

# **Citation Guide for Business**

Based on the *Chicago Manual of Style*, 17th ed.

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# Contents

## Part One: Introduction

Citation Style.....	1
Order of Elements in Paper .....	1
Headings and Subheadings.....	1
Page Numbers.....	2
Title Page .....	2
Contents.....	2
Text .....	3
Appendixes.....	4
Tables and Graphs in the Text .....	5
Table 1: Net Income for the Canadian National Railway Company (2014-2016).....	5
Endnotes .....	6
Formatting of Endnotes.....	7
Shortened Endnote Form: Subsequent or Repeating Endnotes.....	8
Annotations: Adding Explanations, Clarifications to Notes .....	8
Citation to Several Sources in One Endnote .....	8
Multiple Pages from the Same Work .....	9
Full-Text Documents in PDF and Web Formats .....	9
Bibliography .....	9
Differences Between Notes and Bibliographies.....	11
General Points for Notes and Bibliographies .....	11
Authors-Anonymous.....	11
Letter Case .....	11
Spacing and Punctuation Within Citations.....	12
Missing Information .....	12
DOIs (Digital Object Identifiers) and URLs (Uniform Resource Locators) .....	12
Dividing or Breaking URLs.....	13
Access Dates .....	13
Sources with No Citation Examples .....	14
Citation Tools .....	14

## Part Two: Citation Examples for Selected Secondary Sources

Advertisements .....	14
Allen H. Gould Trading Floor Data .....	14
Bloomberg.....	14
Thomson Reuters Eikon .....	15
Annual Reports (Printed) .....	15
Annual Reports (Online) in a Database .....	16
Articles (Printed).....	16

Article or Chapter in a Printed Edited Book .....	16
Article in a Printed Journal .....	17
Article in a Printed Magazine .....	17
Article in a Printed Newspaper .....	17
Articles (Online) .....	18
Article from an Online Journal.....	18
Article from an Online Journal in a Database.....	18
Article from an Online Magazine.....	19
Article from an Online Magazine in a Database.....	19
Article from an Online Newspaper or News Service .....	20
Article from an Online Newspaper or News Service in a Database .....	20
Blog Post (or Entry).....	21
Blog Comment .....	21
Books (Printed) .....	22
Books, Printed - One Author.....	22
Books, Printed - Two or Three Authors .....	22
Books, Printed - Four or More Authors .....	22
Books, Printed - Editor or Compiler as Author .....	23
Books, Printed - Edition Other Than First.....	23
Books, Printed – Four or More Authors, Edition Other Than First .....	24
Books, Printed - No Author.....	24
Books (Online).....	24
Brochures, Handouts, Pamphlets, etc. ....	25
CD-ROM (Compact Disc Read-Only Memory) .....	25
Courseware .....	26
Custom Courseware Package .....	26
Custom Courseware, Single Reading within Courseware Package .....	26
Indirect Sources (“Quoted In”) .....	27
Lecture Notes.....	27
Letters (Unpublished) .....	27
Podcasts .....	28
Reports in a Database (Online).....	28
Slides or Papers Presented at Meetings or Conferences .....	29
Social Media Posts (e.g., Facebook, Instagram, Twitter, etc.) .....	29
Videos (DVDs/Videocassettes) .....	29
Videos (Online) .....	30
Web Pages/Websites.....	30
HTML (Hypertext Markup Language) .....	30
PDF (Portable Document Format) .....	31

### **Part Three: Frequently Cited Secondary Sources**

Associations Canada .....	31
Business Source Premier.....	32

Canadian Business Database .....	32
CANSIM .....	33
CPA Canada Standards and Guidance Collection .....	33
DBRS (Dominion Bond Rating Service) .....	33
EIU (Economist Intelligence Unit).....	34
Hoover’s .....	34
Human Development Report.....	34
IBISWorld .....	35
Lynda.com .....	35
Market Share Reporter .....	36
MarketResearch.com Academic .....	36
Mergent Industry Reports via Factiva .....	36
NAICS Code Manual .....	37
Passport .....	37
SIC Code Manual .....	37
Statista .....	38
Thomson ONE .....	38
World Bank DataBank.....	39
World FactBook .....	39

#### **Part Four: Citation Examples for Sources of Primary Data**

Focus Group .....	39
Interviews.....	40
Email Interview .....	40
In-Person Interview.....	40
Phone Interview (or Conference Call) .....	41
Observation .....	41
Survey/Questionnaire.....	42

#### **Part Five: Samples**

Appendix .....	43
Notes .....	44
Bibliography .....	45

## **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*, 17<sup>th</sup> edition. Chicago-style has two basic systems for source citations: (1) notes and bibliography and (2) author-date. This guide illustrates the notes (i.e., endnotes) and bibliography system. We have followed it as closely as possible; however, some entries have been adapted to best suit the needs of the students and instructors at the DeGroote School of Business.

