



UNIVERSIDADE  
PORTUCALENSE

Do conhecimento à prática.

## **Regulations for Formatting Master's Project Works, Reports, and Theses, and Doctoral Dissertations**

Approved by the Rectorate on 5 January 2026

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## Introduction

This document and its annexes set the rules to be followed for the preparation and formatting of written work, under the 2nd and 3rd cycles of studies at Universidade Portucalense. It also summarizes a set of general methodological and technical aspects to be adopted when carrying out academic work pursuant to the Decree-Law No. 115/2013, of 7 August.

Accordingly, Doctoral Theses (or equivalents) and Master's-level work (Dissertations, Internship Reports, Projects, or any other work that may come to be legally recognized) presented for public defence at Universidade Portucalense, pursuant to national legislation and corresponding internal regulations, as a requirement for obtaining the degrees of Doctor or Master, respectively, shall comply with the rules set forth herein.

In this way, it seeks to guide and ensure the standardisation of general criteria concerning the internal structure and formatting of these 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 or procedures not regulated by this document.

This guide is divided into five parts:

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

## 1. Formal Structure

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

### 1.1. Front Matter

Elements placed before the body of the text, numbered with Roman numerals, in accordance with the template available on the University's internal system:

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<b>Cover, spine, and back cover</b>	These are only used for printed versions of documents. In order to facilitate the design of covers, the cover formatting standards (see Annex 3) and the cover template used for each department are available in the reserved area of the UPT website, allowing direct editing/alteration in the body of the text.
<b>Free end paper</b>	Blank page between the cover and the title page, used in the printed version.
<b>Title page / Cover</b>	All printed works must have a title page, which corresponds to the cover in digital works, and which follows the template available on the UPT intranet.
<b>Copyright and declaration of honour</b>	The type of copyright licence must be defined, and a declaration of honour must be included following the template provided.
<b>Statement of authorization for deposit in the institutional repository</b>	Mandatory for the correct deposit and availability of the work in the Institutional Repository, in accordance with Decree-Law No. 115/2013 of 7 August. The authorised type of availability must be selected.
<b>Disclosure of the use of generative Artificial Intelligence (AI) technologies and tools, software, and other support tools</b>	Statement on the scope of use of Artificial Intelligence tools in the development of the work.

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<b>Dedication</b> (optional)	On a separate page, right aligned.
<b>Author's acknowledgments</b> (optional)	On a separate page, mentioning the financial support (when applicable), right aligned.
<b>Epigraph</b> (optional)	On a separate page, after the acknowledgements, right aligned.
<b>Resumo</b>	<p>Written in Portuguese; must include the title and keywords.</p> <p>a. The abstract must not exceed 100 words in the case of Bachelor's degree papers, one page (about 200 words) in the case of Master's theses, or two pages (about 400 words) in the case of Doctoral Theses<sup>1</sup>.</p> <p>b. The abstract must briefly mention:</p> <ul style="list-style-type: none"><li>• The theme</li><li>• The aims of the work</li><li>• The methodology adopted</li><li>• Results obtained</li><li>• Main contributions</li></ul> <p>c. Keywords must appear in order of importance, from the most general to the most specific, with the first letter capitalised, separated by semicolons (;), up to a maximum of five.</p> <p>d. There must be spacing between the abstract and the keywords.</p>
<b>Abstract</b>	Abstract written in English, with the title and respective keywords in English. The Abstract must follow the same formatting rules as the <i>Resumo</i> .
<b>Table of Contents</b>	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 must not be mentioned.
<b>Lists of abbreviations and acronyms</b>	<p>. <u>Acronyms</u>: sequences of letters used instead of whole words, alphabetically;</p>

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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.

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(if applicable): . Abbreviations: reduced forms of words, alphabetically.

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

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## 1.2. Main Body

The body of the work must be organised into chapters, sections, and sub-sections, numbered sequentially. In the case of printed works, each chapter must begin on an odd-numbered page.

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**Introduction** The first chapter, unnumbered, must 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.

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**Body** This is the most relevant part of the work, expounding the project, research, or study. It comprises several chapters, numbered sequentially, namely:

- . Theoretical framework;
- . Methodology;
- . Analysis of results.

In the case of a thesis by publication, each article must correspond to a separate chapter in this section.

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**Conclusion** The last chapter, unnumbered, consists of a Conclusion. Beyond the work's main contributions – namely to theory and practice – it must include a discussion of research limitations and suggestions for future research.

