdf.

_____. “Organizational Resilience: 2015 Sustainability Report.” Sun Life Financial. Accessed July 29, 2016. https://www.sunlife.com/Global/Corporate+responsibility/Sustainability/Organizational+resilience?vgnLocale=en_CA.

Review Part Five for an example of a Bibliography page.

Differences Between Notes and Bibliography

1. The Bibliography element includes a single entry for each work, no matter how many times it’s been cited in the paper. The Notes element may cite a single work many times, but each reference would reflect a new endnote number.
2. A Bibliography does not refer to specific pages of a work, while Notes do.
3. Bibliographies are arranged in alphabetical order by the author’s surname. Notes are arranged in the numerical order that they are referred to in the Text.
4. The first line of each entry in a Bibliography is flush to the left hand margin, with subsequent lines indented. The first line of each citation in the Notes is indented, with subsequent lines flush to the left margin.
5. In a Bibliography, the first listed author’s name is inverted (i.e., surname first e.g., Smith, Mary). In Notes, the author’s given name appears first (e.g., Mary Smith).
6. All major elements of an entry in a Bibliography are separated by periods. Elements of a citation in the Notes are separated by commas.

General Points for Notes and Bibliographies

The following points are general formatting guidelines that pertain to citations appearing in both Notes and Bibliographies.

Authors-Anonymous

If the work's author is specifically cited as "Anonymous", the word Anonymous is included in the citation in the place of a name. **If the work does not indicate an author and/or the word Anonymous does not appear, begin the citation with the work's title.**

Letter Case

Titles noted in citations are usually capitalized headline-style. Headline case applies to all titles for all source types. For example, if a newspaper article uses a mix of upper-case and lower-case letters (e.g., "Profits shrink as banks face regulation, slow growth"), they should all be changed to headline case (e.g., "Profits Shrink as Banks Face Regulation, Slow Growth"). Capitalize the first and last words in titles and subtitles, and capitalize all other major words *except* a, an, and, as, at, but, by, for, in, nor, of, on, or, the, to, & with.

Spacing and Punctuation Within Citations

Leave a single space after a period, colon or semicolon within endnotes or bibliographic citations.

If a citation element ends with an abbreviation, use only one period (e.g., Ltd. not Ltd..).

When putting double quotation marks around a title, the right sided quotation mark is generally preceded by a comma for endnote citations and a period for bibliographic citations. Examples are shared throughout this Guide. But, if the article title ends in a question mark or exclamation point, do not include the comma or period preceding the right sided quotation mark. In other words, do not include any other punctuation before or after the quotation mark. For example,

Victor Zarnowitz and Dana Lee, "Can Business Cycles Still Be Dated by Monthly Coincident Indicators Alone?" *Business Cycle Indicator*, March 2005, 3-4.

Missing Information

In many cases, not all of the recommended publication elements are evident on the work being cited. Some journals don't have volume numbers, while some web pages don't include dates of creation, personal authors or even obvious titles. If the author is noted as Anonymous, see previous page. Otherwise, use square brackets to indicate missing information as illustrated below.

General rules are:

No Author	start the citation with the work's title
No Date	[n.d.] or omit (especially for online sources)
No Place	[n.p.]
No Title	[Untitled]

If the information is not obvious, but can be implied, include it in the citation, but with a question mark and within square brackets. For example, [2016?]. If other elements are missing (e.g., no publisher, no pagination) and cannot be implied, do not include the information.

DOIs (Digital Object Identifiers) and URLs (Uniform Resource Locators)

When citing an online source, a DOI, a stable URL (i.e., a web address that consistently works from any location) or a database name should be included in your endnote and bibliographic citations.

A DOI is a unique and permanent ID that provides persistent and reliable access to a digital object such as an online article. For example, the DOI 10.1007/s11002-011-9147-0 belongs to an online journal article entitled “All That Glitters Is Not Gold,” by Yael Steinhart published in the March 2012 issue of *Marketing Letters*. A DOI (if available) is typically noted on the first few pages of an online source. When a DOI is appended to the end of this URL - <http://dx.doi.org/>, the resulting link will point directly to the specific item (e.g., <http://dx.doi.org/10.1007/s11002-011-9147-0>). If a **DOI** is available for an online source, it **should be used in your citation**.

For online sources with **no DOI** specified, **use the most direct, complete and stable URL** you can find for your citations. For freely available content on the Internet (e.g., government and company web pages), you can usually use the URL that appears in the web browser’s address bar. For online content contained in a database, only include a URL if the database provides a stable link to the item being cited (usually noted as a permalink or document URL). Database URLs that appear in a web browser’s address bar are not always reliable or stable so they should not be used. If no stable URL is specified, include the name of the database at the end of the citation (e.g., Factiva).

If **both** a DOI and stable URL are **available** for an online source, the DOI is preferred and is noted at the end of the citation (see Article from an Online Journal for an example). If **both** a DOI and stable URL are **unavailable**, include the name of the database or site in your citation (see Part Three of this Guide for examples).

DOIs and URLs follow the flow of the citation and do not automatically start on a separate line. When a DOI or URL has to be broken at the end of a line, the break should be made as follows:

after a	colon	:	but before a	single slash	/	underscore	_
	double slash	//		tilde	~	question mark	?
				period	.	number sign	#
				comma	,	percent symbol	%
				hyphen	-	equal sign	=
						ampersand	&

A hyphen should never be added to a DOI or URL to denote a line break, nor should a hyphen that is part of a DOI or URL appear at the end of a line.

URLs appearing in citations should not be underlined. Microsoft Word automatically converts URLs to active links. To deactivate a link, right-click on the URL and select **Remove Hyperlink**.

Access Dates

When access dates are included in a citation, they should immediately *precede* the URL or DOI, separated from the surrounding text by commas in the endnote form and periods in the bibliographic form.

If you visit an online source (e.g., a web page or database) more than once and the content does not change, use one date (the most recent date) for the access date. If the information has changed since your last visit, a new endnote will be required.

Sources with No Citation Examples

If you cannot find an example of the type of material you want to cite, and if you have exhausted other resources (including the *Chicago Manual of Style*), then include all of the details in your citation that would help a reader find the source easily. To help with formatting, consult an existing citation example (e.g., books or web pages) and modify the template/form to accommodate your source.

Citation Tools

Citation management software, such as *Mendeley* or *Zotero*, can help automate the task of formatting citations, however, the citations generated by these tools may not be completely accurate. The same holds true for websites and databases that provide preformatted citations in a variety of styles. All citations in your paper should be thoroughly reviewed for consistency, accuracy, and completeness according to the guidelines recommended in **this** Citation Guide.

Part Two: Citation Examples for Selected Secondary Sources

Advertisements

Include the company name, describe the advertisement or include the most prominent words from the ad, title of publication, date of publication and page. For multimedia advertisements (e.g., television, radio, etc.) indicate the form of the ad along with the date that it was viewed or heard.

Endnote Form (First Citing):

Nestle Inc., "Parents Stealing the Smarties From Their Children's Halloween Candy Bags," television advertisement, viewed October 31, 2016.

Subsequent Endnote Form:

Nestle, "Parents Stealing Smarties," television advertisement.

Bibliographic Form:

Nestle Inc. "Parents Stealing the Smarties From Their Children's Halloween Candy Bags."
Television advertisement. Viewed October 31, 2016.

Allen H. Gould Trading Floor Data

Bloomberg

Endnote Form (First Citing):

“Coca-Cola Co.,” Allen H. Gould Trading Floor, accessed March 8, 2017, Bloomberg.

Subsequent Endnote Form:

“Coca-Cola,” Bloomberg.

Bibliographic Form:

“Coca-Cola Co.” Allen H. Gould Trading Floor. Accessed March 8, 2017, Bloomberg.

Thomson Reuters Eikon

Endnote Form (First Citing):

“China’s Inflation Rate,” Allen H. Gould Trading Floor, accessed February 6, 2017, Thomson Reuters Eikon.