### **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 the title of a book, journal, magazine or newspaper 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.<sup>1</sup> 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.<sup>2</sup>

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. A table should have a number and a short, descriptive title, in bold, flush left on the line above it. The table title 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)**

<b>Year</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>
<b>Net Income (C\$ billions)</b>	\$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.<sup>3</sup>

### 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.<sup>1</sup>

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).”<sup>2</sup>

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.<sup>3</sup>

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.<sup>4</sup>

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,

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

## Shortened Endnote Form: 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.

## 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 <sup>5,6</sup>). 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.<sup>1</sup>

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.
- 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, arrange the entries in alphabetical order by title. For example,

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

Godin, Seth. *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.

"Sun Life Financial Inc." Allen H. Gould Trading Floor. Accessed July 29, 2018, Bloomberg.

Sun Life Financial Inc. "At a Glance Brochure." Toronto: Sun Life Financial Inc., 2018.

Sun Life Financial Inc. "Consolidated Financial Statements and Notes: Annual Report 2017." Sun Life Financial. Accessed July 29, 2018. [http://cdn.sunlife.com/static/Global/Investors/Financial%20results%20and%20reports/Annual%20reports/6\\_SLF\\_ENG\\_Consolidated%20Financial%20Statements%20and%20notes\\_2017.pdf](http://cdn.sunlife.com/static/Global/Investors/Financial%20results%20and%20reports/Annual%20reports/6_SLF_ENG_Consolidated%20Financial%20Statements%20and%20notes_2017.pdf).

Sun Life Financial Inc. "2017 Sustainability Report: Building Sustainable, Healthier Communities for Life." Sun Life Financial. Accessed July 29, 2018. [https://cdn.sunlife.com/static/Global/digital\\_media/MarCom/Sustainability/Sustainability\\_Report\\_E.pdf](https://cdn.sunlife.com/static/Global/digital_media/MarCom/Sustainability/Sustainability_Report_E.pdf).

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 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 alphanumeric string that identifies content and can be used to form a stable URL. For example, the DOI 10.1007/s11002-011-9147-0 belongs to a 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 a source. When a DOI is appended to



the end of this URL - <https://doi.org/>, the resulting link will persistently point to the specific item (e.g., <https://doi.org/10.1007/s11002-011-9147-0>). A **URL with a DOI is preferable** to the URL that appears in your browser's address bar (see Article from an Online Journal for an example).

For content with **no DOI** specified, **use the most direct, complete and stable URL** you can find for your citations. For content openly available on the internet (e.g., government and company web pages), you can generally use the URL that appears in the web browser's address bar. If that URL proves unreliable, use the home page or root URL as the stable link in your citation.

For content contained in a **subscription database** that can only be accessed with a **login** (e.g., MAC ID), it is best to include the **name of the database** at the end of the citation, even when a DOI, permalink or stable URL is provided (e.g., Business Source Premier) (see Part Three of this Guide for examples).

## Dividing or Breaking URLs

URLs follow the flow of the citation and do not automatically start on a separate line.

URLs should be presented in full, beginning with the protocol (e.g., http, https).

When a URL has to be broken at the end of a line, the break should be made as follows:

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

A hyphen should never be added to a URL to denote a line break, nor should a hyphen that is part of a 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 database name, 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, 2017.

#### **Shortened Endnote Form (Subsequent Citing):**

Nestle, "Parents Stealing Smarties," television advertisement.

#### **Bibliography Form:**

Nestle Inc. "Parents Stealing the Smarties From Their Children's Halloween Candy Bags." Television advertisement. Viewed October 31, 2017.

### **Allen H. Gould Trading Floor Data**

#### **Bloomberg**

#### **Endnote Form: (First Citing):**

"Coca-Cola Co.," Allen H. Gould Trading Floor, accessed March 8, 2018, Bloomberg.

**Shortened Endnote Form (Subsequent Citing):**

“Coca-Cola,” Bloomberg.

**Bibliography Form:**

“Coca-Cola Co.” Allen H. Gould Trading Floor. Accessed March 8, 2018, Bloomberg.

**Thomson Reuters Eikon**

**Endnote Form (First Citing):**

“China’s Inflation Rate,” Allen H. Gould Trading Floor, accessed February 6, 2018, Thomson Reuters Eikon.

**Shortened Endnote Form (Subsequent Citing):**

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

**Bibliography Form:**

“China’s Inflation Rate.” Allen H. Gould Trading Floor. Accessed February 6, 2018. 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 Limited, *Ready: 2017 Annual Report – Financial Review* ([Brampton: Loblaw Companies Limited, 2018?]), 6-9.

**Shortened Endnote Form (Subsequent Citing):**

Loblaw, *2017 Annual Report*, 20.

**Bibliography Form:**

Loblaw Companies Limited. *Ready: 2017 Annual Report – Financial Review*. [Brampton: Loblaw Companies Limited, 2018?].

## Annual Reports (Online) (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 stable URL or database name to the report. 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).

In the example below, the annual report was found in SEDAR, a publicly available website. As such, a stable (root) URL was used at the end of the citation. If the annual report was retrieved from Mergent Online, a subscription database requiring a login, the database name would be used at the end of the citation. See the DOIs and URLs section of this Guide for more information.