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### 1.3. Back Matter

The body of the work must be organised into chapters, sections, and sub-sections, numbered sequentially. In the case of printed works, each chapter must begin on an odd-numbered page.

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**References** A list of all the works mentioned in the body, according to the rules stated by each department (see number 4).

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**Indexes of names, subjects, geographical, remissive, etc.** (optional) When applicable, these must be placed after the References.

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**Appendices and Annexes** (optional) Materials, produced by the author or otherwise, that, while not suitable for inclusion in the main body, complement the information needed for understanding and evaluation of the work (e.g. questionnaires, interview scripts, data tables, legal diplomas, and regulations).

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## 2. General Formatting

As mentioned above, to support the formatting of the work and with a view to institutional uniformity, templates adapted to the different departments of the University are available.

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<b>Printing</b>	The body of the text may be printed on only one side of each sheet or on both sides.
<b>Font type, colour, and size</b>	The recommended font is Helvetica Neue LT Light, size 11, with 1.2-line spacing and 10 points of spacing before the text; for footnotes, the recommended font is Helvetica Neue LT Light, size 8, with single spacing.
<b>Headings</b>	<p>It is recommended to use the same font type as in the body of the text:</p> <ul style="list-style-type: none"><li>. <u>Level 1 Headings</u> - Helvetica Neue LT Bold, size 14, 1.2-line spacing, bold style, single spacing;</li><li>. <u>Level 2 Headings</u> - The recommended font is Helvetica Neue LT Bold, size 11, with 1.2-line spacing and 10 points of spacing before the text;</li><li>. <u>Level 3 Headings</u> - The recommended font is Helvetica Neue LT Light, size 11, with 1.2-line spacing and 10 points of spacing before the text.</li></ul>

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### 3. Citations and Notes

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<b>Citations</b>	<p>Citations must be presented according to the rules recommended by each Department (see Annexes 1 and 2):</p> <ul style="list-style-type: none"><li>. The following methods are recommended, according to the scientific area:</li><li>· Author-date citation system: APA Standards 7th edition</li><li>· Footnote citation system: ISO 690: 2021 Standards<sup>2</sup></li><li>. Direct quotations (i.e., direct transcription of the author's words):</li><li>· Quotations of up to forty words must be enclosed in quotation marks within the body of the text. In this case, the citation must include the page number where the quoted text is found;</li><li>· Quotations longer than three lines should be set off from the text in a separate paragraph, using a smaller font size, justified, and indented 1 cm in relation to the body of the text, and must be single-spaced. They must not be enclosed in quotation marks and, as in the previous case, the citation must mention the page where the quoted text is found.</li></ul>
<b>Footnotes</b>	<p>Explanatory footnotes are used to give bibliographic references, clarify sources, and justify controversial points. They are also used to clarify notions, ideas, and passages, define concepts, provide translations, offer additional commentary, or cross-reference other works.</p>
<b>Footnote citation</b>	<p>For the footnote citation system, applied in the Department of Law, the use of abbreviations of Latin expressions is foreseen, in italics.</p>

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<sup>2</sup> NP ISO 690:2024 standards based on ISO 690:2021

## 4. References

Following the last chapter, a complete list of all works actually referenced throughout the text must be included under the heading References. This list must include all sources regardless of their format (printed or digital) and be arranged in alphabetical order by author surname, or by title if no authorship is given (see paragraph 2.3).

For the Department of Law, bibliographic references regarding legislation and case law should be included in a subsection, entitled Legislation and Case Law.

The standards used must be recognized by the national and international scientific community and correspond to those recommended by each Department, according to the scientific area of the work.

- . APA Standard (Annex 1);
- . ISO Standard 690 (Annex 2).

The referencing system to be used is that adopted by the Department responsible for the cycle of studies. Consistency is recommended in the preparation of bibliographic references. The system adopted must be used uniformly and consistently throughout the entire work.

## 5. 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 (Official Gazette) Series I, No. 180, of 15 September). 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 Theses must be submitted, in addition to the printed format in the case of the latter<sup>3</sup>, in digital PDF/A format<sup>4</sup>, reproducing the printed edition, and their content must be clearly legible in all the copies produced.

The submission of these works for archiving and dissemination in the Institutional Repository, through the General Library of Universidade Portucalense, must be authorized by the author. This is done by completing and including the 'Deposit Authorization Form,' referred to in section 2.1, specifying the access conditions:

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

### 5.1. Printed version

The printed version must follow 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.
- Guidelines already given throughout the document.

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<sup>3</sup> According to Decree-Law No. 65/2018 of 16 August, Master's theses, project works, reports, or works that replace them, must be submitted exclusively in digital format.

