



UNIVERSIDADE  
PORTUCALENSE

## **Norms for Formatting Bachelor's degree Works, Master's Project works, Reports, and Theses, and Doctoral Dissertations**

RE.GE.011.3

Upon consultation of the Scientific Council on July 22, 2020  
Reviewed and approved by the Rector on September 28, 2020

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## 1. INTRODUCTION

This document and its appendices set the norms to be followed for the preparation and formatting of written work, in the 1st, 2nd, and 3rd cycles of studies of Universidade Portucalense. It thus summarizes a set of general methodological and technical rules to be adopted when carrying out academic work, pursuant to Decree-Law No. 115/2013, of August 7:

- Bachelor's degree Works
- Master's Project Work, Final Reports, and Theses
- Doctoral Dissertations

In this way, it seeks to guide and ensure the standardisation of general criteria concerning the internal structure and formatting of works. However, this document does not present an exhaustive set of guidelines, leaving room for the departments to define specific aspects related to the formatting, style or procedures not regulated by this document.

This manual is divided into five parts:

- Formal structure
- General formatting
- Citations and notes
- References
- Archive and dissemination

## 2. FORMAL STRUCTURE

The structure of an academic work comprises a set of pre-textual elements, textual elements, and post-textual elements, which are mentioned below in the order in which they should appear in the work.

### 2.1 Pre-textual component

Elements placed before the body text:

- Cover, spine, and back cover – These should have a white background, dimension A4, and comply with the previously defined template. In order to facilitate cover design, a cover and title page template for each Department is available in the reserved area of the UPT website, in the area related to Graphic Identity, allowing direct editing/alteration of the body text. Other useful elements are also available in this area, such as the logos

of the various departments.

- Free end paper – Blank page.
- Title page – All works should have a title page according to the template available on the UPT's intranet.
- Dedication (optional) – In its own page, usually aligned to the right and centred vertically on the page.
- Author's acknowledgments (optional) – In their own page, following the format of the body text, and mentioning the financial support (when applicable).
- Epigraph (optional) – In its own page, after the acknowledgments, aligned to the right and centred horizontally on the page.
- Resumo – Written in Portuguese; it should include the title and keywords.
  - a. The *resumo* should not exceed 100 words in the case of Bachelor's degree works, one page (around 200 words) in the case of Master's theses, or two pages (about 400 words) in the case of Doctoral dissertations<sup>1</sup>.
  - b. The *resumo* should briefly mention:
    - The theme
    - The aims of the work
    - The methodology adopted
    - The results obtained
    - The main contributions
  - c. Keywords should appear in order of importance, from the most general to the most specific, separated by semicolons (;), up to a maximum of five.
  - d. Between the *resumo* and the keywords there should be a line of spacing.
- Abstract – Abstract written in English, with the title and respective keywords in English. The Abstract should follow the same formatting rules as the *Resumo*.
- Table of Contents – A table with the formal structure of the work, indicating the chapters, sections, and sub-sections, as well as their page numbers. The elements preceding the Table of Contents should not be mentioned.
- Lists of abbreviations and acronyms (if applicable):
  - Acronyms: sequences of letters used instead of whole words, alphabetically;
  - Abbreviations: reduced forms of words, alphabetically.

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<sup>1</sup> Whenever the dissertation or thesis is written in a foreign language, with the express authorization of the Scientific Council, it is mandatory to include the title and a version of the abstract in Portuguese

- Index of figures, symbols, illustrations, tables, etc. (if applicable).

## 2.2 Textual component

The body of the work should be organised into chapters, sections, and sub-sections, numbered sequentially. Each chapter should start on an odd page.

- Introduction – The first chapter should consist of an Introduction comprising:
  - An indication of the theme and its rationale in terms of relevance
  - The aims of the work
  - The methodology adopted
  - The work's general structure
- Body – This is the most important part of the work, materially summarizing the project, research, or study. It is composed of several chapters, namely:
  - Theoretical framework
  - Methodology
  - Analysis of results
- Conclusion – The last chapter consists of a Conclusion. Beyond the work's main contributions – namely for theory and practice, – it should include a reference to research limitations as well as hints for future research.

## 2.3 Post-textual component

The elements to be placed after the body text are:

- References – A list of all the works mentioned in the body, according to the norms set by each department. It should always be in alphabetical order of author surname or, in its absence, of title of the work or document (see number 5).
- Indexes of names, subjects, geographical, remissive, etc. (optional) – When applicable, these should be placed after the References.
- Appendices (optional) – Materials, produced by the author or otherwise, which, while it would not make sense to include in the body of the work, complement the information needed for understanding and evaluation of the work (e.g. questionnaires, interview scripts, data tables, legal diplomas and regulations).

### 3. GENERAL FORMATTING

- Printed copies – The body text can be printed on the front of each sheet only, or on the front and back.
- Font type, colour, and size – The font type Arial is recommended; the colour must be black and the size must be 11 points in the body text and 8 in footnotes.
- Headings – It is recommended to use the same font type as in the body text:
  - Level 1 Headings – bold style, upper case, size 18, spacing 18 points before and 6 after;
  - Level 2 Headings – bold style, size 16, spacing 12 points before and 6 after;
  - Level 3 Headings – bold style, size 14, spacing 6 points before and 6 after.
- Alignment – the text should be aligned to the left and right (justified).
- Margins and spaces:
  - Spacing between lines in the body text should be exactly 18 points;
  - Spacing between lines in footnotes, long quotations, *Resumo*, and Abstract should be single;
  - Paragraphs should be indented at 1 cm;
  - The following margins should be used: top - 3 cm; bottom - 3 cm; left - 3.5 cm; right - 2.5 cm;
  - The header should be 1.25 cm and the footer should also be 1.25 cm.
- Page numbering:
  - The cover and title page should not be numbered;
  - All other pages should be numbered according to the following guidelines:
    - The number appears in the footer, centred, in the same font type as the body text, size 9;
    - All pages following the title page and preceding the Introduction should be numbered consecutively using lower case Roman numerals (i, ii, iii, iv...);
    - All pages after the Introduction should be numbered consecutively using Arabic numerals.
- Illustrations:
  - All illustrations should be numbered, separated according to their type (charts, photographs, graphs, tables, etc.) and duly captioned, with title and source. The title precedes the figure, graph, etc.; the source and notes are underneath.

- Illustrations must be numbered sequentially throughout the text or sequentially within each chapter (for example, Figure X.1, where X is the chapter number).

## 4. CITATIONS AND NOTES

- Citations – Citations should be presented according to the norms recommended by each Department (see Appendices 2 and 3):
  - The following methods are recommended, according to the scientific area:
    - Author-date citation system (author surname, year);
    - Footnote citation system.
  - Direct quotations (i.e., direct transcription of the author's words):
    - Quotations up to three lines long should appear in quotation marks, in the body text. In this case, the citation must be author-date-page(s) (author surname, year, p. X);
    - Quotations longer than three lines should be detached from the text, in a single paragraph, in a smaller font size, justified, and with a 1 cm indentation in relation to the body text, and single-spaced. Quotation marks must not be used and, as in the previous case, the citation should be author-date-page(s) (author surname, year, p. X).
- Footnotes – Explanatory footnotes are used to give bibliographical indications, clarify sources, justify something controversial, and also to clarify notions, ideas and passages, define concepts, make translations, make comments, or refer to other works.
- Footnote citation – For the footnote citation system, applied in the Law Department, the use of abbreviations of Latin expressions is allowed, and they should be used in italics.

## 5. REFERENCES

After the last chapter, the full list of authors and works effectively referenced throughout the body work should be included, under the heading References, regardless of the source consulted and its format (printed or digital), in alphabetical order of authors surnames or of titles, if there is no author (see paragraph 2.3).

With regard to the Law Department, bibliographic references regarding legislation and jurisprudence should be included in a subsection, entitled Legislation and Jurisprudence.

The standards used, which should be recognized by the national and international scientific community, are those recommended by each Department, according to the scientific area in which the work is included.