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 Limited, "Ready: 2017 Annual Report – Financial Review," February 22, 2018, 22-23, accessed May 6, 2018, <https://www.sedar.com>.

### Shortened Endnote Form (Subsequent Citing):

Loblaw, "2017 Annual Report," 18.

### Bibliography Form:

Loblaw Companies Limited. "Ready: 2017 Annual Report – Financial Review." February 22, 2018. Accessed May 6, 2018. <https://www.sedar.com>.

## Articles (Printed)

### Article or Chapter in a Printed Edited 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.

### Shortened Endnote Form (Subsequent Citing):

Wells, "Climate Change and Business Valuation Techniques," 260.

### Bibliography 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 or more authors, cite only the first-listed author, followed by et al. ("and others") in the endnotes. 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.

### Endnote Form (First Citing):

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

### Shortened Endnote Form (Subsequent Citing):

Small, "Boomers," 39.

### Bibliography 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.

### Shortened Endnote Form (Subsequent Citing):

Dalglish, "Jolts of Asian Energy," 48.

### Bibliography 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.

### Shortened Endnote Form (Subsequent Citing):

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

**Bibliography 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 stable URL (DOI preferred). NOTE: If an article has more than four authors, cite only the first-listed author, followed by et al. ("and others") in the endnotes. 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.*

**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, 2017, <https://doi.org/10.1007/s10551-010-0649-0>.

**Shortened Endnote Form (Subsequent Citing):**

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

**Bibliography 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, 2017. <https://doi.org/10.1007/s10551-010-0649-0>.

**Article from an Online Journal in a Database (e.g., Business Source Premier, 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 database name. NOTE: If an article has more than four authors, cite only the first-listed author, followed by et al. ("and others") in the endnotes. 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.*

**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, 2018, Business Premium Collection.

**Shortened Endnote Form (Subsequent Citing):**

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

**Bibliography 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, 2018. Business Premium Collection.

**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 stable URL (DOI preferred). NOTE: Even if a magazine is numbered by volume and issue, include date of publication only.*

**Endnote Form (First Citing):**

Claire Brownell, "Charities of the Year: Our Annual Picks of Canada's Most Efficient and Accountable Charities," *Financial Post Magazine*, December 7, 2017, accessed January 2, 2018, <http://business.financialpost.com/financial-post-magazine/charities-of-the-year-our-annual-picks-of-canadas-most-efficient-and-accountable-charities>.

**Shortened Endnote Form (Subsequent Citing):**

Brownell, "Charities of the Year," World Wide Web.

**Bibliography Form:**

Brownell, Claire. "Charities of the Year: Our Annual Picks of Canada's Most Efficient and Accountable Charities." *Financial Post Magazine*, December 7, 2017. Accessed January 2, 2018. <http://business.financialpost.com/financial-post-magazine/charities-of-the-year-our-annual-picks-of-canadas-most-efficient-and-accountable-charities>.

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

*Include author(s), article title (in quotation marks), magazine title (in italics), date of publication, page number(s) of article, access date, and database name. 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, 2017, Business Source Premier.

**Shortened Endnote Form (Subsequent Citing):**

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

**Bibliography Form:**

Ulrich, David, and Norm Smallwood. "Building a Leadership Brand." *Harvard Business Review*, July/August 2007, 92-100. Accessed December 20, 2017. Business Source Premier.

**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 stable URL (DOI preferred). 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):**

Dianne Buckner, "Cannabis Entrepreneurs Set Sights on Non-Smokers," CBC News, June 5, 2018, accessed June 20, 2018, <http://www.cbc.ca/news/business/cannabis-beverages-for-non-smokers-1.4687403>.

**Shortened Endnote Form (Subsequent Citing):**

Buckner, "Cannabis Entrepreneurs," World Wide Web.

**Bibliography Form:**

Buckner, Dianne. "Cannabis Entrepreneurs Set Sights on Non-Smokers." CBC News, June 5, 2018. Accessed June 20, 2018. <http://www.cbc.ca/news/business/cannabis-beverages-for-non-smokers-1.4687403>.

**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 database name. 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.

**Shortened Endnote Form (Subsequent Citing):**

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

**Bibliography 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, "Organizations Don't Change Until People Do," *HR Bartender* (blog), March 6, 2018, accessed April 11, 2018, <https://www.hrbartender.com/2018/training/organizations-dont-change-people/>.

### **Shortened Endnote Form (Subsequent Citing):**

Lauby, "Organizations Don't Change," blog.

### **Bibliography Form:**

Lauby, Sharlyn. "Organizations Don't Change Until People Do." *HR Bartender* (blog). March 6, 2018. Accessed April 11, 2018. <https://www.hrbartender.com/2018/training/organizations-dont-change-people/>.

## 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):**

Joe Truss, March 27, 2018 (2:44 p.m.), comment on Sharlyn Lauby, "Organizations Don't Change Until People Do," *HR Bartender* (blog), March 6, 2018, accessed April 15, 2018, <https://www.hrbartender.com/2018/training/organizations-dont-change-people/>.