<sup>4</sup> Order No. 14167/2015, of 1 December, approves the list of formats authorized for the purpose of deposit in the RCAAP of said documents.

## 5.2. Digital version

The digital version must follow the following guidelines:

- It should consist of a single file (for works of up to 512 MB in size), or a limited number of files (for works larger than 512 MB).
- The files must be in PDF/A format, not protected with a password, and not encrypted. It must be ensured that the PDF is readable and accessible from any computer.
- Image, audio or multimedia files may also be included, preferably in standardized and non-proprietary formats.

Professor Fernando Manuel dos Santos Ramos, PhD

Rector of Universidade Portucalense Infante D. Henrique

05 January 2026

## ANNEX 1

### Guide to Citations and Bibliographic References - APA Standards<sup>5</sup>

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<sup>5</sup> Annex 1 to the Regulations for Formatting Bachelor's Works, Master's Project Works, Reports, and Theses, and Doctoral Dissertations — an internal document of Universidade Portucalense, prepared by the UPT General Library to support the academic community in formatting and creating citations and bibliographic references.

## Summary

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### Introduction

#### 1. General Guidelines

#### 2. Bibliographic References

##### 2.1. Rules for Compiling the List of Bibliographic References

###### 2.1.1. General Guidelines

###### 2.1.2. Author

###### 2.1.3. Title

###### 2.1.4. Edition

###### 2.1.5. Date of Publication

###### 2.1.6. Pagination and Numbering

###### 2.1.7. URL or DOI

##### 2.2. Order of Elements

###### 2.2.1. Printed Documents

###### Monographs (books)

###### Book Chapter

###### Scientific Article

###### Article in the Press

###### Conference Paper

###### Master's Thesis and Doctoral Dissertation

###### Report

###### 2.2.2 Digital Documents

###### Electronic Book

###### Electronic Book Chapter

###### Electronic Scientific Article

###### Conference Paper (Published in Book Form)

###### Conference Paper (Regularly Published Online)

###### Electronic Master's Thesis and Doctoral Dissertation

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###### Website or Information Extracted from a Website, Portal or Blog

#### 3. Citations

##### 3.1. Indirect Citation

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##### 3.3. Citation of Works Not Read by the Author

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## Introduction

This guide 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 its structure.

For more detailed information see:

- . 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: the author's last name, followed by the year of publication. Authors quoted in the text must appear in the references with the full information. Throughout the examples presented in this guide, the translation or adaptation into Portuguese of the terms established for the construction of in-text citations and bibliographic references was considered, presenting some examples of translation and adaptation into Portuguese, namely:

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

Fundamental rules in the use of some of the elements necessary for the elaboration of 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 present the details of the publication in order to allow an unambiguous 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 are dependent on specific rules, according to how they appear in the source of collection, the typology of the document, and the format of the document (printed or digital).

### 2.1. Rules for Compiling the List of Bibliographic References

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#### 2.1.1.

#### General Guidelines

- a. The list of bibliographic sources, entitled **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. **Interline spacing** should be reduced in relation to the rest of the work;
- d. Arrange the list in **alphabetical order of the last name of the first author**.
- 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;
  - ✓ in the case of multiple authors, the tiebreaker is the alphabetical order of the second author, third author, and so on, with the year only being used as a tiebreaker if it is not

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possible to use alphabetical order.

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<b>2.1.2.</b>	Person or entity responsible for the intellectual and / or artistic content of a document.
<b>Author</b>	

**Author = Person**

- a. The person's name is given in reverse order (Surname, initials, first name) and that of entities in direct order:

**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 comma, and the last author 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 followed by an ellipsis and then add the name of the final author. There must 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 role 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 mark;
- b. In cases where the document explicitly mentions anonymous / unknown author, this mention is inserted 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, newspapers, journals:
  - ✓ Capitalize the first letter of words and italicize;
- 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 inserted 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.

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

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**2.1.5. Date of Publication** a. Place the date of publication in parentheses immediately after the name(s) of the author(s). Place a full stop after closing the parenthesis.

b. When the work does not mention the date of publication, use the abbreviation *n.d.*, which means *no date*:

c. **Example:** (n.d.).

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**2.1.6. Pagination and Numbering** a. Pages in the references list should be presented 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 parenthesis, and then give the page numbers, with the limits separated by a 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. The standards advise mentioning 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.