- APA Standard (Appendix 2);
- ISO Standard 690 (Appendix 3).

Consistency is recommended in the preparation of bibliographical references. Once a referencing system is adopted, it should be used consistently throughout the work.

## 6. ARCHIVE AND DISSEMINATION

Master's Project works, Reports, and Theses, as well as Doctoral dissertations, are subject to mandatory deposit in the Institutional Repository, part of the network of the Open Access Scientific Repository of Portugal (Repositório Científico de Acesso Aberto de Portugal - RCAAP), in accordance with Ordinance No. 285/2015, published in Diário da República, 1ª série, nº 180 de 15 de setembro (Official Gazette Series I, No. 180, of September 15). The objective of such deposit is the preservation and dissemination, in open access, of scientific works.

Therefore, Master's Project works, Reports, and Theses, and Doctoral Dissertations should be delivered, in addition to the printed format in the case of the latter<sup>2</sup>, in digital format, preferably in a PDF/A file<sup>3</sup>, reproducing the printed edition, and their content should be clearly legible in all the copies produced.

The availability of these works for archiving and access in the Institutional Repository, through the General Library of Universidade Portucalense, should be authorized by the author, with the document Declaration of Authorization of Deposit in the Institutional Repository (Appendix 1), upon delivery of the final version in the Academic Office, checking the conditions for access:

- Free, universal, and immediate;
- Restricted;
- Embargoed for a period of one to three years.

### 6.1. Printed version

The printed version should obey the following guidelines:

- Binding in cardstock having a grammage of at least 200 grams.
- White A4, good quality paper (minimum 80 grams), and of the same type for all the work.

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<sup>2</sup> According to Decree-Law No. 65/2018 of August 16, the delivery of Master's theses, project works, reports, or works that replace them, is done exclusively in digital format.

<sup>3</sup> Order No. 14167/2015, of December 1, approves the list of formats authorized for the purpose of deposit in the RCAAP of said documents.



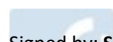
## 6.2. Digital version

The digital version should obey the following guidelines:

- It should consist of a single file (for works of up to 20 MB), or a limited number of files (for works larger than 20 MB).
- The files should be in a PDF/A format, not protected with a password, and not encrypted. The PDF must be made readable and accessible from any computer.
- Image, audio or multimedia files may also be included, preferably in standardized and non-proprietary formats.

Porto, September 28, 2020

Sebastião Feyo de Azevedo,  
Rector



Signed by: **SEBASTIÃO JOSÉ CABRAL FEYO DE AZEVEDO**  
Identification Number: BI019231210  
Date: 2020.09. 28 11:10:59 +01'00'



**CARTÃO DE CIDADÃO**

## APPENDIX 1

### Declaration of Authorization of Deposit in the Institutional Repository

Name: \_\_\_\_\_

Phone / Cell Phone: \_\_\_\_\_ Id.Card /CC number: \_\_\_\_\_

Email address: \_\_\_\_\_

Master's degree in: \_\_\_\_\_

Doctorate degree: \_\_\_\_\_

Thesis / Project Work / Internship Report / Dissertation Title (Strike out what does not apply): \_\_\_\_\_

\_\_\_\_\_

Supervisor(s): \_\_\_\_\_

\_\_\_\_\_

For all due intents and purposes, I hereby declare that I grant Universidade Portucalense Infante D. Henrique, free of charge, in addition to the free use of the title and abstract provided by me, authorization to file and make accessible to interested parties, namely through its Institutional Repository, the above identified work, in accordance with the following status (select only one option):

Immediate availability of the full text for worldwide access.

Full text available after an embargo period of \_\_\_\_\_  1 year  2 years  3 years, after which I authorize its worldwide access.

Availability of bibliographic information only (author, title, and abstract).

I further declare that, by signing this declaration, I am not waiving any ownership of copyright, which belongs to the undersigned of this declaration, nor my right to use the work in future works.

Universidade Portucalense, \_\_\_\_\_ 20 \_\_\_\_\_

Signature: \_\_\_\_\_

## APPENDIX 2

### Guidelines for citations and bibliographical references

#### APA Standards<sup>4</sup>

#### SUMMARY

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<sup>4</sup> Appendix 2 to the Norms for Formatting Bachelor’s degree Works, Master’s Project works, Reports, and Theses, and Doctoral Dissertations - Universidade Portucalense’s internal document, prepared by UPT’s General Library, to support the academic community in formatting and producing citations and bibliographic references.

## Introduction

This manual is based on the *Publication Manual of the American Psychological Association*, 7th edition, and provides a set of general guidelines for making in-text citations and bibliographic references. The APA standard is an author-date citation system used in the area of Social and Human Sciences, and it has been widely applied in multiple scientific domains in Portugal.

Regardless of the style of bibliographic reference to be used, it is important to:

- Check if there is any type of citation style preferred by the supervisor of the work, or expressly indicated by the University or Department, or, in other cases, adopted by the scientific journal where the work will be published or by the scientific committee of the seminar/conference where the work will be presented;
- Provide the most complete information possible for each bibliographic reference, so that any reader can identify, without a doubt, the work cited;
- Prepare the citations and the list of bibliographic references consistently, respecting throughout the document the options taken regarding the style to be applied, or adaptation thereof, in order to create uniformity and clarity in the document's structure.

For more detailed information, go to:

- General Library of Universidade Portucalense
- <http://www.apastyle.org/>
- <http://blog.apastyle.org/>
- <http://owl.english.purdue.edu/owl/resource/560/1/>

## 1. General guidelines

This style follows the author-date method: author surname, followed by the year of publication. Authors cited in the text must appear in the references with full information. The examples presented in this manual consider the translation or adaptation into Portuguese of the terms used in the creation of in-text citations and bibliographic references, and some examples of translation and adaptation into Portuguese are shown, namely:

- ✓ and = e
- ✓ Master's thesis = Dissertação de mestrado
- ✓ Doctoral dissertation = Tese de doutoramento

Fundamental rules in the use of some of the elements needed to create citations and bibliographic references according to the APA standard are addressed:

- ✓ Author;
- ✓ Title;
- ✓ Edition;
- ✓ Date of publication;
- ✓ Numbering and pagination;
- ✓ Electronic documents.

## 2. Bibliographic references

Bibliographic references give the details of the publication in order to allow an unequivocal identification of the documents. Each reference includes the information required by the bibliographic style in use, allowing the reader to identify and locate the document consulted.

The elements that make up each of the bibliographic references depend on specific rules, according to how they appear in the source, to the type of document, and to its format (printed or digital).

### 2.1. Rules for the list of bibliographic references

#### 2.1.1. General rules

- a. The list of bibliographic sources, titled **Bibliography or Bibliographic References**, should be paged as a continuation of the text of the work itself;
- b. Start the first line of each reference near the left **margin** of the page, and advance 3 spaces in the following lines;
- c. **The space between lines** should be reduced in relation to the rest of the work;
- d. Arrange the list in **alphabetical order of the first author surname**.
- e. When referencing **more than one work by the same author**:
  - ✓ list in order of publication date, starting with the oldest and ending with the most recent, repeating the author's name in each publication
  - ✓ when the year of publication of the works is the same, they must be listed in the bibliography in alphabetical order of the title, adding a lower case letter to the year, to prevent any type of confusion, and the same methodology must be used when citing in the text. Example: (Alves, 1984a), (Alves, 1984b);
  - ✓ author cited both for a work with a single author and also for works with more than one author, as main author, first give the references for the works with a single author and then for those with more than one author.

#### 2.1.2. Author

Person or entity responsible for the intellectual and / or artistic content of a document.