### **Shortened Endnote Form (Subsequent Citing):**

Truss, comment on Lauby, "Organizations Don't Change," blog.

### **Bibliography Form:**

Truss, Joe. March 27, 2018 (2:44 p.m.) Comment on Lauby, Sharlyn. "Organizations Don't Change Until People Do." *HR Bartender* (blog). March 6, 2018. Accessed April 15, 2018. <https://www.hrbartender.com/2018/training/organizations-dont-change-people/>.

## 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.

**Shortened Endnote Form (Subsequent Citing):**

Auletta, *Googled*, 43.

**Bibliography 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.

**Shortened Endnote Form (Subsequent Citing):**

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

**Bibliography 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 or more authors, cite only the first-listed author, followed by *et al.* ("and others") in the endnotes. 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.*

**Endnote Form (First Citing):**

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

**Shortened Endnote Form (Subsequent Citing):**

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

**Bibliography 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.

**Shortened Endnote Form (Subsequent Citing):**

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

**Bibliography 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.

**Shortened Endnote Form (Subsequent Citing):**

Johns and Saks, *Organizational Behaviour*, 37.

**Bibliography 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 or more authors, cite only the first-listed author, followed by et al. ("and others") in the endnotes. 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.

### Endnote Form (First Citing):

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

### Shortened Endnote Form (Subsequent Citing):

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

### Bibliography 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.

### Shortened Endnote Form (Subsequent Citing):

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

### Bibliography Form:

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

## Books (Online)

Online books (or e-books) are typically cited like their print counterparts with the addition of online access information at the end of the citation. For additional guidelines, refer to the Books (Printed) section of this Guide.

For books consulted online, include a stable URL (DOI preferred) or the database name (e.g., ProQuest Ebook Central). For other types of e-books, name the format (e.g., Kindle). NOTE: If fixed page numbers are unavailable, include the number of a chapter (e.g., chap. 11), section or other easily recognizable locator instead.

*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 stable URL (DOI preferred), format or database/platform name.*

*In this example, the e-book is listed in McMaster's library catalogue and is accessible by subscription and login through the ProQuest Ebook Central database. See the DOIs and URLs section of this Guide for more information.*

**Endnote Form (First Citing):**

Daniel S. Hamermesh, *Beauty Pays: Why Attractive People Are More Successful* (Princeton: Princeton University Press, 2011): 23, accessed June 10, 2018, ProQuest Ebook Central.

**Shortened Endnote Form (Subsequent Citing):**

Hamermesh, *Beauty Pays*, 89.

**Bibliography Form:**

Hamermesh, Daniel S. *Beauty Pays: Why Attractive People Are More Successful*. Princeton: Princeton University Press, 2011. Accessed June 10, 2018. ProQuest Ebook Central.

## **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., [2018?]).

**Shortened Endnote Form (Subsequent Citing):**

Kellogg Canada Inc., [Untitled Promotional Brochure].

**Bibliography Form:**

Kellogg Canada Inc. [Untitled Promotional Brochure]. Etobicoke: Kellogg Canada Inc., [2018?].

## **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.

**Shortened Endnote Form (Subsequent Citing):**

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

**Bibliography 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.

**Shortened Endnote Form (Subsequent Citing):**

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

**Bibliography 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.

**Shortened Endnote Form (Subsequent Citing):**

Himelstein, "Yahoo," 58.

**Bibliography 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.

## 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.

### **Shortened Endnote Form (Subsequent Citing):**

Jenkins, *Conflict and Crisis*, 132.

### **Bibliography 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, 2018), accessed March 8, 2018, <http://avenue.mcmaster.ca>.

### **Shortened Endnote Form (Subsequent Citing):**

Cossa, “Forms of Business Ownership,” lecture.

### **Bibliography Form:**

Cossa, Rita. “Commerce 1E03: Forms of Business Ownership.” Lecture. McMaster University, Hamilton, February 9, 2018. Accessed March 8, 2018. <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, 2018.

**Shortened Endnote Form (Subsequent Citing):**

White, letter, March 15, 2018.

**Bibliography Form:**

White, Walter. Chief Executive Officer, Crystal Blue Persuasion, Ltd. Letter. March 15, 2018.

**Podcasts**

*Include author or speaker's name(s), title of the podcast (in quotation marks), broadcast date, title of podcast series (in italics), producer, medium, format, running time, access date, and URL.*

**Endnote Form (First Citing):**

Jacob Goldstein and David Kestenbaum, "Episode 671: An Insider Trader Tells All," March 23, 2018, in *Planet Money*, produced by NPR, podcast, MP3 audio, 19:42, accessed June 30, 2018, <https://www.npr.org/sections/money/2018/03/23/596533461/episode-671-an-insider-trader-tells-all>.

**Shortened Endnote Form (Subsequent Citing):**

Goldstein and Kestenbaum, "An Insider Trader Tells All," podcast.