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## 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:

- . Scientific article

- . Book
- . Book chapter
- . Conference paper
- . Master's thesis & Doctoral dissertation
- . Report
- . Websites and parts of websites
- . Blog post

For each type given 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 their respective formats: printed documents or digital documents.

### 2.2.1. Printed Documents

<b>Monographs</b> (books)	<p>Author (year). <i>Title: subtitle</i>. (Edition). Editor.</p> <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>
<b>Book Chapter</b>	<p>Chapter Author (year). Title: subtitle. In Main authorship<sup>6</sup>, <i>Title: subtitle</i> of main document (Edition, chapter pagination). Editor.</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;</li> </ul>

<sup>6</sup>Do not reverse the main document's author's name.

C. J. Rushton (Eds.), *A new companion to Malory* (2nd ed., pp. 144-163). D. S. Brewer.

**Scientific Article** Article author (year). Article Title: subtitle. *Title: subtitle of the journal, volume(issue)*, pages.

- . Goldfried, M. R. (2013). What should we expect from psychotherapy? *Clinical Psychology Review*, 33(5), 654-662.
- . George, A. L. Jr., & Neilson, E. G. (2000). *Genetics of Kidney Disease*. *American Journal of Kidney Diseases*, 35(4), 160-169.
- . Scruton, R. (1996). The eclipse of listening. *The New Criterion*, 15(3), 5-13.

**Article in the Press** Article author (year, month, day). Article Title: subtitle. *Title: subtitle, volume(issue)*, pages.

- . Peterzell, J. (1990, April). Better late than never. *Time*, 135(17), 20-21.

**Conference Paper<sup>7</sup>** Author (year). Paper Title: subtitle. In *Publication title / proceedings* (pagination in document). Editor.

- . Alvim, L. & 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 *Políticas de Informação na sociedade em rede: actas do 10.º Congresso da Associação Portuguesa de Bibliotecários, Arquivistas e Documentalistas, Guimarães* (pp. 72-95). BAD.

**Master's Thesis e Doctoral Dissertation** Author (year). *Title: subtitle* (Additional information). Institution name.

- . Alves, T. M. G. (2013). *Alterações climáticas: Cenários socioeconómicos para a Ria de Aveiro* (Master's thesis). University of Aveiro.
- . Horta-Monteiro, M.C.S.M. (1994). *Utilização de Água Residual Urbana na Cultura de Azevém (Lolium multiflorum Lam.)* (Master's thesis). Instituto Superior de Agronomia, Technical University of Lisbon.
- . Tingle, C.C.D. (1985). Biological control of the glasshouse mealybug using parasitic hymenoptera (Doctoral Thesis). University of London.

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

**Report**

Author (year). *Title: subtitle* (Report No. xxx). Editor.

- . Burton, N. W., Welsh, C., Kostin, I., & VanEssen, T. (2009). *Toward a definition of verbal reasoning in higher education: Research report* (Report No. ETS RR-09-33). Educational Testing Service.

## 2.2.2. Digital Documents

**Electronic Book**

Author (year). *Title: subtitle*. URL

- . Ashwin, P. (2006). *Changing higher education: The development of learning and teaching*.  
<http://books.google.pt/books?id=ZsVtbqmbHusC>
- . Ashwin, P. (2006). *Changing higher education: The development of learning and teaching*.  
<http://books.google.pt/books?id=ZsVtbqmbHusC>
- . Bryant, P. (2014). *Biodiversity and Conservation*.  
<http://darwin.bio.uci.edu/~sustain/bio65/Titlpage.htm>.
- . Conoloff, A. (2012). *Salvaging the suburbs*.  
<https://doi.org/10.8870/6001/2122.442.261>

**Electronic Book Chapter**

Author (year). Chapter Title: subtitle. In Author, *Main title: subtitle* (part pagination). URL

- . Napolitano, J. (2013). Development, sustainability and international politics. In L. Meuleman (Ed.), *Transgovernance: Advancing sustainability governance* (pp. 163–211).  
[https://doi.org/10.1007/978-3-642-28009-2\\_4](https://doi.org/10.1007/978-3-642-28009-2_4)

**Electronic Scientific Article**

Article author (year). Article Title: subtitle. *Title: subtitle of the journal, volume(issue), pages*. URL

- . Fine, M., & Kurdek, L. A. (1993). Reflections on determining authorship credit and authorship order on faculty-student collaborations. *American Psychologist*, 48, 1141-1147.  
<http://www.apa.org/journals/amp/kurdek.html>
- . Adler, J. (1999). Ghost of Everest. *Newsweek*.  
[http://newsweek.com/nw-srv/issue/20\\_99a/printed/int/socu/soo120\\_1.htm](http://newsweek.com/nw-srv/issue/20_99a/printed/int/socu/soo120_1.htm)
- . Brownlie, D. (2007). Toward effective poster presentations: An annotated bibliography. *European Journal of Marketing*, 41,

1245-1283. <https://doi.org/10.1108/03090560710821161>

- . Baniya, S., & Weech, S. (2019). Data and experience design: Negotiating community-oriented digital research with service-learning. *Purdue Journal of Service-Learning and International Engagement*, 6(1), 11–16.

