BASIC DOCUMENTATION GUIDELINES
How to Write Effectively When Using Sources

This resource explains the basic documentation guidelines of APA Style according to the *Publication Manual of the American Psychological Association* (APA, 7th ed.).

Contents

What is Documentation?

Documentation is how we give credit to others for their contributions to our work. We must document the ideas, theories, definitions, data, images, and other information in our writing that originated with others. For example, our work must include documentation when we quote, paraphrase, or summarize another's ideas or when using data from others' research. Documentation means including select information about a source "in text" and including additional bibliographic information about that source in a reference list entry.

Why is Documentation Important?

1. Documenting sources is how we acknowledge and give credit to those individuals or groups whose information appears in our work. When we use an individual's or group's ideas, words, artwork, or anything else, we are to give credit to the source of that information.
2. Documentation provides readers with the specifics needed to retrieve the same source and do more research on their own. The in-text citation shows readers where certain ideas or words in your paper came from, and from the reference entry, readers have all of the information they need to retrieve a source.
3. Documentation additionally guards against plagiarism, which is the act of using another's intellectual property without proper attribution. Plagiarism deprives sources proper credit for their work, compromises a writer's integrity and reputation, and usually results in serious consequences, both within the university and in the world of work.

What is Plagiarism?

Plagiarism is using another's words, ideas, results, or images without giving appropriate credit to that person, therefore, giving the impression that it is your own work. Plagiarism can be intentional or unintentional. It can be the result of failing to give credit to someone for their ideas and/or failing to effectively summarize or paraphrase a quote. See the Code of Student Conduct for more information about academic integrity and plagiarism.

Self-Plagiarism

Self-plagiarism is recycling a paper (or large parts of a paper) from a previous class without both permission and revision to make it a new paper. According to the University Code of Student Conduct, students cannot use the same paper for credit for more than one assignment. If you would like to use and expand on an assignment from a previous class, you must first submit your original assignment to your instructor and ask for permission to continue your research and writing on the topic; however, your new assignment should be significantly different from the previous one.

In a professional sense, self-plagiarism is a serious offense because journals that publish your work want the most current research, not previously published research. If you do not let publishers know that your work was previously published, and they run your piece only to find out later that it was published in another journal, you will likely not ever be considered for publication again by either journal unless a publisher specifically says that multiple submissions or previously published manuscripts are acceptable.

Coursework Resubmission Policy

The Coursework Resubmission Policy allows students who are retaking a Purdue University Global Course after a failed attempt to reuse previous course work with proper citation and advance notice to the instructor. Read the Code of Student Conduct and Coursework Resubmission Policy Resource for details and stipulations. *Note: This policy does not apply to Concord Law students.*

When Do We Document?

Whenever information does not originate in your own mind, you must document it. This includes when you use someone's words (quotations), ideas (paraphrases and summaries), and illustrations (graphics, tables, figures, and artwork).

Common Knowledge: There are situations when information is common knowledge and does not require documentation. Common knowledge refers to relevant and objective information that is widely known and accepted as true by a certain group of people. Common knowledge is context specific. If information is determined to be common knowledge for your writing context, it does not need to be cited. Ask your faculty member if you are unsure.

Criteria for Common Knowledge:

- The audience should already know this information (e.g., a red traffic light means "stop" or there are four seasons in a year).
- The same information can be found in multiple, general information sources (e.g., a state flower or a state bird will be the same across general information sources).
- The information comes from folklore, mythology, or well-known stories that your audience would be familiar with because of a shared education or culture.
- The facts are well known in your field of study and will be well known to your audience.

Professional Experience and Common Knowledge: You may have a great deal of experience in your field, and something may be common knowledge to you but not to the audience for whom you are writing. Always be sure you adequately cite appropriate information for your academic writing and follow assignment directions. If your assignment allows, you may cite your own experience, but it may be good to cite your experience using phrasing such as the following: *In my 20 years as a nurse, I have seen . . .*

Quoting or Paraphrasing Another's Statement or Interpretation of Common Knowledge: If you take a well-known fact word for word from a source, a citation and reference list entry is required to attribute the wording to the source and to avoid plagiarism. If you use another writer's interpretation of common knowledge, that writer needs to be credited in an in-text citation and reference list entry, as the interpretation is not common knowledge or original to your writing.

Statistics: Statistics are not common knowledge since statistical information is typically not equally represented across general information sources. The source of the statistic, either as a primary or secondary source, needs to be cited.