Subsequent Endnote Form:

“China’s Inflation Rate,” Thomson Reuters Eikon.

Bibliographic Form:

“China’s Inflation Rate.” Allen H. Gould Trading Floor. Accessed February 6, 2017. Thomson Reuters Eikon.

Annual Reports (Printed)

Include company name, title and subtitle (in italics), place of publication, publisher, date of publication, and page number(s) for endnotes.

Take information as it appears on the front cover and inside page. Use a question mark and put square brackets around information that is inferred from the document, but isn’t evident on the cover or inside page. For example, the year of publication is often inferred from the letter to the shareholders.

Annual reports often include a catchy title on the cover in addition to the words “Annual Report” and a date. Include both portions and separate by a colon.

Endnote Form (First Citing):

Loblaw Companies Ltd., *Innovate, Execute, Optimize: 2015 Annual Report – Financial Review* ([Brampton: Loblaw Companies Ltd., 2016?]), 6-9.

Subsequent Endnote Form:

Loblaw, *2015 Annual Report*, 20.

Bibliographic Form:

Loblaw Companies Ltd. *Innovate, Execute, Optimize: 2015 Annual Report – Financial Review*. [Brampton: Loblaw Companies Ltd., 2016?].

Annual Reports (Online) in a Database (e.g., Mergent Online, SEDAR)

Include company name, title and subtitle (in quotation marks), date of publication or date of posting (if available), access date, and a DOI (preferred) or stable URL to the report. If both are unavailable, include the name of the database at the end of the citation. If using a PDF version of a report, include the page number(s) in the endnotes. For additional guidelines, see entry for Annual Reports (Printed.) NOTE: For annual reports retrieved from a company website, follow the generic online format noted in the Web Pages/Websites section of this Guide.

Endnote Form (First Citing):

Loblaw Companies Ltd., “Innovate, Execute, Optimize: 2015 Annual Report – Financial Review,” February 25, 2016, 22-23, accessed May 6, 2017, SEDAR.

Subsequent Endnote Form:

Loblaw, “2015 Annual Report,” 18.

Bibliographic Form:

Loblaw Companies Ltd. “Innovate, Execute, Optimize: 2015 Annual Report – Financial Review.” February 25, 2016. Accessed May 6, 2017. SEDAR.

Articles (Printed)**Article or Chapter in a Printed Book**

Include the article/chapter author(s), the article/chapter title (in quotation marks), precede the title of the book with in, title and subtitle of book (in italics), editor(s), place of publication, publisher, year of publication and page number(s). NOTE: In the bibliography entry, the editor notation becomes edited by and the page range for the entire article/chapter is included.

Endnote Form (First Citing):

Daniel Wells, “Climate Change and Business Valuation Techniques,” in *Cut Carbon, Grow Profits: Business Strategies for Managing Climate Change and Sustainability*, eds. Kenny Tang and Ruth Yeoh (London: Middlesex University Press, 2007), 262.

Subsequent Endnote Form:

Wells, “Climate Change and Business Valuation Techniques,” 260.

Bibliographic Form:

Wells, Daniel. “Climate Change and Business Valuation Techniques.” In *Cut Carbon, Grow Profits: Business Strategies for Managing Climate Change and Sustainability*, edited by Kenny Tang and Ruth Yeoh, 259-273. London: Middlesex University Press, 2007.

Article in a Printed Journal

Include author(s), article title (in quotation marks), journal title (in italics), volume and/or issue, date of publication, and page number(s) of article. NOTE: If an article has four to ten authors, list all the authors in the bibliography. If there are more than ten authors, list the first seven authors in the bibliography followed by et al. ("and others"). In the endnotes list only the first-listed author, followed by et al.

Endnote Form (First Citing):

John Small, "Boomers in the Marketplace: Grey and Loving It," *Canadian Journal of Marketing* 20, no. 1 (Winter 2000): 36.

Subsequent Endnote Form:

Small, "Boomers," 39.

Bibliographic Form:

Small, John. "Boomers in the Marketplace: Grey and Loving It." *Canadian Journal of Marketing* 20, no. 1 (Winter 2000): 35-42.

Article in a Printed Magazine

Include author(s), article title (in quotation marks), magazine title (in italics), date of publication, and page number(s) of article. NOTE: Even if a magazine is numbered by volume and issue, include date of publication only.

Endnote Form (First Citing):

Brenda Dalglish, "Jolts of Asian Energy: Immigrants Bring Money, Jobs and Spirit," *Maclean's*, August 24, 1992, 41.

Subsequent Endnote Form:

Dalglish, "Jolts of Asian Energy," 48.

Bibliographic Form:

Dalglish, Brenda. "Jolts of Asian Energy: Immigrants Bring Money, Jobs and Spirit." *Maclean's*, August 24, 1992, 41-52.

Article in a Printed Newspaper

Include author(s)(if listed), article title/headline (in quotation marks), newspaper title (in italics), date of publication, section of article, and page number.

Endnote Form (First Citing):

Jane Armstrong, "Seniority Barrier for Women to Be Tested," *Toronto Star*, August 21, 1992, sec. A, p.7.

Subsequent Endnote Form:

Armstrong, "Seniority Barrier," sec. A, p.7.

Bibliographic Form:

Armstrong, Jane. "Seniority Barrier for Women to Be Tested." *Toronto Star*, August 21, 1992, sec. A, p.7.

Articles (Online)**Article from an Online Journal**

Include author(s), article title (in quotation marks), journal title (in italics), volume and/or issue, date of publication, page number(s) of article, access date, and DOI (preferred) or stable URL to the article. If both are unavailable, include the name of the database or site. NOTE: If an article has four to ten authors, cite all the authors in the bibliography. If an article has more than ten authors, cite the first seven authors in the bibliography followed by et al. ("and others"). In the endnotes cite only the first-listed author, followed by et al.

Endnote Form (First Citing):

Marcus Selart and Svein Tvedt Johansen, "Ethical Decision Making in Organizations: The Role of Leadership Stress," *Journal of Business Ethics* 99, no. 2 (March 2011): 136, accessed August 16, 2016, doi: 10.1007/s10551-010-0649-0.

Subsequent Endnote Form:

Selart and Johansen, "Ethical Decision Making in Organizations," 132.

Bibliographic Form:

Selart, Marcus, and Svein Tvedt Johansen. "Ethical Decision Making in Organizations: The Role of Leadership Stress." *Journal of Business Ethics* 99, no. 2 (March 2011): 129-143. Accessed August 16, 2016. doi: 10.1007/s10551-010-0649-0.

Article from an Online Journal in a Database (e.g., ABI/INFORM Complete, etc.)

Include author(s), article title (in quotation marks), journal title (in italics), volume and/or issue, date of publication, page number(s) of article, access date, and a DOI (preferred) or stable URL to the article. If both are unavailable, include the name of the database. NOTE: If an article has four to ten authors, cite all the authors in the bibliography. If an article has more than ten authors, cite the first seven authors in the bibliography followed by et al. ("and others"). In the endnotes cite only the first-listed author, followed by et al.

Endnote Form (First Citing):

Constantine Campaniaris et al., "The Development of an Apparel Industry Model for Canada," *Journal of Fashion Marketing and Management* 19, no. 3 (2015): 333, accessed May 24, 2017, <http://libaccess.mcmaster.ca/login?url=http://search.proquest.com/docview/1701902069?accountid=12347>.

Subsequent Endnote Form:

Campaniaris et al., "Apparel Industry Model for Canada," 337.

Bibliographic Form:

Campaniaris, Constantine, Richard Murray, Steven Hayes, and Michael Jeffrey. "The Development of an Apparel Industry Model for Canada." *Journal of Fashion Marketing and Management* 19, no. 3 (2015): 328-342. Accessed May 24, 2017. <http://libaccess.mcmaster.ca/login?url=http://search.proquest.com/docview/1701902069?accountid=12347>.