**Bibliography Form:**

Goldstein, Jacob, and David Kestenbaum. "Episode 671: An Insider Trader Tells All." March 23, 2018. In *Planet Money*. Produced by NPR. Podcast. MP3 audio. 19:42. Accessed June 30, 2018. , <https://www.npr.org/sections/money/2018/03/23/596533461/episode-671-an-insider-trader-tells-all>.

**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 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, "Canadian Industrial Outlook: Food Services-Winter 2018," April 17, 2018, 4-5, accessed September 30, 2018, Conference Board of Canada e-Library.

**Shortened Endnote Form (Subsequent Citing):**

Meyer-Robinson, "Food Services-Winter 2018," 3.

**Bibliography Form:**

Meyer-Robinson, Robert. "Canadian Industrial Outlook: Food Services-Winter 2018." April 17, 2018. Accessed September 30, 2018. 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).

### **Shortened Endnote Form (Subsequent Citing):**

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

### **Bibliography Form:**

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

## Social Media Posts (e.g., Facebook, Instagram, Twitter, etc.)

*Include author(s), screen name (if any) in parentheses, text of the post (quote up to the first 160 characters, including spaces, capitalized as in the original), type of post (i.e., name of social media service with description if relevant, e.g., Instagram photo), date and time of posting, access date, and URL. NOTE: If citing an entire social networking site (not a specific post), follow the generic online format noted in the Web Pages/Website section of this Guide.*

### **Endnote Form (First Citing):**

Arlene Dickinson (@ArleneDickinson), "Hope is hard to hold on to but don't ever let it go," Twitter, May 2, 2014, 11:28 a.m., accessed August 25, 2017, <https://twitter.com/ArleneDickinson/status/462297488146173952>.

### **Shortened Endnote Form (Subsequent Citing):**

Dickinson, "Hope is hard to hold on to."

### **Bibliography Form:**

Dickinson, Arlene (@ArleneDickinson). "Hope is hard to hold on to but don't ever let it go." Twitter, May 2, 2014, 11:28 a.m. Accessed August 25, 2017. <https://twitter.com/ArleneDickinson/status/462297488146173952>.

## Videos (DVDs/Videocassettes)

*Publication details for these materials generally follow that of books, with the addition of DVD or Videocassette (VHS) at the end of the citation. NOTE: To cite a video available online, use the format noted under the Videos (Online) section of this Guide.*

*Include name of person primarily responsible for the content (e.g., director (dir.)), title of work (in italics), original release date, location of distributor, name of distributor, release date, medium.*

**Endnote Form (First Citing):**

Jason Reitman, dir., *Up in the Air* (2009; Hollywood: Paramount Home Entertainment, 2010), DVD.

**Shortened Endnote Form (Subsequent Citing):**

Reitman, *Up in the Air*, DVD.

**Bibliography Form:**

Reitman, Jason, dir. *Up in the Air*. 2009; Hollywood: Paramount Home Entertainment. 2010. DVD.

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

*Include author(s), title in quotation marks, medium/format, running time, publishing organization or name of website, date of video or posting, access date, and URL or database name. NOTE: If citing an online video site or page rather than a single or specific video, follow the generic online format noted in the Web Pages/Websites section of this Guide.*

**Endnote Form (First Citing):**

John Doerr, "Why the Secret to Success is Setting the Right Goals," video, 11:38, TED, April 2018, accessed May 30, 2018, [https://www.ted.com/talks/john\\_doerr\\_why\\_the\\_secret\\_to\\_success\\_is\\_setting\\_the\\_right\\_goals](https://www.ted.com/talks/john_doerr_why_the_secret_to_success_is_setting_the_right_goals).

**Shortened Endnote Form (Subsequent Citing):**

Doerr, "Secret to Success," video.

**Bibliography Form:**

Doerr, John. "Why the Secret to Success is Setting the Right Goals." Video, 11:38. TED, April 2018. Accessed May 30, 2018. [https://www.ted.com/talks/john\\_doerr\\_why\\_the\\_secret\\_to\\_success\\_is\\_setting\\_the\\_right\\_goals](https://www.ted.com/talks/john_doerr_why_the_secret_to_success_is_setting_the_right_goals).

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

*Include author(s)(corporate or individual), title of web page (in quotation marks), publishing organization or name of website, 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):**

Apple Inc., "Apple Leadership," Apple Inc., 2018, accessed February 6, 2018, <https://www.apple.com/ca/leadership/>.

**HTML Shortened Endnote Form (Subsequent Citing):**

Apple, "Apple Leadership," World Wide Web.

**HTML Bibliography Form:**

Apple Inc. "Apple Leadership." Apple Inc. 2018. Accessed February 6, 2018. <https://www.apple.com/ca/leadership/>.

**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, 2018, [http://www.timhortons.com/ca/en/pdf/Ingredient\\_Information\\_-\\_Canada.pdf](http://www.timhortons.com/ca/en/pdf/Ingredient_Information_-_Canada.pdf).

**Shortened Endnote Form (Subsequent Citing):**

Tim Hortons, "Ingredient Information," 16.