Quoting

Quoting refers to using a source without altering it in any way; passages are used from a source word-for-word. In college writing, quotations are used sparingly since too many quotations can make a paper sound like a summary of another person's work rather than your original work. Your own ideas can become diluted in a sea of other authors' words with too many quotes. Quotations additionally include quotation marks and in-text citations, which can slow down the reading. Quotations also interject another author's voice in your paper, and the switch from your voice to another's can also slow down the reading.

Guidelines for When to Quote

1. When you are critiquing or agreeing with someone's exact words. For instance, if you wanted to argue that a movie reviewer's comments were biased, you would want to quote the exact words of the reviewer, so your reader would understand your comment.
2. When you want to include dialogue in your paper. For example, if you wanted to highlight a point someone made in an interview, you would want to quote the exact words spoken in the interview.
3. When the original author's words are so eloquent, profound, or unique (such as research results) that you cannot find a way to paraphrase and maintain the same meaning or impact of the original passage, you would want to quote those words.

Steps for Quoting

1. Copy the words exactly as they are written in the original piece.
2. Enclose the quote in quotation marks, which look like this: "quotation."
3. Include an in-text citation with the quotation and a reference entry on the reference list.
4. Integrate the quote into the narrative of the paragraph by introducing it with a signal phrase.

Integrating Quotations

When quoting, use signal phrases in the narrative of the sentence to integrate the ideas of others in your writing instead of just dropping quotations into your text as in this example:

"Most conventional healthcare providers prescribe medicine that only alleviates a patient's symptoms" (Jones, 2020, p. 3). "Alternative medicine seeks to help patients prevent illness by understanding underlying causes" (Barter, 2019, p. 99). Some people think there is a good way to balance the two for optimal health.

Although the last sentence in the paragraph suggests the two quotations are on the same topic, the relationship between the quotations is unclear as is how those points led to the concluding thought.

A revision of the previous paragraph that integrates the quotes might look something like this:

Conventional medicine is often viewed as providing immediate relief for illness. **Jones (2020)**, a 13-year physician in New York City, **contended** that "Most conventional healthcare providers prescribe medicine that only alleviates a patient's symptoms" (p. 3). This sentiment is echoed by **Barter (2019) who explained that** "Alternative medicine seeks to help patients prevent illness by understanding underlying causes" (p. 99). It seems logical, therefore, that optimal health can be achieved by balancing conventional and alternative approaches to medicine because they both have benefits to patients.

The signal phrases help develop and synthesize the ideas. Signal phrases also make the purpose of using the quotation clearer by indicating the position of the author as well as your neutrality, agreement, or disagreement.

Common Signal Phrase Words

Neutral

- Commented
- Described
- Explained
- Illustrated
- Noted
- Observed
- Pointed out
- Said

Shows Agreement

- Admitted
- Agreed
- Conceded

Shows Disagreement

- Defended
- Contended
- Held
- Insisted
- maintained

- Warned
- Suggested

Long or Block Quotations

In APA format, quotations that are 40 or more words are considered long or "block" quotations that must be set off from the rest of the paragraph in an indented "block." The block format makes it easier for readers to differentiate the quote from the rest of the text.

To format a block quote, you do not use quotation marks. Instead, you indent the quotation ½ inch from the left margin. The period is inserted at the end of the quotation, and the in-text citation goes after the period. The opposite is done for a short quotation where the end punctuation follows the parenthetical citation to enclose it inside the sentence: "Quote" (citation).

The following paragraph includes a block quote, which begins "The United States is. . .":

Example Paragraph With Blog Quote

Students do not necessarily have to be geographically placed all over the world in order to experience cross-cultural interactions because of the high rate of immigration worldwide. For instance,

The United States is in the midst of the largest wave of immigration in its history, with over a million new immigrants per year for a total foreign-born population of over 35 million people, equaling 12 percent of its total population. In Canada, Switzerland, and Australia the rates of immigration are nearly double the US rate. (Suárez-Orozco, 2017, p. 9)

Thus, the mobility of the world's population is providing opportunity for global instruction even within a country's own boundaries.

Analysis

Notice the paragraph continued after the quote. Quotes are more effectively integrated when the quoted information is followed by some analysis or commentary to help your reader understand its purpose or point in relationship to your own ideas.

⬆Paraphrasing

Writers can paraphrase sources by expressing the meaning of an original passage in their own words. Paraphrasing is preferred when you want to incorporate research into your writing. Paraphrasing

shows you understood what you read and therefore know what you are talking about, for you have taken what someone else said and rephrased it, so it sounds like you and so the idea fits seamlessly in your paper. When you paraphrase, you choose the vocabulary and writing style that would appeal to your intended readers (versus your source's intended readers). **Please note** that replacing a few words in an original passage or sentence with synonyms is **not** effective paraphrasing and could result in unintentional plagiarism, even when correct documentation is included.