Article from an Online Magazine

Include author(s), article title (in quotation marks), magazine title (in italics), date of publication, page number(s) of article (if provided), access date, and DOI (preferred) or stable URL to the article. If both are unavailable, include the name of the database or site. NOTE: Even if a magazine is numbered by volume and issue, include date of publication only.

Endnote Form (First Citing):

John Shmuel, "What to 'Like' in Social Media," *Financial Post Magazine*, September 12, 2013, accessed November 2, 2016, <http://business.financialpost.com/financial-post-magazine/what-to-like-in-the-social-media-sector>.

Subsequent Endnote Form:

Shmuel, "What to 'Like' in Social Media," World Wide Web.

Bibliographic Form:

Shmuel, John. "What to 'Like' in Social Media." *Financial Post Magazine*, September 12, 2013. Accessed November 2, 2016. <http://business.financialpost.com/financial-post-magazine/what-to-like-in-the-social-media-sector>.

Article from an Online Magazine in a Database (e.g., Business Source Complete, etc.)

Include author(s), article title (in quotation marks), magazine title (in italics), date of publication, page number(s) of article, access date, and a DOI (preferred) or stable URL to the article. If both are unavailable, include the name of the database. NOTE: Even if a magazine is numbered by volume and issue, include date of publication only.

Endnote Form (First Citing):

Dave Ulrich and Norm Smallwood, "Building a Leadership Brand," *Harvard Business Review*, July/August 2007, 96, accessed December 20, 2016, <http://libaccess.mcmaster.ca/login?url=http://search.ebscohost.com/login.aspx?direct=true&db=bth&AN=25354749&site=bsi-live>.

Subsequent Endnote Form:

Ulrich and Smallwood, "Building a Leadership Brand," 92-93.

Bibliographic Form:

Ulrich, David, and Norm Smallwood. "Building a Leadership Brand." *Harvard Business Review*, July/August 2007, 92-100. Accessed December 20, 2016. <http://libaccess.mcmaster.ca/login?url=http://search.ebscohost.com/login.aspx?direct=true&db=bth&AN=25354749&site=bsi-live>.

Article from an Online Newspaper or News Service

Include author(s), article title/headline (in quotation marks), newspaper title or news service, date of publication, access date, and a DOI (preferred) or stable URL to the article. If both are unavailable, include the name of the site. NOTE: Names of newspapers should be italicized (e.g., New York Times) whereas the names of news services should be capitalized, but not italicized (e.g., Associated Press).

Endnote Form (First Citing):

Sophia Harris, "Small Businesses Root for Walmart in Fee Battle with Visa," CBC News, June 16, 2016, accessed June 20, 2017, <http://www.cbc.ca/news/business/walmart-visa-credit-card-payment-fees-1.3639473>.

Subsequent Endnote Form:

Harris, "Small Businesses Root for Walmart," World Wide Web.

Bibliographic Form:

Harris, Sophia. "Small Businesses Root for Walmart in Fee Battle with Visa." CBC News, June 16, 2016. Accessed June 20, 2017. <http://www.cbc.ca/news/business/walmart-visa-credit-card-payment-fees-1.3639473>.

Article from an Online Newspaper or News Service in a Database (e.g., Factiva, LexisNexis, etc.)

Include author(s), article title/headline (in quotation marks), newspaper title or news service, date of publication, access date, and a DOI (preferred) or stable URL to the article. If both are unavailable, include the name of the database. NOTE: Names of newspapers should be italicized (e.g., Globe & Mail) whereas the names of news services should be capitalized, but not italicized (e.g., CNN).

Endnote Form (First Citing):

Esther Fung, "Mall Owners Pour Cash Into Technology," *Wall Street Journal*, June 8, 2016, accessed August 15, 2017, Factiva.

Subsequent Endnote Form:

Fung, "Mall Owners Pour Cash Into Technology," World Wide Web.

Bibliographic Form:

Fung, Esther. "Mall Owners Pour Cash Into Technology." *Wall Street Journal*, June 8, 2016. Accessed August 15, 2017. Factiva.

Blog Post (or Entry)

Include author(s), title of post (in quotation marks), name of blog (in italics) followed by the word blog in parentheses, name of larger publication (if applicable), date of post, access date, and URL. NOTE: If the word blog is part of the blog's name (e.g., Seth's Blog), it is not necessary to include (blog) in the citation. If citing an entire blog site (not a specific post), include author, name of blog (in italics), access date, and URL only.

Endnote Form (First Citing):

Sharlyn Lauby, "High Potential and High Performing Are Two Different Things," *HR Bartender* (blog), November 4, 2014, accessed November 11, 2016, <http://www.hrbartender.com/2014/training/high-potential-high-performing-two-different-things/>.

Subsequent Endnote Form:

Lauby, "High Potential and High Performing," blog post.

Bibliographic Form:

Lauby, Sharlyn. "High Potential and High Performing Are Two Different Things." *HR Bartender* (blog). November 4, 2014. Accessed November 11, 2016. <http://www.hrbartender.com/2014/training/high-potential-high-performing-two-different-things/>.

Blog Comment

Citations of a blog comment should start with the identity of the commenter, date of the comment (if a time stamp appears with the comment), the words comment on, and the citation information for the related blog post. NOTE: This format can be adapted for citing comments that appear on other types of websites.

Endnote Form (First Citing):

Rebecca, November 6, 2014 (3:02 p.m.), comment on Sharlyn Lauby, "High Potential and High Performing Are Two Different Things," *HR Bartender* (blog), November 4, 2014, accessed January 15, 2017, <http://www.hrbartender.com/2014/training/high-potential-high-performing-two-different-things/>.

Subsequent Endnote Form:

Rebecca, comment on Lauby, "High Potential and High Performing," blog post.

Bibliographic Form:

Rebecca. November 6, 2014 (3:02 p.m.) Comment on Lauby, Sharlyn. "High Potential and High Performing Are Two Different Things." *HR Bartender* (blog). November 4, 2015. Accessed January 15, 2017. <http://www.hrbartender.com/2014/training/high-potential-high-performing-two-different-things/>.

Books (Printed)

Books, Printed - One Author

Include author, title and subtitle of book (in italics), place of publication, publisher, year of publication, and page number(s) for endnotes.

Endnote Form (First Citing):

Ken Auletta, *Googled: The End of the World As We Know It* (New York: Penguin Press, 2009), 10-15.

Subsequent Endnote Form:

Auletta, *Googled*, 43.

Bibliographic Form:

Auletta, Ken. *Googled: The End of the World As We Know It*. New York: Penguin Press, 2009.

Books, Printed - Two or Three Authors

Include authors (put names in the order that they appear), title and subtitle of book (in italics), place of publication, publisher, year of publication, and page number(s) for endnotes. NOTE: Only the first-listed name is inverted in the bibliography.

Endnote Form (First Citing):

Terry O'Reilly and Mike Tennant, *The Age of Persuasion: How Marketing Ate Our Culture* (Berkeley: Counterpoint, 2010), 21.

Subsequent Endnote Form:

O'Reilly and Tennant, *Age of Persuasion*, 33-34.

Bibliographic Form:

O'Reilly, Terry, and Mike Tennant. *The Age of Persuasion: How Marketing Ate Our Culture*. Berkeley: Counterpoint, 2010.

Books, Printed - Four or More Authors

Include author(s) (put names in the order that they appear), title and subtitle of book (in italics), place of publication, publisher, year of publication, and page number(s) for endnotes. NOTE: If a book has four to ten authors, cite all the authors in the bibliography. If a book has more than ten authors, cite the first seven authors in the bibliography followed by et al. ("and others"). In the endnotes cite only the first-listed author, followed by et al.

Endnote Form (First Citing):

William G. Nickels et al., *Understanding Canadian Business*, 9th ed. (Toronto: McGraw-Hill Ryerson Ltd., 2016), 192.

Subsequent Endnote Form:

Nickels et al., *Understanding Canadian Business*, 203.

Bibliographic Form:

Nickels, William G., James M. McHugh, Susan M. McHugh, Rita Cossa, Julie Stevens, and Bob Sproule. *Understanding Canadian Business*. 9th ed. Toronto: McGraw-Hill Ryerson Ltd., 2016.