**Bibliography Form:**

Tim Hortons. "Ingredient Information." Tim Hortons. June 2016. Accessed July 1, 2018. [http://www.timhortons.com/ca/en/pdf/Ingredient\\_Information\\_-\\_Canada.pdf](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 2018*, 39th ed. (Toronto: Grey House Publishing, 2018), 267.

**Shortened Endnote Form (Subsequent Citing):**

*Associations Canada 2017*, 175.

**Bibliography Form:**

*Associations Canada 2018*. 39th ed. Toronto: Grey House Publishing, 2018.

## **Business Source Premier (Reports in a Database)**

*NOTE: The content in this database is only available by subscription and accessible by login, so the database name, rather than a stable URL, is included at the end of the citation.*

### **Endnote Form (First Citing):**

MarketLine, "MarketLine Industry Profile: Airlines in Canada," April 2018, 12-14, accessed June 13, 2018, Business Source Premier.

### **Shortened Endnote Form (Subsequent Citing):**

MarketLine, "Airlines in Canada," 15.

### **Bibliography Form:**

MarketLine. "MarketLine Industry Profile: Airlines in Canada." April 2018. Accessed June 13, 2018. Business Source Premier.

## **Canadian Business Database (Books, Online)**

*NOTE: This source is only available by subscription and accessible by login, so the database name/platform, rather than a stable URL, is included at the end of the citation.*

### **Endnote Form (First Citing):**

*Canadian Business Database* (Papillion: Infogroup, 2018), accessed August 16, 2018, ReferenceUSA.

### **Shortened Endnote Form (Subsequent Citing):**

*Canadian Business Database*, World Wide Web.

### **Bibliography Form:**

*Canadian Business Database*. Papillion: Infogroup, 2018. Accessed August 16, 2018. ReferenceUSA.

## **CANSIM (Table from a Website)**

### **Endnote Form (First Citing):**

Statistics Canada, "Table 355-0008: Food Services and Drinking Places, Summary Statistics, Annual (Dollars)," Statistics Canada, accessed September 10, 2017, <http://www5.statcan.gc.ca/cansim/home-accueil?lang=eng>.

### **Shortened Endnote Form (Subsequent Citing):**

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

**Bibliography Form:**

Statistics Canada. "Table 355-0008: Food Services and Drinking Places, Summary Statistics, Annual (Dollars)." Accessed September 10, 2017.  
<http://www5.statcan.gc.ca/cansim/home-accueil?lang=eng>.

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

*NOTE: This source is only available by subscription and accessible by login, so the database name/platform rather than a stable URL is included at the end of the citation.*

**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, 2018), accessed March 19, 2018, Accounting & Assurance.

**Shortened Endnote Form (Subsequent Citing):**

CPA, "Section 1101," World Wide Web.

**Bibliography 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, 2018. Accessed March 19, 2018. Accounting & Assurance.

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

*NOTE: The content in this database is only available by subscription and accessible by login, so the database name, rather than a stable URL, is included at the end of 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.

**Shortened Endnote Form (Subsequent Citing):**

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

**Bibliography 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: The content in this database is only available by subscription and accessible by login, so the database name, rather than a stable URL, is included at the end of the citation NOTE: 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 2018, accessed June 28, 2018, Economist Intelligence Unit.

### **Shortened Endnote Form (Subsequent Citing):**

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

### **Bibliography Form:**

Economist Intelligence Unit. "Country Report: United Kingdom." April 2018. Accessed June 28, 2018. Economist Intelligence Unit.

## **Hoover's (Reports in a Database)**

*NOTE: The content in this database is only available by subscription and accessible by login, so the database name, rather than a stable URL, is included at the end of the citation*

### **Endnote Form (First Citing):**

Hoover's Inc., "Indigo Books & Music Inc. Profile," *Hoover's Company Records*, December 23, 2017, 10-12, accessed July 15, 2018, Entrepreneurship Database.

### **Shortened Endnote Form (Subsequent Citing):**

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

### **Bibliography Form:**

Hoover's Inc. "Indigo Books & Music Inc. Profile" *Hoover's Company Records*. December 23, 2017. Accessed July 15, 2018. Entrepreneurship Database.

## **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>.

### **Shortened Endnote Form (Subsequent Citing):**

UNDP, *Human Development Report 2016*, 155.

### **Bibliography 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)**

*NOTES: If viewing the HTML version of the report, use "World Wide Web" for subsequent endnotes. The content in this database is only available by subscription and accessible by login, so the database name, rather than a stable URL is included at the end of the citation.*

### **Endnote Form (First Citing):**

Lucie Couillard, "IBISWorld Industry Report 31212CA: Breweries in Canada," April 2018, 18-21, accessed July 12, 2018, IBISWorld.

### **Shortened Endnote Form (Subsequent Citing):**

Couillard, "Breweries in Canada," 4.

### **Bibliography Form:**

Couillard, Lucie. "IBISWorld Industry Report 31212CA: Breweries in Canada." April 2018. Accessed July 12, 2018. IBISWorld.