<https://doi.org/10.5703/1288284316979>

**Article in the Press** Article author(year, month, day). Article Title: subtitle. *Magazine Title: subtitle*. URL

- . Richards, C. (2019, December 9). Best music of 2019: Lana Del Rey sings lullabies about the end of America. *Washington Post*. <https://www.washingtonpost.com/xxx.html>

**Conference Paper** (Published in Book Form)<sup>8</sup> Author (year). Paper Title: subtitle. In Author, *Title of publication/proceedings* (pagination in document). URL

- . Cretu, R. Z., & Negovan, V. (2012). Does providing personalized feedback in psychology teaching and learning differentiates students' academic performance? In M. Anitei, M. Chraif, & C. Vasile (Eds.), *Procedia - Social and Behavioral Sciences* (pp. 652–656). <https://doi.org/10.1016/j.sbspro.2012.01.202>

**Conference Paper** (Regularly Published Online) Author (year). Paper Title: subtitle. *Publication title*, numbering, pagination in document. URL

- . Herculano-Houzel, S., Collins, C. E., Wong, R., Kaas, J. H., & Lent R. (2008). The basic nonuniformity of the cerebral cortex. *Proceedings of the National Academy of Sciences* 105, 12593–12598. <https://doi.org/10.1073/pnas.Q805417105>

**Electronic Master's Thesis and Doctoral Dissertation** Author (date). *Title: subtitle* (Additional note, Institution). Database. URL

- . Alves, T. M. G. (2013). *Alterações climáticas: Cenários socioeconómicos para a Ria de Aveiro* (Master's thesis, University of Aveiro). Institutional Repository of the University of Aveiro. <http://ria.ua.pt/handle/10773/12141>.
- . Monteiro, A. J. (2012). *A Biblioteca 2.0 como mecanismo facilitador do ensino do português*. (Master's thesis, Universidade Portucalense). Institutional Repository of Universidade Portucalense. <http://repositorio.uportu.pt/dspace/>

**Reports** Author (year). *Title: subtitle* (Report No. xxx). URL

<sup>8</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.

. 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>

<b>Website or Information Extracted from a Website, Portal or Blog<sup>9</sup></b>	Author (year, month, day). <i>Title: subtitle</i> . Website/blog Title. URL
	<ul style="list-style-type: none"> <li>. Holinger, P. C. (2014, October 24). <i>Great kids, great parents: Infant/child development and the importance of children's feelings</i>. Psychology Today. <a href="http://www.psychologytoday.com/blog/great-kidsgreat-parents/201410/interferences-interest-in-the-talking-child">http://www.psychologytoday.com/blog/great-kidsgreat-parents/201410/interferences-interest-in-the-talking-child</a></li> <li>. American Society for the Prevention of Cruelty to Animals. (2019, November 21). <i>Justice served: Case closed for over 40 dogfighting victims</i>. <a href="https://www.aspca.org/news/justice-served-case-closed-over-40-dogfighting-victims">https://www.aspca.org/news/justice-served-case-closed-over-40-dogfighting-victims</a></li> <li>. Axelrod, A. (2019, August 11). A century later: The Treaty of Versailles and its rejection of racial equality. <i>Code Switch, NPR</i>. <a href="https://www.npr.org/sections/codeswitch/2019/08/11/74229330/5/a-century-later-the-treaty-of-versailles-and-its-rejection-of-racial-equality">https://www.npr.org/sections/codeswitch/2019/08/11/74229330/5/a-century-later-the-treaty-of-versailles-and-its-rejection-of-racial-equality</a></li> <li>. <i>Quantum mechanics</i>. (2019, November 19). Wikipedia. Retrieved November 25, 2019, from <a href="https://en.wikipedia.org/wiki/Quantum_mechanics">https://en.wikipedia.org/wiki/Quantum_mechanics</a><sup>10</sup></li> </ul>

### 3. 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 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.

<sup>9</sup> If the authorship belongs to 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>10</sup> If there is no author, use the title and include the retrieval date only if the content is likely to be updated.