Books, Printed - Editor or Compiler as Author

Include editor(s) followed by the abbreviation ed. (if multiple editors, put names in the order that they appear and use the abbreviation eds.), title and subtitle of book (in italics), place of publication, publisher, year of publication, and page number(s) for endnotes.

Endnote Form (First Citing):

Jennifer Scanlon, ed., *The Gender and Consumer Culture Reader* (New York: New York University Press, 2000), 34.

Subsequent Endnote Form:

Scanlon, *The Gender and Consumer Culture Reader*, 37.

Bibliographic Form:

Scanlon, Jennifer, ed. *The Gender and Consumer Culture Reader*. New York: New York University Press, 2000.

Books, Printed - Edition Other Than First

Include author(s) or editor(s) (if multiple authors/editors, put names in the order that they appear), title and subtitle of book (in italics), edition, place of publication, publisher, year of publication, and page number(s) for endnotes.

Endnote Form (First Citing):

Gary Johns and Alan M. Saks, *Organizational Behaviour: Understanding and Managing Life at Work*, 8th ed. (Toronto: Pearson Canada, 2011), 35.

Subsequent Endnote Form:

Johns and Saks, *Organizational Behaviour*, 37.

Bibliographic Form:

Johns, Gary, and Alan M. Saks. *Organizational Behaviour: Understanding and Managing Life at Work*. 8th ed. Toronto: Pearson Canada, 2011.

Books, Printed - Four or More Authors, Edition Other Than First

Include authors (put names in the order that they appear), title and subtitle of book (in italics), edition, place of publication, publisher, year of publication, and page number(s) for endnotes. NOTE: If a book has four to ten authors, cite all the authors in the bibliography. If a book has more than ten authors, cite the first seven authors in the bibliography followed by et al. ("and others"). In the endnotes cite only the first-listed author, followed by et al.

Endnote Form (First Citing):

Philip Kotler et al., *Marketing Management*, 13th Canadian ed. (Toronto: Pearson Canada, 2009), 68.

Subsequent Endnote Form:

Kotler et al., *Marketing Management*, 37.

Bibliographic Form:

Kotler, Philip, Kevin Lane Keller, Peggy H. Cunningham, and Subramanian Sivaramakrishnan. *Marketing Management*. 13th Canadian ed. Toronto: Pearson Canada, 2009.

Books, Printed - No Author

If no author or editor is listed, start with the title and subtitle of the work (in italics), followed by place of publication, publisher, year of publication, and page number(s) for endnotes:

Endnote Form (First Citing):

Scott's Directories: Ontario Manufacturers Directory 2013 (Toronto: Scott's Directories, 2012), 2-555.

Subsequent Endnote Form:

Scott's Directories: Ontario Manufacturers Directory 2013, 2-319.

Bibliographic Form:

Scott's Directories: Ontario Manufacturers Directory 2013. Toronto: Scott's Directories, 2012.

Books (Online)

Books consulted online are cited like their print counterparts with the addition of an access date and a DOI or URL at the end of the citation. For additional guidelines, refer to the Books (Printed) section of this Guide.

Include author(s) or editor(s) (if multiple authors/editors, put names in the order that they appear), title and subtitle of book (in italics), place of publication, publisher, year of publication, page number(s) for endnotes, access date and DOI (preferred) or stable URL. NOTE: In this example, the URL used in the citation was copied from the relevant record in McMaster's library catalogue.

Endnote Form (First Citing):

Daniel S. Hamermesh, *Beauty Pays: Why Attractive People Are More Successful* (Princeton: Princeton University Press, 2011): 23, accessed June 10, 2017, <http://libaccess.mcmaster.ca/login?url=http://site.ebrary.com/lib/oculmcmaster/docDetail.action?docID=10482004>.

Subsequent Endnote Form:

Hamermesh, *Beauty Pays*, 89.

Bibliographic Form:

Hamermesh, Daniel S. *Beauty Pays: Why Attractive People Are More Successful*. Princeton: Princeton University Press, 2011. Accessed June 10, 2017. <http://libaccess.mcmaster.ca/login?url=http://site.ebrary.com/lib/oculmcmaster/docDetail.action?docID=10482004>.

Brochures, Handouts, Pamphlets, etc.

Follow general rules for books when possible. If the information can be assumed, include it, but with a question mark and between square brackets. If the entry is very sparse, include a descriptive statement within a square bracket.

Endnote Form (First Citing):

Kellogg Canada Inc., [Untitled Promotional Brochure] (Etobicoke: Kellogg Canada Inc., [2017?]).

Subsequent Endnote Form:

Kellogg Canada Inc., [Untitled Promotional Brochure].

Bibliographic Form:

Kellogg Canada Inc. [Untitled Promotional Brochure]. Etobicoke: Kellogg Canada Inc., [2017?].

CD-ROM (Compact Disc Read-Only Memory)

Follow general rules for books when possible. Include CD-ROM at the end of the citation.

Endnote Form (First Citing):

Statistics Canada, *Financial Performance Indicators for Canadian Business 2009* (Ottawa: Statistics Canada, 2011), CD-ROM.

Subsequent Endnote Form:

Statistics Canada, *Financial Performance Indicators for Canadian Business 2009*, CD-ROM.

Bibliographic Form:

Statistics Canada. *Financial Performance Indicators for Canadian Business 2009*. Ottawa: Statistics Canada, 2011. CD-ROM.

Courseware

Follow general rules for books when possible.

Custom Courseware Package

Endnote Form (First Citing)

William G. Nickels et al., *Custom Courseware: Understanding Canadian Business*, 7th Canadian ed. (Toronto: McGraw-Hill Ryerson, 2011), 19.

Subsequent Endnote Form:

Nickels et al., *Custom Courseware: Understanding Canadian Business*, 58.

Bibliographic Form:

Nickels, William G., James M. McHugh, Susan M. McHugh, Rita Cossa, and Bob Sproule. *Custom Courseware: Understanding Canadian Business*. 7th Canadian ed. Toronto: McGraw-Hill Ryerson, 2011.

Custom Courseware - Single Reading within Courseware Package

Endnote Form (First Citing):

Linda Himelstein, "Yahoo-The Company, the Strategy, the Stock," *Business Week*, September 7, 1998, in *Custom Courseware: Commerce 4QE3*, ed. Yufei Yuan (Hamilton: McMaster University Bookstore, January 1999), 57.

Subsequent Endnote Form:

Himelstein, "Yahoo," 58.

Bibliographic Form:

Himelstein, Linda. "Yahoo-The Company, the Strategy, the Stock." *BusinessWeek*, September 7, 1998. In *Custom Courseware: Commerce 4QE3*, edited by Yufei Yuan, 55-64. Hamilton: McMaster University Bookstore, January 1999.

DVDs/Videocassettes

Publication details for these materials generally follow that of books, with the addition of DVD or VHS at the end of the citation. Scenes or episodes are treated as chapters and are cited by title or by number. Supplementary material, such as commentary, is cited by author and title. To cite a video available online, use the format noted under the Online Videos section of this Guide.

Endnote Form (First Citing):

"The Doll," *Curb Your Enthusiasm: The Complete Second Season*, directed by Robert B. Weide (New York: HBO Video, 2004), DVD.

Subsequent Endnote Form:

"The Doll," DVD.

Bibliographic Form:

"The Doll." *Curb Your Enthusiasm: The Complete Second Season*. Directed by Robert B. Weide. New York: HBO Video, 2004. DVD.

Indirect Sources ("Quoted In")

When the work of an author is quoted by another author, it is considered an indirect source. It is always best to consult the original source whenever possible, however, if the original is unavailable, both the original and indirect source must be cited in full. In the example below, the Jenkins book is the original source.

Endnote Form (First Citing):

Laurie Jenkins, *Conflict and Crisis* (New York: Hill and Wong, 1996), 132, quoted in Ann Li, *Studies in Art* (Chicago: University of Chicago Press, 1998), 13.