Guidelines for Avoiding Plagiarism when Paraphrasing

1. When researching, record all or the information about a source in APA format at the top of your notebook page.
2. Read the original passage several times to completely understand the idea being expressed and the context in which the material is being used before paraphrasing it.
3. Write down in your own words the idea of the passage without looking back at the original.
4. Ensure the wording in the paraphrase captures the exact meaning of the original.
5. Ensure the paraphrase is being used in the same context and serves the same purpose as the original. Taking an idea out of context is faulty research as it changes the original intent, so you would no longer be paraphrasing what another person meant.
6. Ask someone else to read the original and then read the paraphrase and compare the meaning and context between the two.

Acceptable and Unacceptable Paraphrases

Original Passage Quoted

"Educational leaders posed with the task of integrating ethics into undergraduate general education curriculum are faced with finding faculty who are interested in the topic instead of forcing faculty who are not interested into teaching a subject they are not committed to" (Stevenson, 2019, p. 5).

Acceptable Paraphrase

When it comes to teaching ethics in undergraduate programs, it is preferable to use faculty who have a profound interest in the subject to teach such courses (Stevenson, 2019).

Unacceptable Paraphrase

Educational leaders have to find faculty who are interested in ethics instead of forcing teachers who are not interested in teaching a subject they are not committed to (Stevenson, 2019).

The acceptable paraphrase rewords the main idea of Stevenson's original passage about the effectiveness of using willing and interested faculty to teach ethics in undergraduate courses. The unacceptable paraphrase is plagiarized because too many words from the original passage are used without quotation marks around those words, so it does not give credit to the source for those words.

⬆ Summarizing

Writers can summarize a source by relating the main ideas of a text or passage in their own words. Summarizing is similar to paraphrasing in that you read information from a source and put it into your own words, but a summary differs from a paraphrase in the following ways:

- A summary is a condensed version of a long passage of writing.
- A summary captures only the main idea of a piece of writing.
- A summary helps you learn material through close reading in order to comprehend what the main points of a reading are and understand the material so well that you can express the main ideas in your own words instead of using someone else's words.

Example of Summarizing

Original Passage Quoted

Collaboration with others is part of living and working in the professional world. A high portion of our daily communication occurs in groups, such as family, coworkers, and friends. Regardless of career choice, it is likely that individuals will spend a considerable part of their personal and professional lives working in collaboration with others. The changing environment of the workplace has caused an increase in the use of virtual teams for collaborative projects. The major difference between a virtual team and a team that meets face-to-face is the distance that lies between members. It is distance that affects the interaction between group members. Technologies, such as teleconferencing, email, web enabled chat, groupware, and shared file programs, have made communication at a distance and virtual collaboration possible. Through technology, virtual teams are able to interact, complete projects, and resolve conflicts. (Turner et al., 2020, p. 167)

Step 1: First annotate the main ideas of the paragraph as shown here in italics:

Collaboration with others is part of living and working in the professional world. A high portion of our daily communication occurs in groups, such as family, coworkers, and friends. Regardless of career choice, it is likely that individuals will spend a considerable part of their personal and professional lives working in collaboration with others. *The changing environment of the workplace has caused an increase in the use of virtual teams for collaborative projects.* The major difference between a virtual team and a team that meets face-to-face is the distance that lies between members. *It is distance that affects the interaction between group members. Technologies,* such as teleconferencing, email, Web-enabled chat, groupware, and shared file programs, *have made communication at a distance and virtual collaboration possible.* Through technology, virtual teams are able to interact, complete projects, and resolve conflicts. (Turner et al., 2020, p. 167)

Step 2: Rewrite the annotated ideas in your own words and identify the source:

Summarized Passage

Turner et al. (2020) made the point that today's workplace is quite different than it was 20 years ago; more people are working remotely or companies are so large that they have different sites throughout the world. Turner et al. explained that this change in the workplace has increased the need for virtual teams; however, the need for collaboration has not changed. Distance can affect how well a group works together, but modern technologies have made communication with virtual team members possible and an effective means for getting the job done (Turner et al., 2020).

Analysis

Notice in the example that throughout the summary, the author is identified, so it is clear that the ideas in each sentence, while written with original wording, are the ideas of that author. Summarized material in your paper needs to be cited, just as paraphrased material needs to be cited, so readers know where the ideas in the text came from and where to retrieve the same source.

In-Text Citations

An in-text citation is a shortened version of a source's bibliographic information that is presented parenthetically or narratively. A parenthetical in-text citation includes information placed in parenthesis typically at the end of a sentence to indicate to readers that the information in that sentence was borrowed from someone else. A narrative in-text citation includes the author's name placed right in the narrative of the sentence like this: Bragdon (2020) argued that inertia when applied to human beings is the equivalent of lacking motivation.