### 3.1. Indirect Citation

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

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 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 following paragraphs of this guide.

### 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:

---

**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 interval of pages (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) says on 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).

**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 interval of pages (pp.).

**1.** 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 by the statement quoted by [or 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 Surname, Year of primary source)	"Bob Usherhood (1996, cited by Rivière, 2004, p. 50) is one of the authors who defends the impossibility of neutrality in scientific research...".
<b>Note:</b> In the list of bibliographic references only the primary source reference is included	Rivière, J. C. (2004). <i>Metodología de la documentación científica</i> . Madrid: Alfaaguara.

### 3.4. Authorship

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

1. 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 included in parentheses.
2. When entering 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.
3. 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, the rules 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 authorship is presented in one way whereas in the following times the authorship of that same citation is presented in another way.

Authorship information can appear in the in-text citation with or without parentheses. The following examples show the rules for presenting authorship in the in-text citation:

Author	1st citation in the text	2nd and following citations	Example
One author	(Surname, year)	(Surname, year)	(Matos, 2018)
	Surname (year)	Surname (year)	Matos (2018)
Two authors	(Surname1 & Surname2, year)	(Surname1 & Surname2, year)	(Matos & Bastos, 2018)
	Surname1 and Surname2 (year)	Surname1 and Surname2 (year)	Matos and Bastos (2018)
More than three 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)
<b>Note:</b> if two citations have the same abbreviation, the surnames of all authors necessary to distinguish them must be cited.			
Groups as authors (Institutions, organisations, etc.)	(Group name or Abbreviation of group name, Year of publication)	(Group name or Abbreviation of group name, Year of publication)	(University of Aveiro [UA], 2013)
	or	or	(UA, 2013)
	Group name or Abbreviation of group name (Year of publication)	Group name or Abbreviation of group name (Year of publication)	University of Aveiro (UA, 2013)
	<b>Note:</b> use the abbreviation of the name in cases of groups with recognised abbreviations or acronyms		
Without authorship indication	("Title", Year)	("Title", Year)	("Study Finds," 2007)
	(Title, Year)	(Title, Year)	(College Bound Senior, 2008)
	or	or	
	"Title" (Year)	"Title" (Year)	"Study Finds" (2007)
	Title (Year)	Title (Year)	College Bound Senior (2008)
<b>Note:</b> . in the case of documents without authorship 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.			

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Anonymous  
authorship

(Anonymous, Publication  
year)

(Anonymous, Publication  
year)

(Anonymous, 2018)

(the document  
itself mentions  
unknown author)

---

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)
In documents by the same author with the same date a letter (a, b, c, etc.) is added to the year of publication.	(Author surname, Year of document <sup>a</sup> , Year of document <sup>b</sup> ) or Author surname (Year of document <sup>a</sup> , Year of document <sup>b</sup> )	(Alves, 1984a, 1984b) or Alves (1984a, 1984b)

### 3.5. Other Cases

- 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 authorship:**
  - . 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).

## Bibliography

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

## ANNEX 2

### Guide to Citations and Bibliographic References - ISO 690:2021 Standard<sup>11</sup>

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<sup>11</sup> Annex 1 to the Regulations for Formatting Bachelor's Works, Master's Project Works, Reports, and Theses, and Doctoral Dissertations — an internal document of Universidade Portuguesa, prepared by the UPT General Library to support the academic community in formatting and creating citations and bibliographic references. Adapted from the *ISO 690: 2021 standard: Information and documentation – guidelines for bibliographic references and citations to information resources*.

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#### 4. Citations

##### 4.1. Citation in Footnote

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## Introduction

The ISO 690:2021 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 taken from several sources of information.

This guide is based on the international standards ISO 690: 2021, which repealed and replaced the previous standards, ISO 690: 1987, ISO: 690-2. 1997, and ISO 690: 2010.

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 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 guide 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 within each bibliographic reference are governed by specific rules based on how they appear in the source, the type of document, and the format (print or digital). Whenever possible, these details should be extracted directly from the cited resource. Data taken from a source external to the resources as 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 690:2021 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 inverted (SURNAME, Names) and the name of entities is in direct order:

**Example:**

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):

**Example:**

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

- d. An author identifier (e.g. ORCID) may be added when the name does not identify the author, in square brackets after the author's name:

**Example:**

GORDON, Dexter [ISNI: 0000 0001 1948 6061].  
DEXTER, David [ORCID: 0000-0002-7974-9588].