Subsequent Endnote Form:

Jenkins, *Conflict and Crisis*, 132.

Bibliographic Form:

Jenkins, Laurie. *Conflict and Crisis*. New York: Hill and Wong, 1996, 132. Quoted in Ann Li, *Studies in Art*, 13. Chicago: University of Chicago Press, 1998.

Lecture Notes

Lecture notes are considered secondary research. Include the author, course code and title of the topic, location and the date when the lecture was taught, the access date, and the URL where the lecture notes were posted. NOTE: If notes are not posted online, exclude the access date and the URL.

Endnote Form (First Citing):

Rita Cossa, "Commerce 1E03: Forms of Business Ownership" (lecture, McMaster University, Hamilton, February 9, 2017), accessed March 8, 2017, <http://avenue.mcmaster.ca>.

Subsequent Endnote Form:

Cossa, "Forms of Business Ownership," lecture.

Bibliographic Form:

Cossa, Rita. "Commerce 1E03: Forms of Business Ownership." Lecture. McMaster University, Hamilton, February 9, 2017. Accessed March 8, 2017. <http://avenue.mcmaster.ca>.

Letters (Unpublished)

Include author(s) of letter, position and/or company affiliation and date of letter. NOTE: If a letter is posted online, it is considered "published". As such, use the generic online format outlined in the Web Pages/Websites section of this Guide for online letters.

Endnote Form (First Citing):

Walter White, Chief Executive Officer, Crystal Blue Persuasion, Ltd., letter, March 15, 2017.

Subsequent Endnote Form:

White, letter, March 15, 2017.

Bibliographic Form:

White, Walter. Chief Executive Officer, Crystal Blue Persuasion, Ltd. Letter. March 15, 2017.

Online Videos (e.g., YouTube, etc.)

Include author(s), title, format/medium, running time, source and date of posting, access date, and URL. NOTE: If the material has been "previously published", include information about the original source after the running time (e.g., from a performance televised by CTV on December 31, 1977). NOTE: If citing an online video site/page (rather than a single or specific video)(e.g., a YouTube channel), follow the generic online format noted in the Web Pages/Websites section of this Guide.

Endnote Form (First Citing):

Sheryl Sandberg, "Why We Have Too Few Women Leaders," YouTube video, 15:28, posted by TED Talks, December 21, 2010, accessed December 30, 2016, <https://www.youtube.com/watch?v=18uDutyIDa4>.

Subsequent Endnote Form:

Sandberg, "Why We Have Too Few Women Leaders," YouTube video.

Bibliographic Form:

Sandberg, Sheryl. "Why We Have Too Few Women Leaders." YouTube video, 15:28. Posted by TED Talks, December 21, 2010. Accessed December 30, 2016. <https://www.youtube.com/watch?v=18uDutyIDa4>.

Podcasts

Include author or speaker's name(s), title of the podcast (in quotation marks), format/medium, title of the podcast series (in italics) and/or sponsor of the site, broadcast date, access date, and URL.

Endnote Form (First Citing):

Robert Smith, "Episode 366: How to Make It in the Food Truck Business," podcast audio, *Planet Money*, NPR, April 27, 2012, accessed June 30, 2016, <http://www.npr.org/sections/money/2016/05/18/478563359/episode-366-how-to-make-it-in-the-food-truck-business>.

Subsequent Endnote Form:

Smith, "Food Truck Business," podcast audio.

Bibliographic Form:

Smith, Robert. "Episode 366: How to Make It in the Food Truck Business." Podcast audio. *Planet Money*, NPR, April 27, 2012. Accessed June 30, 2016. <http://www.npr.org/sections/money/2016/05/18/478563359/episode-366-how-to-make-it-in-the-food-truck-business>.

Reports in a Database (Online)

Include author(s) of report (corporate or individual), title of report (in quotation marks), date of publication or date of posting, access date, and a DOI (preferred) or stable URL to the report. If both are unavailable, include the name of the database at the end of the citation. If using a PDF version of a report, include the page number(s) in the endnotes.

Endnote Form (First Citing):

Robert Meyer-Robinson, "Canada's Food Services Industry: Industrial Outlook Winter 2016," April 11, 2017, 4-5, accessed September 30, 2017, Conference Board of Canada e-Library.

Subsequent Endnote Form:

Meyer-Robinson, "Canada's Food Services Industry," 3.

Bibliographic Form:

Meyer-Robinson, Robert. "Canada's Food Services Industry: Industrial Outlook Winter 2016." April 11, 2017. Accessed September 30, 2017. Conference Board of Canada e-Library.

Slides or Papers Presented at Meetings or Conferences

Include presenter(s), title of presentation (in quotation marks), location, and date of presentation. NOTE: If using slides or papers posted online, follow the generic online format outlined in the Web Pages/Websites section of this Guide.

Endnote Form (First Citing):

David Wilkinson, "2017 State of the Academy" (presentation, McMaster University, Hamilton, April 7, 2017).

Subsequent Endnote Form:

Wilkinson, "2017 State of the Academy," presentation.

Bibliographic Form:

Wilkinson, David. "2017 State of the Academy." Presentation. McMaster University, Hamilton, April 7, 2017.

Social Networking Posts (e.g., Facebook, Twitter, etc.)

Include author(s), format/medium, date/time of posting, access date, and URL. NOTE: To get a stable URL for a specific post, click or copy the date/time stamp link associated with the post. NOTE: If citing an entire social networking site (not a specific post), follow the generic online format noted in the Web Pages/Websites section of this Guide.

Twitter Post**Endnote Form (First Citing):**

Arlene Dickinson, Twitter post, May 2, 2014, 2:28 p.m., accessed August 25, 2016, <https://twitter.com/ArleneDickinson/status/462297488146173952>.

Subsequent Endnote Form:

Dickinson, Twitter post, May 2, 2014.

Bibliographic Form:

Dickinson, Arlene. Twitter post. May 2, 2014, 2:28 p.m. Accessed August 25, 2016. <https://twitter.com/ArleneDickinson/status/462297488146173952>.

Web Pages/Websites (Generic Online Format for Company, Government & Personal Web Pages, Documents, etc.)

Include author(s)(corporate or individual), title of the page (in quotation marks), title or owner of the site (i.e., the company or person who publishes, hosts or is responsible for the site), date of publication or date of posting (if available), access date, and URL.

HTML (Hypertext Markup Language)

NOTES: For the title of a web page, use the wording on the page rather than the title tag (title given in blue bar at very top of screen). If a web page does not include a date of publication or posting, omit it from the citation. Use "World Wide Web" for subsequent endnotes.

Endnote Form (First Citing):

Sears Canada Inc., "Corporate Governance," Sears Canada Inc., April 2016, accessed February 6, 2017, <https://www.sears.ca/en/corporate-governance.html>.

HTML Subsequent Endnote Form:

Sears Canada, "Corporate Governance," World Wide Web.

HTML Bibliographic Form:

Sears Canada Inc. "Corporate Governance." Sears Canada Inc. April 2016. Accessed February 6, 2017. <https://www.sears.ca/en/corporate-governance.html>.

PDF (Portable Document Format)

NOTES: If a PDF does not include a date of publication or posting, omit it from the citation. If using PDF documents with page numbers, include them in the endnotes.

Endnote Form (First Citing):

Tim Hortons, "Ingredient Information," Tim Hortons, June 2016, 2-3, accessed July 1, 2017, http://www.timhortons.com/ca/en/pdf/Ingredient_Information_-_Canada.pdf.

Subsequent Endnote Form:

Tim Hortons, "Ingredient Information," 16.

Bibliographic Form:

Tim Hortons. "Ingredient Information." Tim Hortons. June 2016. Accessed July 1, 2017. http://www.timhortons.com/ca/en/pdf/Ingredient_Information_-_Canada.pdf.