##### **Author = person**

- a. the person's name is given in inverted form (surname, initials of name) and the name of entities is indicated in direct form:  
Example: Moreira, V (private individual author)  
Portuguese Bar Association (legal person, or entity author)

- b. single author - Author Surname,  
Initials: Example: Brown, E. (2018).
- c. two authors – Author1 Surname, Initials, & Author2 Surname, Initials:  
Example: Fine, M., & Kurdek L. A. (2019).
- d. from three to twenty authors - all the authors must be named in the bibliographic references list, separated by a coma, and the last cited will be preceded by **&**:  
Example: Nguyen, T., Carnevale, J. J., Scholer, A. A., Miele, D. B., & Fujita, K. (2019).
- e. more than twenty authors – include the first nineteen authors, then insert an ellipsis and then add the name of the final author. There should be no more than twenty authors in the reference:  
Example: Pegion, K., Kirtman, B. P., Becker, E., Collins, D. C., LaJoie, E., Burgman, R., Bell, R., DelSole, R., Min, D., Zhu, Y., Li, W., Sinsky, E., Guan, H., Gottschalck, J., Metzger, E. J., Barton, N. P., Achuthavarier, D., Marshak, J., Koster, R., . . . Kim, H. (2019).

#### **Author = Editor**

- a. When authorship is in the form of a literary editor, compiler, organizer, etc., such function must be mentioned after the name, in parentheses:  
Example: Surname, Initials of name (Ed. or Eds.).  
Barros, M. (Ed.); Carvalho, V. (Org.).

#### **Author = Entity**

- a. Name of group / entity / institution / organization

#### **Unknown author**

- a. When the author is unknown, the title is the first element, followed by the date and a full stop;
- b. In cases where the document explicitly mentions anonymous / unknown author, this mention is included in the list of bibliographic references in the correct position, in the alphabetical order of the list:  
Example: Anonymous (1734).

#### 2.1.3. Title

- a. Books, book chapters, reports, and articles:
  - ✓ Capitalize only the first letter of the title and subtitle;
- b. Periodicals titles – magazines, journals, newspapers:
  - ✓ Capitalize and italicize words;
- c. For book titles:
  - ✓ Place the **title** of the book in italics or of the article in cursive (in the case of articles, papers in conference proceedings, or book chapters, italics are used in the title of the source publication) immediately **after the year of publication**;

- ✓ **capitalize** only the first letter of the title, the first letter of the subtitle, when it exists, as well as proper names. Use *italics* for the entire title of the book.

d. For periodicals titles:

- ✓ Place the **name of the periodical publication** after the title of the article, use *italics* for the entire title, and **capitalize** each word of the title (except, of course, prepositions, contraction of prepositions, and articles).
- ✓ for **articles in periodicals or in edited volumes**, **capitalize** only the first letter of the title, the first letter of the subtitle, when it exists, as well as proper names. In this case, **the title of the article is written in normal font**, not italics. Use a full stop after the title of the article.

#### 2.1.4. Edition

- a. Any **edition** other than the first should be mentioned in parentheses, right after the title of the book.

#### 2.1.5. Date of publication

- b. Place the **date of publication in parentheses** immediately after the name (s) of the author(s). Place a **full stop** after closing the parentheses.
- c. When the work does not mention the **date of publication**, use the abbreviation n.d., which means *no date*:
  - a. Example: (n.d.).

#### 2.1.6. Pagination and numbering

- a. Pages in the references list should be given in the following ways: 'p.' for a single page and 'pp.' for more than two pages.  
Example: pp. 30-43 / p. 10
- b. When referencing periodicals, give the number of the volume in **Arabic numbering** and in italics, followed by the number of publication, in parentheses, and then give the page numbers, with the limits separated by an hyphen  
Example: *34*(1), pp. 120-128 / Example: 28, pp.30-43

#### 2.1.7. URL or DOI

- a. If the document has a DOI, prefer this over the URL, used in the following ways:
  - ✓ <https://doi.org/xxx>
  - ✓ <http://xxxx>
- b. Standards advise the mention of the DOI (whenever available) even when the printed version

of the document is being used.

- c. The APA Manual provides for the possibility of breaking electronic addresses – URLs – after a full stop or a dash.

## 2.2. Order of elements

The elements that make up each of the bibliographic references vary according to the type of document and its format (printed or digital).

This handbook covers the following types of documents:

- ✓ Journal article
- ✓ Book
- ✓ Book chapter
- ✓ Conference paper
- ✓ Master’s thesis & Doctoral dissertation
- ✓ Report
- ✓ Websites and parts of websites
- ✓ Blog post

For each type in the following tables, the elements that make up the bibliographic reference are presented in their respective order, as well as any observations and examples, with all types of documents subdivided within the formats: printed documents or digital documents.

### 2.2.1. Printed documents

Monographs (books)
Author (year). <i>Title: subtitle.</i> (Edition). Publisher.
<ul style="list-style-type: none"> <li>✓ Ashwin, P. (2006). <i>Changing higher education: The development of learning and teaching.</i> Routledge.</li> <li>✓ Stoneman, R. (2008). <i>Alexander the Great: A life in legend.</i> Yale University Press.</li> <li>✓ Cantor, C.R., &amp; Smith, C.L. (1999). <i>Genomics: The science and technology behind the Human Genome Project</i> (2nd ed.). John Wiley &amp; Sons.</li> <li>✓ Barbeiro, L. (Coord.). (2007). <i>Comunicação de Ciência.</i> Sete Pés.</li> <li>✓ Leitch, M. G., &amp; Rushton, C. J. (Eds.). (2019). <i>A new companion to Malory.</i> D. S. Brewer.</li> </ul>



Book chapter
<p>Chapter Author (year). Title: subtitle. In main doc. Main author<sup>5</sup> <i>Title: subtitle</i> (Edition, chapter page number(s)). Publisher.</p>
<ul style="list-style-type: none"> <li>✓ Reilly, P.R. (1997). Laws to regulate the use of genetic information. In M. A. Rothstein (Ed.), <i>Genetic secrets: Protecting privacy and confidentiality in the genetic era</i> (pp. 369-391). Yale University Press.</li> <li>✓ Napolitano, J. (2013). Development, sustainability and international politics. In L. Meuleman (Ed.), <i>Transgovernance: Advancing sustainability governance</i> (pp. 163–211). Springer.</li> <li>✓ Armstrong, D. (2019). Malory and character. In M. G. Leitch, &amp; C. J. Rushton (Eds.), <i>A new companion to Malory</i> (2nd ed., pp. 144-163). D. S. Brewer.</li> </ul>

Journal article
<p>Article author (year). Article Title: subtitle. <i>Journal Title: subtitle, volume</i>(number), pages.</p>
<ul style="list-style-type: none"> <li>✓ Goldfried, M. R. (2013). What should we expect from psychotherapy? <i>Clinical Psychology Review</i>, 33(5), 654–662.</li> <li>✓ George, A. L. Jr., &amp; Neilson, E. G. (2000). <i>Genetics of Kidney Disease. American Journal of Kidney Diseases</i>, 35(4), 160-169.</li> <li>✓ Scruton, R. (1996). The eclipse of listening. <i>The New Criterion</i>, 15(3), 5–13.</li> </ul>

Article in the press
<p>Article author (year, month day). Article Title: subtitle. <i>Title: subtitle, volume</i>(number), pages.</p>
<ul style="list-style-type: none"> <li>✓ Peterzell, J. (1990, April). Better late than never. <i>Time</i>, 135(17), 20–21.</li> </ul>

Conference paper <sup>6</sup>
<p>Author (year). Paper Title: subtitle. In <i>Publication title / proceedings</i> (page numbers in document). Publisher.</p>
<ul style="list-style-type: none"> <li>✓ Alvim, L. &amp; Nunes, M. B. (2010). As Bibliotecas 2.0 são redes de comunicação? Contributo para o estudo sobre a utilização das tecnologias da Web 2.0 nas estratégias de comunicação nas bibliotecas públicas e académicas portuguesas. In <i>Políticas de Informação na sociedade em rede: actas do 10.º Congresso da Associação Portuguesa de Bibliotecários, Arquivistas e Documentalistas, Guimarães</i> (pp. 72-95). BAD.</li> </ul>

Master’s thesis e doctoral dissertation
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<sup>5</sup> Do not invert the main document’s author’s name.