## **Lynda.com (Online Video in a Database)**

*NOTE: The content in this database is only available by subscription and accessible by login, so the database name, rather than a stable URL is included at the end of the citation.*

### **Endnote Form (First Citing):**

Todd Dewett, "Giving Your Elevator Pitch," video, 13:01, LinkedIn Corporation, October 13, 2014, accessed September 12, 2017, Lynda.com.

### **Shortened Endnote Form (Subsequent Citing):**

Dewett, "Giving Your Elevator Pitch," video.

### **Bibliography Form:**

Dewett, Todd. "Giving Your Elevator Pitch." Video, 13:01. LinkedIn Corporation, October 13, 2014. Accessed September 12, 2017. Lynda.com.

## **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.

**Shortened Endnote Form (Subsequent Citing):**

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

**Bibliography 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: The content in this database is only available by subscription and accessible by login, so the database name, rather than a stable URL, is included at the end of the citation.*

**Endnote Form (First Citing):**

Packaged Facts, "Gen Z and Millennials as Pet Market Consumers: Dogs, Cats, Other Pets," February 2018, 68-70, accessed May 7, 2018, MarketResearch.com Academic.

**Shortened Endnote Form (Subsequent Citing):**

Packaged Facts, "Gen Z and Millennials as Pet Market Consumers," 38.

**Bibliography Form:**

Packaged Facts. "Gen Z and Millennials as Pet Market Consumers: Dogs, Cats, Other Pets." February 2018. Accessed May 7, 2018. MarketResearch.com Academic.

**Mergent Industry Reports within Factiva (Reports in a Database)**

*NOTE: The content in this database is only available by subscription and accessible by login, so the database name rather than a stable URL is included at the end of the citation*

**Endnote Form:**

Mergent, Inc. "Biotechnology-North America," *Mergent Industry Reports*, March 1, 2018, accessed June 15, 2018, Factiva.

**Shortened Endnote Form (Subsequent Citing):**

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

**Bibliography Form:**

Mergent, Inc. "Biotechnology-North America." *Mergent Industry Reports*, March 1, 2018. Accessed June 15, 2018. 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>.

### **Shortened Endnote Form (Subsequent Citing):**

Statistics Canada, NAICS Canada 2017, World Wide Web.

### **Bibliography 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)

*NOTES: If using the PDF version of a report, include the page number(s) in the endnotes. The content in this database is only available by subscription and accessible by login, so the database name, rather than a stable URL, is included at the end of the citation.*

### **Endnote Form (First Citing):**

Euromonitor International, "Consumer Lifestyles in Canada," June 19, 2017, accessed July 23, 2018, Passport.

### **Shortened Endnote Form (Subsequent Citing):**

Euromonitor, "Consumer Lifestyles in Canada," World Wide Web.

### **Bibliography Form:**

Euromonitor International. "Consumer Lifestyles in Canada." June 19, 2017. Accessed July 23, 2018. Passport.

## SIC Code Manual (Books, Printed – No Author)

### **Endnote Form (First Citing):**

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

**Shortened Endnote Form (Subsequent Citing):**

*Standard Industrial Classification Manual, 22.*

**Bibliography Form:**

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

**Statista (Table in a Database)**

*NOTE: The content in this database is only available by subscription and accessible by login, so the database name, rather than a stable URL, is included at the end of the citation.*

**Endnote Form (First Citing):**

Social Media Examiner, "Planned Changes in Future Use of Selected Social Media for Marketing Purposes Worldwide as of January 2018," May 2018, accessed July 4, 2018, Statista.

**Shortened Endnote Form (Subsequent Citing):**

Social Media Examiner, "Future Use of Selected Social Media," World Wide Web.

**Bibliography Form:**

Social Media Examiner. "Planned Changes in Future Use of Selected Social Media for Marketing Purposes Worldwide as of January 2018." May 2018. Accessed July 4, 2018. Statista.

**Thomson ONE (Reports in a Database)**

*NOTE: The content in this database is only available by subscription and accessible by login, so the database name, rather than a stable URL, is included at the end of 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.

**Shortened Endnote Form (Subsequent Citing):**

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

**Bibliography Form:**

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

## World Bank DataBank (Web Pages/Website)

*NOTE: The table at this publicly available website does not provide stable URLs, so the root URL 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, 2000-2016," WorldBank Group, accessed July 11, 2018, <http://databank.worldbank.org/data/source/world-development-indicators>.

### **Shortened Endnote Form (Subsequent Citing):**

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

### **Bibliography Form:**

World Bank. "Individuals Using the Internet (% of Population) in Iceland, 2000-2017." WorldBank Group. Accessed July 11, 2018. <http://databank.worldbank.org/data/source/world-development-indicators>.

## World Factbook (Web Pages/Websites)

### **Endnote Form (First Citing):**

Central Intelligence Agency, "The World Factbook: Kenya," CIA, June 4, 2018, accessed June 13, 2018, <https://www.cia.gov/library/publications/resources/the-world-factbook/geos/ke.html>.

### **Shortened Endnote Form (Subsequent Citing):**

CIA, "The World Factbook: Kenya," World Wide Web.