The bibliographic information for both types of in-text citations is shortened because additional specifics needed to look up a source would interfere with reading your paper. In-text citation format varies depending on whether the citation is parenthetical or narrative as well as whether you are quoting or paraphrasing. The exact formatting of the citation may vary further if information such as the date of publication is missing. Most in-text citations in APA format will include the author's last name and the publication year in some manner.

The following is an example of a parenthetical in-text citation for a paraphrase or summary:

(Hannah, 2020).

If the information being cited was a quote, in addition to quotation marks ["…"] being put around the quoted text, the parenthetical citation would also include the page number:

(Hannah, 2020, p. 4).

A narrative citation for a paraphrase would simply name the author in the sentence and place the date of publication in parenthesis after the author's name as illustrated in this example:

According to Hannah (2020), ...

A narrative citation for a direct quote would simply include the page number after the direct quote: According to Hannah (2020), "the meaning of words evolves as culture changes" (p. 44).

If individual authors are not named, you would use the name of the sponsoring organization as the author. For example, if you were paraphrasing from this Basic Citation Guidelines writing guide, you would use the following format: (Purdue Global Writing Center, 2019).

If neither an author nor sponsoring organization is identified, you would instead enclose the title of the article in quotation marks along with year of publication as shown here: ("The Good Student," 2019). This shortened version of a source's bibliographic information in text is meant to be unobtrusive to the reader, whereas a reference entry is reserved for the reference list at the end of the paper.

Reference List Entries

A reference entry is a notation that provides all the information readers need if they want to retrieve an article, book, or other source cited in your paper. In APA format, these entries are listed on a separate page called references or reference list. Readers use in-text citations that align with reference entries at the end of the document. For instance, if an in-text citation looks like this: (Smith, 2018), a reader can turn to the reference list, scan down the entries s and look for the book or article written by an author with the last name Smith and published in the year 2018.

The information provided in a reference entry is based on the *type* of source it is because the way you find a book is different from the way you retrieve a website or an article from an online library database.

A sample reference entry in APA for a book looks like this:

Smith, T. (2018). *A life well-lived*. Insight Publications.

A sample reference entry for a webpage looks like this:

East Coast Gardeners Association. (2019). *Winter gardens.* http://www.eastcoastgardens.com/
wintergardens.html

The examples show how books are retrieved by looking up an author's name, the year the book was published, the title, and the publisher. This information is given to ensure the reader can find the same book that you used in your paper. A webpage, however, is an electronic source, so it is retrieved by

knowing the URL (web address) and the name of the author or organization that sponsors the website along with the title of the specific webpage.

Online Sources

Writers commonly conduct research online using library databases, websites, videos, and podcasts. To cite online sources, you follow APA's author-date citation format and then include additional information depending on the type of source. Here are some examples:

- Articles published online do not always have page numbers, so when quoting, you would provide the paragraph number instead: (Author, year, para. #).
- YouTube videos and podcasts do not have page or paragraph numbers, so when quoting from these sources, you include the timestamp, which indicates the time at which a direct quote appeared.

The references list at the end of the paper provides more complete information and that includes the author, publication year, title, and the retrieval information such as a DOI (digital object identifier) or the URL (uniform resource locator, i.e., website address).

The basic APA format for an article published on a webpage would like this this:

Author, A. A. (year). *Title of article.* http://www.webpageaddress

If your source is missing some of the information needed for an in-text citation and reference, the following serves as guidance on how to handle those situations.

No Author: Use the title in place of the author.

- For a paraphrase from an article with no author: ("Whales in the Ocean," 2020)
- For a quotation from a book with no author: (*Plant-Based Cooking,* 2020, para. 9)
- The reference list entry for an article with no author begins with the title in sentence case (capitalizing the first word only and any proper nouns):

  Whales in the ocean. (2020). *Ocean Life Magazine.* https://www.oceanlife.com

- The reference list entry for a book or other whole work without an author begins with the title in sentence case and italics:

  Plant-based cooking. (2020). https://www.plant-basedcookingebook.com

- Only use "Anonymous" as the author if the work specifically names the author as "Anonymous": (Anonymous, n.d.).