<sup>6</sup> For papers published in a book, follow the same rules as for books. For regularly published papers, follow the rules applied to periodicals.

<p>Author (year). <i>Title: subtitle</i> (Additional information). Institution name.</p>
<ul style="list-style-type: none"> <li>✓ Alves, T. M. G. (2013). <i>Alterações climáticas: Cenários socioeconómicos para a Ria de Aveiro</i> (Master's thesis). Universidade de Aveiro.</li> <li>✓ Horta-Monteiro, M.C.S.M. (1994). <i>Utilização de Água Residual Urbana na Cultura de Azevém (<i>Lolium multiflorum</i> Lam.)</i> (Master's thesis). Instituto Superior de Agronomia, Universidade Técnica de Lisboa.</li> <li>✓ Tingle, C.C.D. (1985). <i>Biological control of the glasshouse mealybug using parasitic hymenoptera</i> (Doctoral dissertation). University of London.</li> </ul>

Report
<p>Author (year). <i>Título: subtítulo</i> (ReportNo. xxx). Publisher.</p>
<ul style="list-style-type: none"> <li>✓ Burton, N. W., Welsh, C., Kostin, I., &amp; VanEssen, T. (2009). <i>Toward a definition of verbal reasoning in higher education: Research report</i> (Report No. ETS RR-09-33). Educational Testing Service.</li> </ul>

### 2.2.2 Digital format documents

Electronic book
<p>Author (year). <i>Title: subtitle</i>. URL</p>
<ul style="list-style-type: none"> <li>✓ Ashwin, P. (2006). <i>Changing higher education: The development of learning and teaching</i>. <a href="http://books.google.pt/books?id=ZsVtbqmbHusC">http://books.google.pt/books?id=ZsVtbqmbHusC</a></li> <li>✓ Ashwin, P. (2006). <i>Changing higher education: The development of learning and teaching</i>. <a href="http://books.google.pt/books?id=ZsVtbqmbHusC">http://books.google.pt/books?id=ZsVtbqmbHusC</a></li> <li>✓ Bryant, P. (2014). <i>Biodiversity and Conservation</i>. <a href="http://darwin.bio.uci.edu/~sustain/bio65/Titlepage.htm">http://darwin.bio.uci.edu/~sustain/bio65/Titlepage.htm</a>.</li> <li>✓ Conoloff, A. (2012). <i>Salvaging the suburbs</i>. <a href="https://doi.org/11.8870/6001/2122.442.261">https://doi.org/11.8870/6001/2122.442.261</a></li> </ul>

Electronic book chapter
<p>Author (year). Chapter Title: subtitle. In Author, <i>Main title: subtitle</i> (part page numbers). URL</p>
<ul style="list-style-type: none"> <li>✓ Napolitano, J. (2013). Development, sustainability and international politics. In L. Meuleman (Ed.), <i>Transgovernance: Advancing sustainability governance</i> (pp. 163–211). <a href="https://doi.org/10.1007/978-3-642-28009-2_4">https://doi.org/10.1007/978-3-642-28009-2_4</a></li> </ul>

Electronic journal article
<p>Article author (year). Article Title: subtitle. <i>Journal Title: subtitle, volume(number), pages</i>. URL</p>

<ul style="list-style-type: none"> <li>✓ Fine, M., &amp; Kurdek, L. A. (1993). Reflections on determining authorship credit and authorship order on faculty-student collaborations. <i>American Psychologist</i>, 48, 1141-1147. <a href="http://www.apa.org/journals/amp/kurdek.html">http://www.apa.org/journals/amp/kurdek.html</a></li> <li>✓ Adler, J. (1999). Ghost of Everest. <i>Newsweek</i>. <a href="http://newsweek.com/nw-srv/issue/20_99a/printed/int/socu/so0120_1.htm">http://newsweek.com/nw-srv/issue/20_99a/printed/int/socu/so0120_1.htm</a></li> <li>✓ Brownlie, D. (2007). Toward effective poster presentations: An annotated bibliography. <i>European Journal of Marketing</i>, 41, 1245-1283. <a href="https://doi.org/10.1108/03090560710821161">https://doi.org/10.1108/03090560710821161</a></li> <li>✓ Baniya, S., &amp; Weech, S. (2019). Data and experience design: Negotiating community-oriented digital research with service-learning. <i>Purdue Journal of Service-Learning and International Engagement</i>, 6(1), 11-16. <a href="https://doi.org/10.5703/1288284316979">https://doi.org/10.5703/1288284316979</a></li> </ul>
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Article in the press
Article author (year, month day). Article Title: subtitle. <i>Magazine Title: subtitle</i> . URL
<ul style="list-style-type: none"> <li>✓ Richards, C. (2019, December 9). Best music of 2019: Lana Del Rey sings lullabies about the end of America. <i>Washington Post</i>. <a href="https://www.washingtonpost.com/xxx.html">https://www.washingtonpost.com/xxx.html</a></li> </ul>

Conference paper (published in book form) <sup>7</sup>
Author (year). Paper Title: subtitle. In Author, <i>Title of publication/proceedings</i> (page numbers in document). URL
<ul style="list-style-type: none"> <li>✓ Cretu, R. Z., &amp; Negovan, V. (2012). Does providing personalized feedback in psychology teaching and learning differentiates students' academic performance? In M. Anitei, M. Chraif, &amp; C. Vasile (Eds.), <i>Procedia - Social and Behavioral Sciences</i> (pp. 652-656). <a href="https://doi.org/10.1016/j.sbspro.2012.01.202">https://doi.org/10.1016/j.sbspro.2012.01.202</a></li> </ul>

Conference paper (regularly published online)
Author (year). Paper Title: subtitle. <i>Publication title</i> , numbering, pagination in document. URL
<ul style="list-style-type: none"> <li>✓ Herculano-Houzel, S., Collins, C. E., Wong, R, Kaas, J. H., &amp; Lent R. (2008). The basic nonuniformity of the cerebral cortex. <i>Proceedings of the National Academy of Sciences</i> 105, 12593-12598. <a href="https://doi.org/10.1073/pnas.Q805417105">https://doi.org/10.1073/pnas.Q805417105</a></li> </ul>

Electronic master's thesis and doctoral dissertation
Author (date). <i>Title: subtitle</i> (Additional note, Institution). Database. URL
<ul style="list-style-type: none"> <li>✓ Alves, T. M. G. (2013). <i>Alterações climáticas: Cenários socioeconómicos para a Ria de Aveiro</i> (Master's thesis, Universidade de Aveiro). Repositório Institucional da Universidade de Aveiro. <a href="http://ria.ua.pt/handle/10773/12141">http://ria.ua.pt/handle/10773/12141</a>.</li> </ul>

<sup>7</sup> Note: for papers published in a book, follow the same rules as for books. For regularly published papers, follow the rules applied to periodicals

✓ Monteiro, A. J. (2012). *A Biblioteca 2.0 como mecanismo facilitador do ensino do português*. (Master's thesis, Universidade Portucalense). Repositório Institucional da Universidade Portucalense. <http://repositorio.uportu.pt/dspace/>

Reports

Author (year). *Título: subtítulo* (ReportNo. xxx). URL

✓ Larat, E., Delrot, P., Avotins, A., & Alves, L. N. (2014). *D8.1. Report on overall sites infrastructure preparation* (Report No. LITES CIP-ICT-PSP 238916). <http://ria.ua.pt/handle/10773/11866>

Website or information extracted from a website, portal or blog<sup>8</sup>

Author (year, month, day). *Title: subtitle*. Website/blog Title. URL

✓ Holinger, P. C. (2014, October 24). *Great kids, great parents: Infant/child development and the importance of children's feelings*. Psychology Today. <http://www.psychologytoday.com/blog/great-kidsgreat-parents/201410/interferences-interest-in-the-talking-child>

✓ American Society for the Prevention of Cruelty to Animals. (2019, November 21). *Justice served: Case closed for over 40 dogfighting victims*. <https://www.asPCA.org/news/justice-served-case-closed-over-40-dogfighting-victims>

✓ Axelrod, A. (2019, August 11). A century later: The Treaty of Versailles and its rejection of racial equality. *Code Switch, NPR*. <https://www.npr.org/sections/codeswitch/2019/08/11/742293305/a-century-later-the-treaty-of-versailles-and-its-rejection-of-racial-equality>

✓ *Quantum mechanics*. (2019, November 19). Wikipedia. Retrieved November 25, 2019, from [https://en.wikipedia.org/wiki/Quantum\\_mechanics](https://en.wikipedia.org/wiki/Quantum_mechanics)<sup>9</sup>

### 3. In-text citations

An in-text citation is an abbreviated way of referring in the text to the content of another author and must contain all the necessary information to allow an unequivocal correspondence between itself and the corresponding bibliographic references at the end of the document.