Part Three: Frequently Cited Secondary Sources**Associations Canada (Books, Printed – No Author; Edition Other Than First)****Endnote Form:**

Associations Canada 2017, 38th ed. (Toronto: Grey House Publishing, 2017), 267.

Subsequent Endnote Form:

Associations Canada 2017, 175.

Bibliographic Form:

Associations Canada 2017. 38th ed. Toronto: Grey House Publishing, 2017.

Business Source Complete (Reports in a Database)

NOTE: This database provides stable URLs (i.e., permalinks) for reports, so the database name is not included in the citation.

Endnote Form (First Citing):

MarketLine, "MarketLine Industry Profile: Airlines in Canada," July 2016, 12-14, accessed January 13, 2017, <http://libaccess.mcmaster.ca/login?url=http://search.ebscohost.com/login.aspx?direct=true&db=bth&AN=121459284&site=bsi-live>.

Subsequent Endnote Form:

MarketLine, "Airlines in Canada," 15.

Bibliographic Form:

MarketLine. "MarketLine Industry Profile: Airlines in Canada." July 2016. Accessed January 13, 2017. <http://libaccess.mcmaster.ca/login?url=http://search.ebscohost.com/login.aspx?direct=true&db=bth&AN=121459284&site=bsi-live>.

Canadian Business Database (Books, Online)

NOTE: This source does not have a DOI. The most stable url for this source is the home page (or root URL) which is noted in McMaster's library catalogue and in the Databases tab on the Library home page.

Endnote Form (First Citing):

Canadian Business Database (Papillion: ReferenceUSA, 2017), accessed August 16, 2017, <http://libaccess.mcmaster.ca/login?url=http://www.referenceusa.com>.

Subsequent Endnote Form:

Canadian Business Database, World Wide Web.

Bibliographic Form:

Canadian Business Database. Papillion: ReferenceUSA, 2017. Accessed August 16, 2017. <http://libaccess.mcmaster.ca/login?url=http://www.referenceusa.com>.

Canadian Business Patterns via ODESI (Table/Data in a Database)

NOTE: This database does not provide DOIs or stable URLs, so the name of the database is included in the citation.

Endnote Form (First Citing):

Statistics Canada, "Canadian Business Patterns, 2010-2016," accessed April 1, 2017, ODESI.

Subsequent Endnote Form:

Statistics Canada, "Canadian Business Patterns," World Wide Web.

Bibliographic Form:

Statistics Canada. "Canadian Business Patterns, 2010-2016." Accessed April 1, 2017. ODESI.

CANSIM (Table/Data in a Database)

NOTE: This database does not provide DOIs or stable URLs, so the name of this database is included in the citation.

Endnote Form (First Citing):

Statistics Canada, "Table 355-0008: Food Services and Drinking Places, Summary Statistics, Annual (Dollars)," accessed September 10, 2016, CANSIM.

Subsequent Endnote Form:

Statistics Canada, "Table 355-0008," World Wide Web.

Bibliographic Form:

Statistics Canada. "Table 355-0008: Food Services and Drinking Places, Summary Statistics, Annual (Dollars)." Accessed September 10, 2016. CANSIM.

CPA Canada Standards and Guidance Collection (Chapter in an Online Book)

NOTE: This source does not have a DOI. The most stable url for this source is the home page (or root URL) which is noted in McMaster's Library Catalogue and in the Databases tab on the home page.

Endnote Form (First Citing):

Chartered Professional Accountants Canada, "Section 1101 – Generally Accepted Accounting Principles for Not-For-Profit Organizations," in *CPA Canada Standards and Guidance Collection* (Toronto: Knotia Canada, 2017), accessed March 19, 2017, <http://libaccess.mcmaster.ca/login?url=http://edu.knotia.ca/knowledge/Home.aspx>.

Subsequent Endnote Form:

CPA, "Section 1101," World Wide Web.

Bibliographic Form:

Chartered Professional Accountants Canada. "Section 1101 – Generally Accepted Accounting Principles for Not-For-Profit Organizations." In *CPA Canada Standards and Guidance Collection*. Toronto: Knotia Canada, 2017. Accessed March 19, 2017. <http://libaccess.mcmaster.ca/login?url=http://edu.knotia.ca/knowledge/Home.aspx>.

DBRS (Dominion Bond Rating Service) (Reports in a Database)

NOTE: This database does not provide DOIs or stable URLs for reports, so the database name is included in the citation.

Endnote Form (First Citing):

Ben Deutsch et al., "Industry Study: Food Fight! The Food Retailing Industry in Canada," March 2014, 6-10, accessed May 4, 2017, DBRS.

Subsequent Endnote Form:

Deutsch et al., "Food Fight!" 12.

Bibliographic Form:

Deutsch, Ben, Joanne Chen, Michael Goldberg, and Anil Passi. "Industry Study: Food Fight! The Food Retailing Industry in Canada." March 2014. Accessed May 4, 2017. DBRS.

EIU (Economist Intelligence Unit) (Reports in a Database)

NOTE: This database does not provide DOIs or stable URLs for reports, so the database name is included in the citation. If using the PDF version of a report, include the page number(s) in the endnotes.

Endnote Form (First Citing):

Economist Intelligence Unit, "Country Report: United Kingdom," April 2017, accessed June 28, 2017, Economist Intelligence Unit.

Subsequent Endnote Form:

EIU, "Country Report: United Kingdom," World Wide Web.

Bibliographic Form:

Economist Intelligence Unit. "Country Report: United Kingdom." April 2017. Accessed June 28, 2017. Economist Intelligence Unit.

FP Markets: Canadian Demographics (Books, Printed – No Author)

Endnote Form (First Citing):

FP Markets: Canadian Demographics 2012, 85th ed. (Don Mills: Financial Post, 2011), 297-303.

Subsequent Endnote:

FP Markets: Canadian Demographics 2012, 301.

Bibliographic Form:

FP Markets: Canadian Demographics 2012. 85th ed. Don Mills: Financial Post, 2011.

Hoover's (Reports in a Database)

NOTE: Hoover's reports are available through two Library databases - LexisNexis Academic and ProQuest Entrepreneurship. These databases provide stable URLs, so the database name is not included in the citation. The stable URL (i.e., Document URL) provided in this example comes from ProQuest Entrepreneurship.

Endnote Form (First Citing):

Hoover's Inc., "Indigo Books & Music Inc. Profile," *Hoover's Company Records*, December 6, 2016, 10-12, accessed July 15, 2017, <http://libaccess.mcmaster.ca/login?url=http://search.proquest.com/docview/1860787323?accountid=12347>.

Subsequent Endnote Form:

Hoover's, "Indigo Books & Music," 18.

Bibliographic Form:

Hoover's Inc. "Indigo Books & Music Inc. Profile" *Hoover's Company Records*. December 6, 2016. Accessed July 15, 2017. <http://libaccess.mcmaster.ca/login?url=http://search.proquest.com/docview/1860787323?accountid=12347>.

Human Development Report (Books, Online)

Endnote Form (First Citing):

United Nations Development Programme, *Human Development Report 2016: Human Development for Everyone* (New York: UNDP, 2016): 143, accessed August 1, 2017, <http://hdr.undp.org/en/2016-report>.

Subsequent Endnote Form:

UNDP, *Human Development Report 2016*, 155.

Bibliographic Form:

United Nations Development Programme. *Human Development Report 2016: Human Development for Everyone*. New York: UNDP, 2016. Accessed August 1, 2017. <http://hdr.undp.org/en/2016-report>.

IBISWorld (Reports in a Database)

NOTE: This database does not provide DOIs or stable URLs for reports, so the database name is included in the citation. If viewing the HTML version of the report, use "World Wide Web" for subsequent endnotes.

Endnote Form (First Citing):

Nick Petrillo, "IBISWorld Industry Report 31212CA: Breweries in Canada," August 2016, 18-21, accessed July 12, 2017, IBISWorld.

Subsequent Endnote Form:

Petrillo, "Breweries in Canada," 4.