### **Bibliography Form:**

Central Intelligence Agency. "The World Factbook: Kenya." CIA. June 4, 2018. Accessed June 13, 2018. <https://www.cia.gov/library/publications/resources/the-world-factbook/geos/ke.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, 2018, Hamilton. Participants: Ida Smith 905-525-9137, Steve Halback 905-731-5885, Julie Lau 905-521-9438, Niles Marshall 905-526-1749, Mina Terrant 905-691-9191, and Larry Wiebe 905-525-9156.

**Shortened Endnote Form (Subsequent Citing):**

Snack Food Preferences, focus group, March 30, 2018.

**Bibliography Form:**

Snack Food Preferences. Focus group. March 30, 2018. Hamilton. Participants: Ida Smith 905-525-9137, Steve Halback 905-731-5885, Julie Lau 905-521-9438, Niles 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]).*

### Email Interview

*Include the full name of the person interviewed, position, company name, date of interview, and email address of the respondent.*

**Endnote Form (First Citing):**

Lester Nygaard, Sales Representative, Bo Munk Insurance Shop, email interview, October 5, 2017, lester.nygaard@hotmail.com.

**Shortened Endnote Form (Subsequent Citing):**

Nygaard, email interview, October 5, 2017.

**Bibliography Form:**

Nygaard, Lester. Sales Representative, Bo Munk Insurance Shop. Email interview. October 5, 2017. 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.

**Shortened Endnote Form (Subsequent Citing):**

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

**Bibliography 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, 2017, Hamilton, 905-555-9140, ext. 24340.

**Shortened Endnote Form (Subsequent Citing):**

Owens, in-person interview, November 27, 2017.

**Bibliography Form:**

Owens, Bobby. President, Basement Bar Records. In-person interview. November 7 and  
27, 2017. 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, 2018, 905-  
555-1643.

**Shortened Endnote Form (Subsequent Citing):**

Howland, phone interview, March 9, 2018.

**Bibliography Form:**

Howland, Rodney. Owner, Back Forty Farm. Phone interview. March 9, 2018. 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, 2017, Sobeys (905 Rymal Rd. E., Hamilton), Franco's No Frills (435 Main St. E., Hamilton), and Fortinos (54 Wilson St. W., Hamilton).

**Shortened Endnote Form (Subsequent Citing):**

Laundry Detergent Purchases, observation research, November 21-24, 2017.

**Bibliography Form:**

Laundry Detergent Purchases. Observation research. November 21-24, 2017. 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, 2018, Hamilton.

**Shortened Endnote Form (Subsequent Citing):**

Chewing Gum Preferences, survey, January 13, 2018.

**Bibliography Form:**

Chewing Gum Preferences. Survey. January 13, 2018. 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

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

<sup>2</sup>Statistics 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, 2018, <http://www23.statcan.gc.ca/imdb/p3VD.pl?Function=getVD&TVD=307532&CVD=307548&CPV=524111&CST=01012017&CLV=5&MLV=5>.

<sup>3</sup>MarketLine, "MarketLine Industry Profile: Life Insurance in Canada," October 2017, 9-10, accessed September 25, 2018, Business Source Premier.

<sup>4</sup>"Financial Data for Life Insurance Companies," Office of the Superintendent of Financial Institutions, accessed June 10, 2018, <http://www.osfi-bsif.gc.ca/eng/wt-ow/Pages/FINDAT-li.aspx>.

<sup>5</sup>Robert 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.

<sup>6</sup>"Sun Life Financial Inc.," Allen H. Gould Trading Floor, accessed September 29, 2018, Bloomberg.

<sup>7</sup>Sun Life Financial Inc., "Consolidated Financial Statements and Notes: Annual Report 2017," Sun Life Financial, 90, accessed June 6, 2018, [http://cdn.sunlife.com/static/Global/Investors/Financial%20results%20and%20reports/Annual%20reports/6\\_SLF\\_ENG\\_Consolidated%20Financial%20Statements%20and%20notes\\_2017.pdf](http://cdn.sunlife.com/static/Global/Investors/Financial%20results%20and%20reports/Annual%20reports/6_SLF_ENG_Consolidated%20Financial%20Statements%20and%20notes_2017.pdf).

<sup>8</sup>Sun Life Financial Inc., "Annual Report 2017," 92.

<sup>9</sup>Libby et al., *Financial Accounting*, 619.

<sup>10</sup>MarketLine, "Company Profile: Sun Life Financial Inc.," April 1, 2018, 4, accessed September 24, 2018, Business Source Premier.

<sup>11</sup>Sun Life Financial Inc., "Building Sustainable Shareholder Value, First Quarter 2017," Sun Life Financial, 6-7, accessed June 6, 2018, [http://cdn.sunlife.com/static/Global/Investors/Financial%20results%20and%20reports/Quarterly%20reports/pa\\_e\\_Q117\\_investor\\_presentation.pdf](http://cdn.sunlife.com/static/Global/Investors/Financial%20results%20and%20reports/Quarterly%20reports/pa_e_Q117_investor_presentation.pdf).



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