There are three types of in-text citations:

1. direct quotation – literal transcription of the author's text;
  - ✓ short
  - ✓ long
2. indirect citation - conveying the idea in your own words;
3. citation of a citation - when you do not have access to the original text.

#### 3.1. Indirect citation

The reproduction of other authors' idea in your own words and different from theirs is called an indirect citation.

The rewriting of an author's idea in our own words is the type of in-text citation that is used most often throughout a document.

After reading and analysing a document, the transmission of the knowledge of that document's author in the text you are writing must always be accompanied by due credits to the author of the document

<sup>8</sup> If the author is a group/entity, use as author. If the author's name and the website name are the same, omit the website name from the reference.

<sup>9</sup> If there is no author, use the title and include the retrieval date only if the content is likely to be updated.

consulted.

According to APA standards, the transmission of the knowledge of the authors of documents you read must always be accompanied by a citation thereof, i.e., an in-text mention of the Author's Surname, Year of publication, and location (pages).

To correctly apply the general in-text citation rules, please read the next points of this manual.

### 3.2. Direct quotation

The inclusion of the literal transcription of the text of the author of the document read is called a direct quotation. According to the APA, in these cases, depending on the length of the transcribed text, the following rules apply:

#### a. Short quotations

- ✓ A short direct quotation is the literal transcription of the text of the consulted document not exceeding 40 words;
- ✓ The transcription is inserted in the text itself, with quotation marks;
- ✓ It must include the indication of the page (p.) or of the pages interval (pp.).

1. (...) "librarians must be willing to expose themselves to the discomfort of advocacy, argument, criticism, and real change to be in the forefront of this movement" (OgBurn, 2009, p.41).
2. (...) as OgBurn (2009) mentions, when analysing this matter: "librarians must be willing to expose themselves to the discomfort of advocacy, argument, criticism, and real change to be in the forefront of this movement" (p.41).

#### b. Long quotations

- ✓ A long direct quotation is the literal transcription of the text of the consulted document which exceeds 40 words;
- ✓ No quotation marks, no italics;
- ✓ The transcription is detached from the text, with left margin indent (c. 1.25 cm) for all the lines, and with double line spacing;
- ✓ It must include the indication of the page (p.) or of the page interval (pp.).

1. The personalization of services linked to magazine hosting is a widely used solution. They are focusing on the capabilities and possibilities of new models rather than slavishly duplicating or simply automating traditional models. Aware there are core services underpinning both traditional and new model publishing activities, publishing programs are concentrating on defining that minimum set and learning what is required to support it. At the same time, they seek to identify the most promising new kinds of services needed to support authors and editors. (Hahn, 2008, p. 16)

2. According to Vieira (2002):  
O estudo do comportamento do consumidor é definido como a investigação das atividades diretamente envolvidas em obter, consumir e dispor de produtos e serviços, incluindo os processos decisórios que antecedem e sucedem estas ações. Na verdade, é o estudo do processo vivido pelos indivíduos ao tomarem decisões de empregar seus recursos disponíveis em itens relacionados ao consumo, fazendo assim uma vinculação com os propósitos dos profissionais de marketing, que buscam identificar as necessidades e induzir o cliente a consumir o produto. (p. 219)

3.3. Citation of works not read by the author

The reference to secondary sources, that is, documents in which the information was only seized through reading other documents, is called a citation of a citation.

During the reading of a document (primary source) the reference to relevant information from other authors leads to the discovery of other documents (secondary sources) that, despite their relevance, are not always possible to read.

The citation of secondary sources, according to APA 6th, follows this rule: Whenever the extract or work cited has not been seen by the author and the citation is made indirectly, through another source (due to the impossibility of consulting the original work), the citations must be preceded of the statement **cited by**. The **work that will appear in the bibliography is the one from which the citation was taken**.

Rule	Example
Indication of the Author or the information you want to highlight from the secondary source (cited by primary source Surname, Year)  Note: In the list of bibliographic references only the primary source reference is included	“Bob Usherhood (1996, cited by Riviére, 2004, p. 50) is one of the authors who defends the impossibility of neutrality in scientific research...”.  Riviére, J. C. (2004). Metodología de la documentación científica. Madrid: Alfabuara.

3.4. Authorship

According to the APA bibliographic style, the in-text citation follows these rules:

- a. The citation system used is author-date, and the elements must appear in this order:
  - ✓ author surname, document’s publication year, and, for direct quotes, the numbers of the quoted pages;
  - ✓ the information is placed in curved parentheses.
- b. When using more than one citation at the same time, each citation is separated by a semicolon, and they are ordered alphabetically, with all citations included in a single curved parenthesis.
- c. In citations that include several works by the same author, the author must be mentioned only once, followed by their works in the following order: no date (n. d.) – year (from oldest to newest) – in press.

1. (Silva, 2010, p. 25)
2. (Craik & Lockhart, 1972; Goldfried, 2013; Pacula et al., 2014)
3. (Smith, n. d., 1995, 2020, in press)

According to APA 7th, norms for citing authors in the text vary depending on:

- ✓ the number of authors of the work cited;
- ✓ the number of times the same work is cited throughout the document. In some cases, the first time it is cited, the author is given in one way whereas in the following times the author of that same citation is given in another way.

Authorship information can appear in the in-text citation with or without parentheses. The following

examples show the rules for giving the authorship in the in-text citation:

Author	1st citation in the text	2nd and following citations	Example
1 author	(Surname, year)	(Surname, year)	(Matos, 2018)
	Surname (year)	Surname (year)	Matos (2018)
2 authors	(Surname1 & Surname2, year)	(Surname1 & Surname2, year)	(Matos & Bastos, 2018)
	Surname1 and Surname2 (year)	Surname1 and Surname2 (year)	Matos and Bastos (2018)
More than 3 authors	(Author1 Surname et al., Publication year)	(Author1 Surname et al., Publication year)	(Matos et al., 2018)
	or	or	
	Author1 Surname et al. (Publication year)	Author1 Surname et al. (Publication year)	Matos et al. (2018)
Note: if two citations have the same abbreviation, the surnames of all authors necessary to distinguish them must be cited.			
Groups as authors (Institutions, organizations, etc.)	(Name of the group or Abbreviation of the name of the group, Year publication)	(Name of the group or Abbreviation of the name of the group, Year of publication)	(Universidade de Aveiro [UA], 2013)
	or Name of the group or Abbreviation of the name of the group (Year publication)	or Name of the group or Abbreviation of the name of the group (Year of publication)	(UA, 2013) (Universidade de Aveiro (UA, 2013) UA (2013)
Note: use abbreviation of name in the case of groups with recognised abbreviation or acronym			