- e. If the publication has up to five authors, they must all be included in the reference, in the order in which they appear in the document:

**Example:**

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

- f. The name of the first author must be inverted, the remaining authors can be in direct order, with the surname in all caps:

**Example:**

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

- g. If the publication has six or more authors, all names must be listed where practicable; otherwise, the first five authors should be listed, followed by "et al." (et alii, Latin expression meaning "and others") or "and others," provided that the abbreviated form does not imply an inadequate correspondence between the citation and the list of bibliographic references:

**Example:**

MOREIRA, Vital, et al.

h. If the publication has multiple authors and at least one of the names is separated into several parts, a semicolon (;) must be used instead of a comma to separate the names of these authors:

**Example:**

KING, Martin Luther, Jr.; CARSON, Clayborn  
HERTLEIN, Leo; GRANT, Ulysses S.

i. For works of unknown authorship, 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:

**Example:**

IAC [Instituto de Astrofísica de Canarias]  
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:

**Example:**

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 [...], namely the identifier:

**Example:**

TRINITY COLLEGE [London] and TRINITY COLLEGE [Dublin]  
HELSINKY UNIVERSITY [ISNI 0000 0004 0410 2071]

**Author = Editor**

(See point 2.5)

a. Give the name of the entity as it appears in the source;

**Example:**

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 role.

## 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 conference proceedings, and in articles in periodicals (journals, newspapers...), the title to be highlighted is the one that is directly accessible.

When citing an online article that can be accessed directly, the emphasis is placed on the title of the article:

MADDOX, Brenda. *DNA's double hélice: 60 years since life's deep molecular secret was discovered*. The Guardian, 2013-02-22. ISSN 0261-3077. Available in <https://www.theguardian.com/science/2013/feb/22/Watson>. [accessed on 2020-07-23].

d. When citing a printed article, emphasis is placed on the main title, as this makes it easier to locate the article:

MADDOX, Brenda. DNA's double hélice: 60 years since life's deep molecular secret was discovered. The Guardian, 2013-02-22. ISSN 0261-3077.

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:

*Journal of International Criminal Law.*  
*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:

*Encyclopaedia Britannica*

. 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;

*International Conference on Scientific Information*

. 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 is given after the title;

b. The edition must be specified as it appears in the source:

*3<sup>a</sup> 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.
- e. If the location is unknown, use "s.l.".

## 2.5. Publisher

- a. Publisher data can be abbreviated, with omission of data non-essential for identification.
- b. If the location is known, but not mentioned, it can be given between [...];
- c. Location should be clarified for small, unknown locations:
  - . Publisher
  - . Distributor
  - . Printing company
  - . Sponsor
- d. If more than one publisher appears in a document, mention only the first.
- e. If the publisher is unknown, use "s.n.".

## 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:

[1962%]

- d. If such approximate date is not possible, the following is used:

[no date]

- e. In printed documents, the year is usually sufficient but, 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 to 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 may be omitted:

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.

b. If the document has a persistent identifier (e.g. DOI or Handle), this should be indicated

Available at: <http://doi.org/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. 2025-01-22]  
[access. 2024-07-12]

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 at + access method + electronic address

Available on the Internet: <http://...>  
Available in: database name

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

### 3. Bibliographic 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 Thesis;
- . Legislative documents.

Each table shows the elements that make up the bibliographic reference 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.

#### 3.1. Printed Documents

**3.1.1. Books and Similar Monographic Items** Author. *Title: subtitle*. Edition. Numbering<sup>12</sup>. Place of publication: Publisher, Date. ISBN.

- . ANDRADE, Manuel da Costa. *Liberdade de imprensa e inviolabilidade pessoal: uma perspetiva jurídico-criminal*. Coimbra: Coimbra Editora, 1996. ISBN 972-32-0750-8.
- . PRATES, Ana (coord). *Código civil anotado*. Vol. 1. Coimbra: Almedina, 2017. ISBN 9789724069944.
- . ARAÚJO, Laurentino da Silva (anot.). *Código de Processo Penal: actualizado e anotado*. Coimbra: Coimbra Editora, 1960.
- . FELL, Robin; Patrick MACGREGOR; David STAPLEDON; Graeme BELL and Mark FOSTER. *Geotechnical engineering of dams*. 2nd ed. Boca Raton [Fla.]: CRC Press, 2018. ISBN

<sup>12</sup> Needed only if the document is identified as part of a series.

9781138749344.