Bibliographic Form:

Petrillo, Nick. "IBISWorld Industry Report 31212CA: Breweries in Canada." August 2016. Accessed July 12, 2017. IBISWorld.

Infomart (Reports in a Database)

NOTE: This database does not provide DOIs or stable URLs for reports, so the database name is included in the citation. Include corporate author, company name, section of database (in italics), access date and name of database. Date of publication or posting is not provided, so is omitted from the citation.

Endnote Form (First Citing):

Financial Post, "Telus Corporation," *Corporate Surveys*, accessed October 24, 2016, Infomart.

Subsequent Endnote Form:

FP, "Telus Corporation," World Wide Web.

Bibliographic Form:

Financial Post. "Telus Corporation." *Corporate Surveys*. Accessed October 24, 2016. Infomart.

Market Share Reporter (Books, Printed – Editor as Author; Edition Other Than First)

NOTE: The volume number is omitted as pagination between volumes is continuous.

Endnote Form (First Citing):

Robert S. Lazich, ed., "Top Hamburger Chains, 2011-2013," *Market Share Reporter: An Annual Compilation of Reported Market Share Data on Companies, Products, and Services*, 26th ed. (Farmington Hills: Gale, 2016), 673. First published in *USA Today*, December 8, 2014, B1.

Subsequent Endnote Form:

Lazich, "Top Hamburger Chains, 2011-2013," *Market Share Reporter*, 673.

Bibliographic Form:

Lazich, Robert S., ed. *Market Share Reporter: An Annual Compilation of Reported Market Share Data on Companies, Products, and Services*. 26th ed. Farmington Hills: Gale, 2016.

MarketResearch.com Academic (Reports in a Database)

NOTE: This database does not provide DOIs or stable URLs for reports, so the database name is included in the citation.

Endnote Form (First Citing):

Packaged Facts, "Gluten-Free Foods in Canada," August 2013, 68-70, accessed November 7, 2016, MarketResearch.com Academic.

Subsequent Endnote Form:

Packaged Facts, "Gluten-Free Foods in Canada," 38.

Bibliographic Form:

Packaged Facts. "Gluten-Free Foods in Canada." August 2013. Accessed November 7, 2016. MarketResearch.com Academic.

Mergent Industry Reports within Factiva (Reports in a Database)

NOTE: Factiva does not provide DOIs or stable URLs for these reports, so the database name is included in the citation.

Endnote Form:

Mergent, "Biotechnology - North America," *Mergent Industry Reports*, February 1, 2017, accessed June 15, 2017, Factiva.

Subsequent Endnote Form:

Mergent, "Biotechnology - North America," World Wide Web.

Bibliographic Form:

Mergent. "Biotechnology - North America." *Mergent Industry Reports*, February 1, 2017. Accessed June 15, 2017. Factiva.

NAICS Code Manual (Web Pages/Websites)

NOTE: Statistics Canada has published the most current NAICS manual as an online publication only (HTML or PDF). If using the PDF version of the manual, include the page number(s) in the endnotes.

Endnote Form (First Citing):

Statistics Canada, "North American Industry Classification System (NAICS) Canada 2017: 517310 - Wired and Wireless Telecommunications Carriers (Except Satellite)," Statistics Canada, April 19, 2017, accessed November 6, 2017, <http://www23.statcan.gc.ca/imdb/p3VD.pl?Function=getVD&TVD=307532&CVD=307548&CPV=517310&CST=01012017&CLV=5&MLV=5>.

Subsequent Endnote Form:

Statistics Canada, NAICS Canada 2017, World Wide Web.

Bibliographic Form:

Statistics Canada. "North American Industry Classification System (NAICS) Canada 2017: 517310 - Wired and Wireless Telecommunications Carriers (Except Satellite)." Statistics Canada. April 19, 2017. Accessed November 6, 2017. <http://www23.statcan.gc.ca/imdb/p3VD.pl?Function=getVD&TVD=307532&CVD=307548&CPV=517310&CST=01012017&CLV=5&MLV=5>.

Passport (Reports in a Database)

NOTE: This database does not provide DOIs or stable URLs for reports, so the database name is included in the citation. If using the PDF version of a report, include the page number(s) in the endnotes.

Endnote Form (First Citing):

Euromonitor International, "Mixed Retailers in Canada," February 15, 2017, accessed July 23, 2017, Passport.

Subsequent Endnote Form:

Euromonitor, "Mixed Retailers in Canada," World Wide Web.

Bibliographic Form:

Euromonitor International. "Mixed Retailers in Canada." February 15, 2017. Accessed July 23, 2017. Passport.

SIC Code Manual (Books, Printed – No Author)

Endnote Form (First Citing):

Standard Industrial Classification Manual, 3rd ed. (Mississauga: Dun & Bradstreet Canada, 1986), 21.

Subsequent Endnote Form:

Standard Industrial Classification Manual, 22.

Bibliographic Form:

Standard Industrial Classification Manual. 3rd ed. Mississauga: Dun & Bradstreet Canada, 1986.

Thomson ONE (Reports in a Database)

NOTE: This database does not provide DOIs or stable URLs for reports, so the database name is included in the citation.

Endnote Form (First Citing):

Morgan Stanley, "Google: Keep Calm and Search On," April 17, 2014, 5-6, accessed January 4, 2017, Thomson ONE.

Subsequent Endnote Form:

Morgan Stanley, "Google: Keep Calm and Search On," 10.

Bibliographic Form:

Morgan Stanley. "Google: Keep Calm and Search On." April 17, 2014. Accessed January 4, 2017. Thomson ONE.

World Bank DataBank Databases (Table from a Database)

NOTE: This site does not provide DOIs or stable URLs, so the name of the database(s) is included in the citation. The title is based on the variables selected.

Endnote Form (First Citing):

World Bank, "Individuals Using the Internet (% of Population) in Iceland, 2000-2015," accessed July 11, 2017, DataBank: World Development Indicators.

Subsequent Endnote Form:

World Bank, "Individuals Using the Internet in Iceland," World Wide Web.

Bibliographic Form:

World Bank. "Individuals Using the Internet (% of Population) in Iceland, 2000-2015."

Accessed July 11, 2017. DataBank: World Development Indicators.

World Factbook (Web Pages/Websites)

Endnote Form (First Citing):

Central Intelligence Agency, "World Factbook: Australia," CIA, April 21, 2017, accessed June 4, 2017, <https://www.cia.gov/library/publications/the-world-factbook/geos/as.html>.

Subsequent Endnote Form:

CIA, "World Factbook: Australia," World Wide Web.

Bibliographic Form:

Central Intelligence Agency. "World Factbook: Australia." CIA. April 21, 2017. Accessed

June 4, 2017. <https://www.cia.gov/library/publications/the-worldfactbook/geos/as.html>.

Part Four: Citation Examples for Sources of Primary Data

The four main sources of primary data are focus group, interview, observation and survey. Appendixes are required for survey, observation and focus group results.

Focus Group

In the citation, include the name or topic of the focus group, date and location of the focus group, plus the names of participants, in surname alphabetical order. Indicate the direct telephone numbers of the participants.

Endnote Form (First Citing):

Snack Food Preferences, focus group, March 30, 2017, Hamilton. Participants: Ida Smith 905-525-9137, Steve Halback 905-731-5885, Julie Lau 905-521-9438, Nilesh Marshall 905-526-1749, Mina Terrant 905-691-9191, and Larry Wiebe 905-525-9156.

Subsequent Endnote Form:

Snack Food Preferences, focus group, March 30, 2017.

Bibliographic Form:

Snack Food Preferences. Focus group. March 30, 2017. Hamilton. Participants: Ida Smith 905-525-9137, Steve Halback 905-731-5885, Julie Lau 905-521-9438, Nilesh Marshall 905-526-1749, Mina Terrant 905-691-9191, and Larry Wiebe 905-525-9156. See Appendix ___ for full details.

Interviews

If a name is not given or withheld, cite the name as Anonymous and place within square brackets the reasoning (i.e., Anonymous [name withheld upon request]).