Without author indication	("Title", Year) (Title, Year)	("Title", Year) (Title, Year)	("Study Finds," 2007) (College Bound Senior, 2008)
	or "Title" (Year) Title (Year)	or "Title" (Year) Title (Year)	"Study Finds" (2007) College Bound Senior (2008)
Note: ✓ in the case of documents without author or with an anonymous author, the in-text citation is made with the first words of the reference entry (usually part of the title of the work) and the year; ✓ Quotation marks are used: for article, chapter, or web page titles; ✓ Italics are used: for journal, book, brochure, report titles.			
Unknown author (the document itself mentions unknown author)	(Anonymous, Publication year)	(Anonymous, Publication year)	(Anonymous, 2018)

In citations that can generate ambiguity the following rules are followed:

Author	Rule	Example
Authors with the same surname	Include the initials of the authors with the same surname in all citations of the text, even if the year of publication is different.	(C. Costa, Santos & Ramalho, 2010; P. J. Costa, Heleno & Pinhel, 2010)  or  C. Costa, Santos and Ramalho (2010) and P. J. Costa, Heleno and Pinhel (2010)
Authors with the same surname and initials	Include the name of the authors with the same surname and initials in all citations of the text, even if the year of publication is different.	(Paul Janet, 1876 & Pierre Janet, 1906)  or  Paul Janet (1876) and Pierre Janet (1906)
Two or more works by the same author	(Author surname, Year of document 1, Year of document 2)  or  Author surname (Year of document 1, Year of document 2)	(Henriques & Sandim, 2010, 2011)  or  Henriques and Sandim (2010, 2011)
Two or more works by different authors entered by alphabetical order of the reference	(Author A Surname, Year of Document; Author B Surname, Year of Document)  or  Author A Surname (Year of document) and Author B Surname (Year of Document)	(Sousa, 2010; Vieira, 2002)  or  Sousa (2010) and Vieira (2002)
Documents by the same author with the same date	(Author surname, Year of documenta, Year of documentb)  or	(Alves, 1984a, 1984b)



a letter is added to the year of publication (a, b, c, etc.)	Author surname (Year of document <b>a</b> , Year of document <b>b</b> )	or Alves (1984a, 1984b)
--	---	----------------------------

### 3.5. Other situations

a. Citation of **web document with no page numbers**:

- ✓ it may include the paragraph number  
(Cushman, 2002, para.3).

b. Citation of **document with no author**:

- ✓ the first words of the reference entry are used (usually, part of the title) ("Benefits of Usability Studies," 2002, p. 34).

c. Citation of **personal communications** such as readings, or personal messages of exchanged emails:

- ✓ they must be cited in the text, but not in the final bibliography list.  
(personal communication, May 3, 2000).

d. Avoid ambiguity in citations:

To avoid ambiguity in multiple works with three or more authors with the same year of publication, the number of authors needed to distinguish the publication from another must be cited. Example:

- ✓ Teles, Marques, Júlio, Mello, and Silva (2018) and Teles, Marques, Harcourt, Suny, Ludo, and Tronco (2018) - citations would be Teles et al. (2018);
- ✓ To avoid ambiguity, citation must be done in such a way that the articles are distinguished: Teles, Marques, Júlio, et al. (2018) and Teles, Marques, Harcourt, et al. (2018).

American Psychological Association. (2020). *Publication manual of the American Psychological Association* (7th ed.).

## APPENDIX 3

### Guidelines for citations and bibliographical references

#### ISO Standard 690: 2010<sup>10</sup>

#### SUMMARY

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<sup>10</sup> Appendix 3 to the Norms for Formatting Bachelor's degree Works, Master's Project works, Reports, and Theses, and Doctoral Dissertations - Universidade Portucalense's internal document, prepared by UPT's General Library, to support the academic community in formatting and producing citations and bibliographic references.

## Introduction

The ISO 690:2010 standard, *Information and documentation: guidelines for bibliographic references and citations to information resources*, third edition, developed by the International Organization for Standardization (ISO), provides guidelines for the creation of citations and bibliographic references. It sets the order of the elements in bibliographic references, as well as the conventions for transcribing and presenting the information from several sources of information.

This manual is based on the international standards ISO 690: 2010, which repealed and replaced the previous standards, ISO 690: 1987 and ISO: 690-2. 1997.

For more detailed information, go to the General Library of Universidade Portucalense.

### 1. General guidelines

In-text citations and the list of bibliographic references must be consistent, respecting throughout the document the options taken regarding the style to be applied, or adaptation thereof, in order to create uniformity and clarity in the document's structure.

The information included in a reference must give the details of the publication in order to allow an unequivocal identification of the document consulted. A reference must include detailed information, provided by the standard used.

The examples presented in this manual consider the translation and adaptation into Portuguese of the terms used in the creation of in-text citations and bibliographic references.

### 2. Specific guidelines

The elements that make up each of the bibliographic references depend on specific rules, according to how they appear in the source, the type of document and its format (printed or digital), and should be taken, when possible, from the resource cited. Data taken from a source external to the resources is placed between [...].

Next, the fundamental rules in the use of some of the elements needed for the creation of citations and bibliographic references according to the ISO 690:2010 standard are addressed, namely:

- ✓ Author;
- ✓ Title;
- ✓ Edition;
- ✓ Place of publication;
- ✓ Publisher;
- ✓ Date of publication;
- ✓ Numbering and pagination;
- ✓ Identifiers (ISBN, ISSN, DOI);
- ✓ Type of support;
- ✓ Update date;
- ✓ Date of retrieval;
- ✓ Availability and access.

## 2.1. Author

Person or entity responsible for the intellectual and / or artistic content of a document.

### Author = person

- a. The person's name is given in inverted form (SURNAME, Names) and the name of entities is given in direct form:

MOREIRA, Vital (private individual author)

PORTUGUESE BAR ASSOCIATION (legal person or entity author)

- b. The name of the author must be given in the same form as it appears in the source;
- c. When the author has more than one surname, the entry is always by the last surname, except for authors of Spanish language (Spaniards or Latin-American):

MERLO VEGA, José Antonio (private individual author with a Spanish language name)

- d. If the publication has two or three authors, they are given in the order in which they appear in the document:

CANOTILHO, J. J. Gomes, FERREIRA, Luís and NEGRÃO, Fernando

- e. The name of the first author should be in inverted form, the remaining authors can be in direct order, with the surname capitalised:

CANOTILHO, J. J. Gomes, Luís FERREIRA and Fernando NEGRÃO

- f. If the publication has more than three authors, it is possible to mention only the name of the first author, followed by "et al." (et alli, Latin expression meaning "and others"), provided that the abbreviated form does not lead to a wrong correspondence between the citation and the list of bibliographic references:

MOREIRA, Vital, et al.

- g. For works of unknown author, references and citations in footnotes start with the title.

### Author = entity

- a. Give the name of the entity as it appears in the source;
- b. If the entity appears in the form of initials or acronyms, the complete form is added between [...] (in this case, the first note must explain the abbreviation between [...]), except in cases where the entity is identified by the initials / acronym:

IAC [Canary Islands Astrophysics  
Institute] UNESCO

- c. If the author is an entity subordinate to a main entity, or if its full meaning depends on the presence of the name of the main entity, the latter must appear first, otherwise it is not necessary:

MINISTRY OF EDUCATION, North Regional Directorate for  
Education, WORLD HEALTH ORGANIZATION

- d. If there are different organisations with the same name, additional location information is added between [...]:

TRINITY COLLEGE [London] and TRINITY COLLEGE [Dublin]

**Author = editor (see point 2.5)**

- a. Author-editor (several authors)

PRATES, Ana, coord.

**Author = secondary responsibility**

- a. The names of authors or entities that perform a subordinate function (translators, compilers, illustrator editors, etc.) may appear after the title, with an indication of their function.