No date: Use n.d. in the date spot for both in-text citations and reference list entries. For example, an in-text citation would look like this: (Hendrix, n.d.).
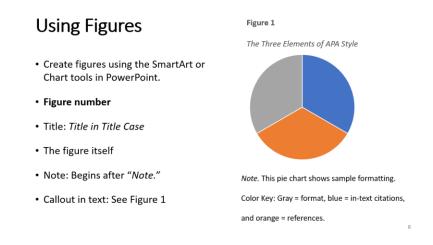
Tables and Figures

Tables and figures such as graphs, images, and artwork that you borrow from a source and insert in your paper must be cited and referenced according to the type of source the image was retrieved from. Additionally, these works require a copyright statement to indicate the work is permitted to be used.

Format for Using a Table or Figure in Your Writing

1. Provide the Table number or Figure number aligned left and in bold font.
2. Provide the title for the table or figure aligned left and in italics one double-spaced line below the figure number.
3. Provide the table or figure itself below the title.
4. As needed, provide a note below the table to explain any terms, symbols, and provide the copyright statement. The word "note" is capitalized and in italics followed by a period and then the note as shown in Figure 1.
5. Also, mention the figure in your text as done in number 4 of this list: "as shown in Figure 1".

Figure 1

How to Format Figures in a PowerPoint Presentation

Note. This screenshot shows how to format a figure in a PowerPoint. Adapted from *APA Style Formatting in PowerPoint,* by C. Cairns, 2020 (https://youtu.be/KDmCv6Ye1og). Copyright 2020 by Purdue Global Academic Success Center and Writing Center. Adapted with permission.

Analysis

In the example figure, the note begins with a description of the image followed by the copyright statement.

Copyright Statement Template

From [or Adapted from] *Title of Work*, by A. A. Artist, Year (DOI or URL). Copyright year by Copyright Holder or Copyright License or In the public domain. Reprinted or Adapted with permission [if permission was sought and granted].

Whenever inserting a figure or table into your paper, be sure to mention it in your paper by the figure number. Additionally, insert the figure or table as close as possible to where it is mentioned in the paper, so readers understand why it is there. Graphics are not to be used solely for aesthetic reasons but to illustrate a point or support the overall purpose of your writing.

⬆ Following Style Guidelines

Most style guides are written for particular disciplines; therefore, documentation rules and formats are designed for the kind of information used within that field. For instance, *Bluebook* is a style guide used in the legal field. Bluebook's style and format cater to displaying pertinent information for retrieving court cases, legislation, and briefs. On the other hand, *American Psychological Association* (APA) style is used in the social sciences and some health, business and technology fields. Readers in these fields are expecting writers to use the most current information from credible and verifiable sources, and APA is known as an author-date citation style.

Cross-Referencing

The key to properly documenting your sources is to learn how to cross-reference. This means that you take your source, a journal article, for instance, and you look up in your style guide how to cite a journal article—what elements to include in the citation and in what order to put them. It will also indicate the capitalization, font, and punctuation rules to follow. Here's an example:

Information available to you in a printed journal article

Paige Turner, "Writing in an Online Environment" in the *Journal of Online Writing* published in May of 2020. The journal volume is 3, and the issue number is 2. The article is 17 pages long beginning on page 17 and ending on page 34. The journal article has a doi that is https://doi.org/12.1212/12-12121212.

According to the Publication Manual of the American Psychological Association (APA 7th ed., 2020), you would put this information in the following format:

Author, Middle initial. First initial. (Year of publication). Title of article. *Title of the Journal, volume*(issue), page-page. DOI or URL

The APA reference entry would then look like this:

Turner, P. (2009). Writing in an online environment. *Journal of Online Writing, 2*(3), 17-34. https://doi.org/12.1212/12-12121212

You do not need to memorize documentation formats. The key is to use your style guide or a resource such as the [Common Citations and References in APA Format](#) and match your sources with the rules in the guide.

Rules for Documentation

At Purdue Global, APA is the most used documentation style, so you will find many helpful resources on APA Style on the Writing Center's public-facing [Citation and Reference Guides](#) page and on the [Using Sources](#) page in Purdue Global Campus. Additionally, APA's own tool, [Academic Writer](#), is available to students for free in the Purdue Global Library.

APA and other style guides also have official manuals as well as websites where you will find accurate information about how to cite.

Online Resources for Various Style Guidelines

- AP (Associated Press): http://www.apstylebook.com
- APA (American Psychological Association): http://www.apastyle.org
- AMA (American Medical Association): http://www.amamanualofstyle.com
- Bluebook: https://www.legalbluebook.com/
- Chicago Manual: http://www.chicagomanualofstyle.org/home.html
- Government: http://www.gpo.gov
- IEEE (Institute of Electrical and Electronics Engineers): http://www.ieee.org/portal/site
- Oxford: http://www.oup.com

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https://catalog.purdueglobal.edu/policy-information/student-information-

services/conduct/#text