E-Mail Interview

Include the full name of the person interviewed, position, company name, date of interview, and e-mail address of the respondent.

Endnote Form (First Citing):

Lester Nygaard, Sales Representative, Bo Munk Insurance Shop, e-mail interview, October 5, 2016, lester.nygaard@hotmail.com.

Subsequent Endnote Form:

Nygaard, e-mail interview, October 5, 2016.

Bibliographic Form:

Nygaard, Lester. Sales Representative, Bo Munk Insurance Shop. E-mail interview. October 5, 2016. lester.nygaard@hotmail.com.

In-Person Interview

Include the full name of the person interviewed, position, company name, date of interview, city of interview, and interviewee's direct phone number (for verification purposes).

Endnote Form (First Citing):

Bobby Owens, President, Basement Bar Records, in-person interview, May 30, 2017, Hamilton, 905-555-9140, ext. 24340.

Subsequent Endnote Form:

Owens, in-person interview, May 30, 2017.

Bibliographic Form:

Owens, Bobby. President, Basement Bar Records. In-person interview. May 30, 2017. Hamilton. 905-555-9140, ext. 24340.

NOTE: If two or more interviews are conducted with the same individual, differentiate the interviews in the subsequent endnote by adding the date to the citation.

Endnote Form (First Citing):

Bobby Owens, President, Basement Bar Records, in-person interview, November 7, 2016, Hamilton, 905-555-9140, ext. 24340.

Subsequent Endnote Form:

Owens, in-person interview, November 27, 2016.

Bibliographic Form:

Owens, Bobby. President, Basement Bar Records. In-person interview. November 7 and 27, 2016. Hamilton. 905-555-9140, ext. 24340.

Phone Interview (or Conference Call)

Include the full name of person(s) interviewed, position, company name, date of interview, and interviewee's direct phone number.

Endnote Form (First Citing):

Rodney Howland, Owner, Back Forty Farm, phone interview, March 9, 2017, 905-555-1643.

Subsequent Endnote Form:

Howland, phone interview, March 9, 2017.

Bibliographic Form:

Howland, Rodney. Owner, Back Forty Farm. Phone interview. March 9, 2017. 905-555-1643.

Observation

Observation research includes the observation of participants or objects (e.g., compare ads). It can involve listening, reading, smelling, and touching.

Your citation should include the name/topic of observation research, the research process used, date(s), location(s) and city (cities) where the research was conducted.

Endnote Form (First Citing):

Laundry Detergent Purchases, observation research, November 21-24, 2016, Sobeys (905 Rymal Rd. E., Hamilton), Franco's No Frills (435 Main St. E., Hamilton), and Fortinos (54 Wilson St. W., Hamilton).

Subsequent Endnote Form:

Laundry Detergent Purchases, observation research, November 21-24, 2016.

Bibliographic Form:

Laundry Detergent Purchases. Observation research. November 21-24, 2016. Sobeys (905 Rymal Rd. E., Hamilton), Franco's No Frills (435 Main St. E., Hamilton), and Fortinos (54 Wilson St. W., Hamilton).

Survey/Questionnaire

Include the name/survey topic, date(s), and place(s) where the survey was conducted. As part of the Ethics approval for courses involving research with humans, each survey must begin with a paragraph that outlines the purpose of the research and the rights of the respondent. Please consult with your instructor for more information regarding guidelines and formatting of surveys.

If conducting an online survey, indicate online survey after the survey topic. (For example, Chocolate Bar Preferences, online survey) Instead of indicating the place(s) where the survey was conducted, indicate the place(s) where the survey was completed. If you conduct your survey in multiple locations, list these locations in alphabetical order. If you conduct your survey in different cities, you should have a separate entry for each location. In this scenario, the entries would be exactly the same, except for the city name in the citation.

Endnote Form (First Citing):

Chewing Gum Preferences, survey, January 13, 2017, Hamilton.

Subsequent Endnote Form:

Chewing Gum Preferences, survey, January 13, 2017.

Bibliographic Form:

Chewing Gum Preferences. Survey. January 13, 2017. Hamilton.

Part Five: Samples

The next pages highlight element examples. You will see the guidelines noted throughout this Guide incorporated in the Appendix, Notes, and Bibliography samples.

Appendix A - Change in Net Income for Canadian National Railway Company (2014-2016)

This appendix will illustrate the steps followed to arrive at the net income changes between 2014 to 2016 for the Canadian National Railway Company. Net income data is included in the table below.

Year	2014	2015	2016
Net Income (C\$ billions)	\$3.17	\$3.54	\$3.64

The formula to calculate a change in net income is as follows:

$$\frac{\text{current year minus the previous year}}{\text{previous year}}$$

a. Calculations from 2015 to 2016

$$\frac{Y2016 - Y2015}{Y2015} = \frac{\$3.64 - \$3.54}{\$3.54} = 2.82\%$$

b. Calculations from 2014 to 2015

$$\frac{Y2015 - Y2014}{Y2014} = \frac{\$3.54 - \$3.17}{\$3.17} = 11.67\%$$

Source: Canadian National Railway Company, "Innovation in Motion: 2016 Annual Report," Canadian National Railway Company, 54, accessed June 6, 2017, <https://www.cn.ca/-/media/Files/Investors/Investor-Annual-Report-Archive/English/2016-CN-Annual-Report.pdf>. This is the source for the company's net income data.

Notes

¹*Standard Industrial Classification Manual*, 3rd ed. (Mississauga: Dun & Bradstreet Canada, 1986), 211.

²Statistics Canada, "North American Industry Classification System (NAICS) Canada 2017: 524111-Direct Individual Life, Health and Medical Insurance Carriers," Statistics Canada, April 19, 2017, accessed July 27, 2017, <http://www23.statcan.gc.ca/imdb/p3VD.pl?Function=getVD&TVD=307532&CVD=307548&CPV=524111&CST=01012017&CLV=5&MLV=5>.

³MarketLine, "MarketLine Industry Profile: Life Insurance in Canada," January 2015, 9-10, accessed September 25, 2017, <http://libaccess.mcmaster.ca/login?url=http://search.ebscohost.com/login.aspx?direct=true&db=bth&AN=100518577&site=bsi-live>.

⁴"Financial Data for Life Insurance Companies," Office of the Superintendent of Financial Institutions, accessed June 10, 2017, <http://www.osfi-bsif.gc.ca/eng/wt-ow/Pages/FINDAT-li.aspx>.

⁵Robert Libby et al., *Financial Accounting*, 3rd Canadian ed. (Toronto: McGraw-Hill Ryerson, 2008), 626; Sun Life Financial Inc., "At a Glance Brochure" (Toronto: Sun Life Financial Inc., 2017). Both sources were required to describe Sun Life's financial activities.

⁶"Sun Life Financial Inc.," Allen H. Gould Trading Floor, accessed September 29, 2017, Bloomberg.

⁷Sun Life Financial Inc., "Consolidated Financial Statements and Notes: Annual Report 2016," Sun Life Financial, 90, accessed June 6, 2017, http://cdn.sunlife.com/static/Global/Investors/Financial%20results%20and%20reports/Annual%20reports/6_Consolidated_Financial_Statements_and_notes_ENG.pdf.

⁸*Ibid.*

⁹Libby et al., *Financial Accounting*, 619.

¹⁰MarketLine, "Company Profile: Sun Life Financial Inc.," March 17, 2016, 4, accessed September 24, 2017, <http://libaccess.mcmaster.ca/login?url=http://search.ebscohost.com/login.aspx?direct=true&db=dmhls&AN=02865323-F972-458E-8728-0422B7F051D8&site=bsi-live>.

¹¹Sun Life Financial Inc., "Building Sustainable Shareholder Value, First Quarter 2017," Sun Life Financial, 6-7, accessed June 6, 2017, http://cdn.sunlife.com/static/Global/Investors/Financial%20results%20and%20reports/Quarterly%20reports/pa_e_Q117_investor_presentation.pdf.

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Revised: June 8, 2017