2.2. Title

- a. The title must be written as it appears in the source;
- b. The title of the publication must be typographically highlighted, preferably in *italics*;
- c. The subtitle follows the title, separated by a colon;
- d. In chapters or parts of books, in papers published in Congress proceedings, and in articles in periodicals (magazines, newspapers, journals...), the title to be highlighted is not that of the chapter, paper or article, but that of the main document, that is, of the book, proceedings or periodical in which the referenced text is included, that is, the documentary source where the article is located (see points 3.1.2, 3.1.4, 3.1.7, 3.2.2, 3.2.4, and 3.2.7);
- e. In the case of contributions in monographs (books), the title of the main source must be preceded by "In:" (see points 3.1.2 and 3.2.2);
- f. Book titles are always written in lowercase, except for the first word:

*Um ensaio sobre a constituição da Europa*

- g. The titles of journals or conference proceedings are always written starting each word with a capital letter:

*Revista de Direito Penal Internacional.*

*Atas do Colóquio Censura e Liberdade de Expressão em Portugal.*

- h. If the author's name cannot be determined with certainty, the title will appear as the first element of the reference;

- i. The title is also the first element:

- ✓ In certain types of resources, such as encyclopaedias;
- ✓ In resources resulting from cooperation between several collaborators (without significant role of author);
- ✓ In conferences, if no person or organization is identified as the author – conference name;
- ✓ periodicals, to which the name of the entity that publishes the periodical must be added, if it is not sufficient to identify the publication, or the place of publication, in the case of periodicals with the same name:

*Boletim trimestral.* Instituto das Artes.

*Natura* (Amsterdam). and *Natura* (Bucharest).

### 2.3. Edition number

- a. Mention of the edition number is only mandatory from the 2nd edition onwards, and it is given after the title;
- b. The edition must be specified as it appears in the source:  
  
3ª edição.  
3rd ed., revised.  
New enlarged edition.

### 2.4. Place of publication

- a. The data regarding the place of publication must be transcribed as it appears in the document, in the language of the document;
- b. If the location is known, but not mentioned, it can be given between [...];
- c. Location should be clarified for small, unknown locations: London.  
London (Ontario).
- d. If two or more locations are mentioned, mention only the first one.

### 2.5. Publisher

- a. Publisher data can be abbreviated, with omission of data non-essential for identification.
- b. This element must be selected according to the following order:
  - ✓ Publisher
  - ✓ Distributor
  - ✓ Printing company
  - ✓ Sponsor
- c. If more than one publisher appears in a document, mention only the first.

### 2.6. Date of publication

- a. The date is usually given by mentioning the year of publication;
- b. When the date of publication does not appear, the date of the duty copies, copyright, or printing is recorded:  
  
DC 1998  
cop. 1997  
print. 2003
- c. If there is no date, an approximate date is given:  
  
[ca. 1962]
- d. If such approximate date is not possible, the following is used:  
  
[no date]
- e. In certain types of documents, such as electronic resources, newspapers, and patents, the month and day may be needed, and are used in two ways:  
  
17 June 2018 or 17 Jun. 2018  
2018-06-17.

## 2.7. Numbering and pagination

- a. Numbering is a mandatory element in bibliographic references of periodical publications.
- b. It can be made up of the following elements: volume, issue, number, etc., from the largest to the smallest:  
  
vol. 20, No. 1, pp. 25-45
- c. The terms can be omitted, but highlighted typographically, with the volume in bold and the number in parentheses:  
  
**20(1)**, 25-45

## 2.8. Identifiers

- a. If the document has an international identification number, it must be included in the references:  
  
ISSN 0016-7568.  
ISBN 0.7493-8662-2.  
Available from: Doi: 10.1371/journal.pbio.1000269

## 2.9. Electronic resources

- a. The type of support must be mentioned after  
  
the title: [online].

- b. The date when the document was accessed must be given in square brackets:

[access. 06 Jan. 2017]

[access. 02 Feb. 2018]

- c. The access method (if it does not appear in the electronic address) and the electronic address of the cited document must be referenced. This information can be identified with the words “Available from” Available from + access method + electronic address

Available from the Internet: <http://..>

Available from: database name

- d. When it exists, information related to the DOI is preferred over the URL.

### 3. Bibliographical references by type of document

The elements that make up each of the bibliographic references vary according to the type of document and its format (printed or digital).

This handbook covers the following types of documents:

- ✓ Book;
- ✓ Book chapter;
- ✓ Journal;
- ✓ Journal article;
- ✓ Conference paper;
- ✓ Master’s thesis and Doctoral dissertation;
- ✓ Legislative documents.

Each table shows the elements that make up the bibliographic reference in their respective order, well as any observations and examples, with all types of documents subdivided within the formats: printed documents or digital documents.

#### 3.1. Printed documents

##### 3.1.1. Books and similar monographic items

Author. *Title: subtitle*. Edition. Place of publication: Publisher, Date, numbering<sup>11</sup>. ISBN.

- ✓ ANDRADE, Manuel da Costa. *Liberdade de imprensa e inviolabilidade pessoal: uma perspectiva jurídico-criminal*. Coimbra: Coimbra Editora, 1996. ISBN 972-32-0750-8.
- ✓ PRATES, Ana, coord. *Código civil anotado*. Coimbra: Almedina, 2017, Vol. 1. ISBN 9789724069944.
- ✓ ARAÚJO, Laurentino da Silva, anot. *Código de Processo Penal: atualizado e anotado*. Coimbra: Coimbra Editora, 1960.

##### 3.1.2. Contributions in books and similar monographic items (Book chapters)

<sup>11</sup> Needed only if the document is identified as part of a series.



Contribution author. Contribution Title: subtitle. In: Main author. *Main Title: subtitle*. Edition. Place of publication: Publisher, Date, Pages of the part. ISBN.

- ✓ MORGAN, Eleonor J. A política da concorrência na União Europeia. In: HEALEY, Nigel. *A doutrina económica da nova Europa*. Lisboa: Instituto Piaget, DC 1997, pp. 279-297.

### 3.1.3. Periodicals (serial publication / journals)

*Title: subtitle*. Edition. Place of publication: Publisher, Date, numbering<sup>12</sup>. ISSN.

- ✓ *Revista Jurídica Portucalense*. Porto: Universidade Portucalense, 2017, No. 15. ISSN 2183-5705.

### 3.1.4. Contributions in periodicals (articles in serial publication / journals)

Contribution author. Contribution Title: subtitle. *Main doc. Title: subtitle*. Edition. Place of publication: Publisher, Date, numbering, pages. ISSN.

- ✓ SILVANO, Gonçalo Xavier. Os tribunais e as urgências das respostas da justiça ao cidadão. *Revista Jurídica*. 2011, No. 14, pp. 81-91. ISSN 0874-2839.
- ✓ KALNINS, Arthurs and MAYER, Kyle J. Relationships and hybrid contracts: an analysis of contact choice in information technology. *The Journal of Law, Economics & Organization*. Oxford Oxford University Press, April 2004, vol. 20, No. 1, pp. 207-229. ISSN 2402-0712.

### 3.1.5. Master's theses e Doctoral Dissertations

Author. *Title: subtitle*. Additional note, Higher Education Institution, Place, Date.

- ✓ CARVALHO, Renato José Alves da Costa de. *O risco no contrato de seguro marítimo de mercadorias*. Master's thesis, Universidade Portucalense, Porto, 2015.
- ✓ SANTOS, Maria Alice Teixeira dos. *Avaliação de sítios educativos de apoio à aprendizagem da língua portuguesa*. Master's thesis, Universidade Portucalense, Porto, 2012.

### 3.1.6. Legislative and judicial documents – codes, plans<sup>13</sup>

Author. *Title: subtitle*. Edition. Place of publication: Publisher, Date, numbering. ISBN.

- ✓ PORTUGAL. *Código de Processo Penal*. Coimbra: Almedina, 2001.
- ✓ ARAÚJO, Laurentino da Silva, anot. *Código de Processo Penal: actualizado e anotado*. Coimbra: Coimbra Editora, 1960.

<sup>12</sup> Only for a specific issue of a series.

<sup>13</sup> The author heading for legislative documents such as Civil Code, Criminal Code, etc., is PORTUGAL. In the case of an annotated or commented document, the entry can be made by the author of the notes and comments. In both cases the order of books / monographic items is followed.

3.1.7. Legislative and judicial documents – laws, orders, ordinances, resolutions, etc., published in Diário da República<sup>14</sup>

Contribution Title: subtitle. *Main doc. Title: subtitle*. Place of publication: Publisher, Date, numbering, pages.

- ✓ Despacho n.º 1947/2018. *Diário da República*, 2ª Série. Lisboa: Imprensa Nacional-Casa da Moeda, 2018-02-23, No. 39, p. 5984.

### 3.2. Digital documents

#### 3.2.1. Books and similar monographic items

Author. *Title: subtitle* [type of support]. Edition. Place of publication: Publisher, Date [Date of access]. ISBN. Availability and access

- ✓ GERWICK, Ben C. *Construction of marine and offshore structures* [online]. 2.ª ed. Boca Raton (London): CRC Press, 2000 [access. 2004.08.19]. Available from the World Wide Web: <http...

#### 3.2.2. Contributions in books and similar monographic items (Book chapters)

Contribution author. Contribution Title: subtitle. In: Main author. *Main Title: subtitle* [type of support]. Edition. Place of publication: Publisher, Date, Pages of part [Date of access]. ISBN. Availability and access

- ✓ AMYES, Tina L., TOTEVA, Maria M., and RICHARD, John P. Crossing the Borderline between SN1 and SN2 Nucleophilic Substitution at Aliphatic Carbon. In: *Reactive Intermediate Chemistry* [online]. Hoboken: Wiley-Interscience, cop. 2004, pp. 41-68 [access. 2008.12.11]. ISBN 978-0-471-72149-9. Available from WILEY INTERSCIENCE.

#### 3.2.3. Periodicals (serial publication / journals)

*Title: subtitle* [type of support]. Edition. Place of publication: Publisher, Date, Numbering [date of access]. ISSN. Availability and access

- ✓ *Revista Jurídica Portucalense* [online]. Porto: Universidade Portucalense, 2017, No. 21 [access. 23 Jan 2018]. ISSN 2183-5705. Available from [https://www.redib.org/recursos/Record/oai\\_revista3391-revista-juridica-portucalenseportucalense-law-journal/Description#tabnav](https://www.redib.org/recursos/Record/oai_revista3391-revista-juridica-portucalenseportucalense-law-journal/Description#tabnav)

#### 3.2.4. Contributions in periodicals (articles in serial publication / journals)

Contribution author. Contribution Title: subtitle. *Main Title: subtitle* [type of support]. Edition. Place of publication: Publisher, Date, numbering, pages of contribution [date of access]. ISSN. Availability and access

<sup>14</sup> The elements of the reference follow the rules and order of serial publications.  
RE.GE.011.3

- ✓ SILVANO, Gonçalo Xavier. Os tribunais e as urgências das respostas da justiça ao cidadão. *Revista jurídica* [online]. 2011, No. 14, pp. 81-91 [access. 8 Nov 2015]. ISSN 0874-2839. Available from <http://hdl.handle.net/11328/1290>
- ✓ STRINGER, John A., et al. Reduction of RF-induced sample heating with a scroll coil resonator structure for solid-state NMR probes. *Journal of Magnetic Resonance* [online]. Elsevier. March 2005, **173**(1), 40-48. [access. 18 July 2006]. Available from: doi:10.1016/j.jmr.2004.11.015

### 3.2.5. Master's theses e Doctoral Dissertations

Author. *Title: subtitle* [type of support]. Additional note, Higher Education Institution, Place, Date [date of access]. Availability and access

- ✓ MAGALHÃES, M.D.M. *O direito das comunidades europeias: rumo a uma eventual constitucionalização?* [online]. Doctoral dissertation, Universidade Portucalense, Porto, 2002 [access. 01 Feb. 2018]. Available from the UPT Repository: <http://hdl.handle.net/11328/636>

### 3.2.6. Legislative and judicial documents – codes, plans<sup>15</sup>

Author. *Title: subtitle* [type of support]. Edition. Place of publication: Publisher, Date [date of access]. ISBN. Availability and access

- ✓ PORTUGAL. *Código de Processo Penal* [online]. 7ª Ed. Coimbra: Almedina, 2018 [access. 2 Jul. 2018]. ISBN 9789724074726. Available from the UPT Digital Library at: <http://catalogobib.upt.pt/>

### 3.2.7. Legislative and judicial documents – laws, orders, ordinances, resolutions, etc., published in the Official Gazette

Contribution Title: subtitle. *Main doc. Title: subtitle* [type of support]. Place of publication: Publisher, Date, numbering, pages [date of access]. Availability and access

- ✓ Decreto regulamentador regional n.º 21/2004/A. *Diário da República, 1ª Série-B* [online]. Lisboa: Imprensa Nacional-Casa da Moeda, 04-07-01, No. 153, pp. 4020-4026 [access. 02 Feb 2018]. Available from <https://dre.pt/>

## 4. Citations

A citation is an abbreviated way of referring in the text to the content of another author and must contain all the necessary information to allow an unequivocal correspondence between itself and the corresponding bibliographic references at the end of the document.

There are three types of in-text citations:

4. direct quotation – literal transcription of the author's text:
  - ✓ short
  - ✓ long
5. indirect citation - conveying the author's idea in your own words;
6. citation of a citation - when you do not have access to the original text.

<sup>15</sup> The author heading for legislative documents such as Civil Codes, Criminal Codes, etc., is PORTUGAL. In the case of an annotated or commented document, the entry can be made by the author of the notes and comments. In both cases the order of books / monographic items is followed.

ISO 690: 2010 provides for three forms of citations, which must always refer back to a list of bibliographic references at the end of the work:

1. author-date citation: the author and the date are mentioned in the text;
2. numerical citation: each resource is numbered in the specific order of citation;
3. footnote citation: each citation, ordered numerically, refers back to a footnote.

In this manual, only this last form of citation will be addressed, the footnote citation, which will be addressed next.

#### 4.1. Footnote citation

According to ISO 690: 2010, the citation of resources depends on the order in which they are cited, depending on whether it is the first citation or the following, according to the following rules:

1. Resources cited in the text are numbered in the order in which they appear in the text, referring back to footnotes, where the corresponding bibliographic references are given;
2. Several citations of the same resource correspond to different numbers of notes;
3. A different number should be used for each reference or group of references included in a citation. The corresponding note may include more than one resource.

The following examples show the rules for footnote citations:

First citation		
<b>In-text</b>	Continuous numbering <sup>1</sup> [1] (1)	Its absence among historians is noted by Stieg <sup>1</sup> . It may be, as Burchard <sup>2</sup> points out, that they have no assistance, or are reluctant to delegate <sup>3</sup> .
<b>In the footnote</b>	Complete bibliographic reference, according to the type of document, or include at least the author, the complete title, and the pages cited.	<sup>1</sup> STIEG, M. F. The information needs of historians. <i>College and Research Libraries</i> , 1981, <b>42</b> (6), 549-560. <sup>2</sup> BURCHARD, J. E. How humanists use a library. IN: C. F. J. OVERHAGE and J. R. HARMAN, eds. <i>Intrex: report on a planning conference and information transfer experiments</i> . Cambridge, Mass.: MIT Press, 3 Sept. 1965, pp. 41-87.

Following citations		
<b>In-text</b>	Continuous numbering 3 [3] (3)	Its absence among historians is noted by Stieg <sup>5</sup> . It may be, as Burchard <sup>6</sup> points out, that they have no assistance, or are reluctant to delegate <sup>3</sup> .
<b>In the footnote</b>	Repeat the reference of the previous note or refer back to the previous note:  SURNAME, ref. xxx, pp. xx (or p. x)	<sup>5</sup> STIEG, ref.1, p. 556.  <sup>6</sup> BURCHARD, ref 6.

ISO (International Organization for Standardization). *Information and documentation – Guidelines for bibliographic references and citations to information resources*. Third edition. Geneva, Switzerland: ISO, 2010.