**3.1.2. Contributions in Books and Similar Monograph Items (Book Chapters)**

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.
- . MATULEVIČIUS, Jonas; Edvinas KRUGLY and Linas KLIUČININKAS. Utilisation of thermoplastic polymer waste for nanofiber air filter production. In: *Sustainable development, knowledge society and smart future manufacturing technologies*. Cham (ZG): Springer, 2015, pp. 283-290. ISBN 9783319148823.

**3.1.3. Periodicals (Serial Publication / Journals)**

Title: subtitle. Edition. Place of publication: Publisher. Numbering<sup>13</sup>, Date. ISSN.

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

**3.1.4. Contributions in Periodicals (Articles in Serial publication / Journals)**

Contribution author. Contribution Title: subtitle. Main doc. Title: subtitle. 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 and 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.

**3.1.6.** Author. Title: subtitle. Edition. Place of publication:

<sup>13</sup> Only for a specific number of a serial.

<b>Legislative and Judicial Documents</b>	Publisher, Date, numbering. ISBN.
<b>– Codes, Plans<sup>14</sup></b>	<ul style="list-style-type: none"> <li>. PORTUGAL. <i>Código de Processo Penal</i>. Coimbra: Almedina, 2001.</li> <li>. ARAÚJO, Laurentino da Silva (anot.). <i>Código de Processo Penal: actualizado e anotado</i>. Coimbra: Coimbra Editora, 1960.</li> </ul>
<b>3.1.7. Legislative and Judicial Documents</b>	Contribution Title: subtitle. <i>Main doc. Title: subtitle</i> . Place of publication: Publisher, Date, numbering, pages.
<b>– Laws, Orders, Ordinances, Resolutions, etc., published in the Official Gazette<sup>15</sup></b>	<ul style="list-style-type: none"> <li>. Despacho n.º 1947/2018. <i>Diário da República, 2º Série</i>. Lisboa: Imprensa Nacional-Casa da Moeda, 2018-02-23, No. 39, p. 5984.</li> </ul>

## 3.2. Digital Documents

<b>3.2.1. Books and Similar Monographic Items</b>	Author. <i>Title: subtitle</i> . Type of support. Edition. Place of publication: Publisher, Date. ISBN. Availability and access. [Date of retrieval]
	<ul style="list-style-type: none"> <li>. GERWICK, Ben C. <i>Construction of marine and offshore structures</i>. Online. 2nd ed. Boca Raton (London): CRC Press, 2000. Available from: &lt;<a href="http://">http://</a>... [consult. 2004.08.19].</li> <li>. NAJAFI, M. <i>Trenchless Technology Piping</i>. Online. New York, USA: McGraw-Hill Professional Publishing, 2010. ISBN 9780071640886. Available from: <a href="https://www.accessengineeringlibrary.com/content/book/9780071489287">https://www.accessengineeringlibrary.com/content/book/9780071489287</a>. [viewed 2023-08-10].</li> <li>. SPERELAKIS, Nicholas. <i>Cell physiology sourcebook: essentials of membrane biophysics</i>. Online. 4th ed. San Diego: Academic Press, 2012. ISBN 9780123877383. Available from: ScienceDirect, <a href="https://www.sciencedirect.com/">https://www.sciencedirect.com/</a>. [viewed 28 May 2023]</li> </ul>

<b>3.2.2. Contributions in</b>	Contribution author. Contribution Title: subtitle. In: Main author. <i>Main Title: subtitle</i> . Type of support. Edition. Place of
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<sup>14</sup> The author header for legislative documents such as the 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.

<sup>15</sup> The elements of the reference follow the rules and order of serial publications.

<b>Books and Similar Monographic Items</b> (Book Chapters)	publication: Publisher, Date, Pages of the part. ISBN. Availability and access. [Date of retrieval].
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- . AMYES, Tina L.; TOTEVA, Maria M. and RICHARD, John P. *Crossing the Borderline between SN<sub>1</sub> and SN<sub>2</sub> Nucleophilic Substitution at Aliphatic Carbon*. In: *Reactive Intermediate Chemistry*, online. Hoboken: Wiley-Interscience, cop. 2004, pp. 41-68. ISBN 978-0-471-72149-9. Available from WILEY INTERSCIENCE. [access. 2018.12.11].

<b>3.2.3.</b> <b>Periodicals (Serial Publication / Journals)</b>	<i>Title: subtitle</i> . type of support. Edition. Place of publication: Publisher, Date, numbering. ISSN. Availability and access. [Date of retrieval].
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- . *Revista Jurídica Portucalense* online. Porto: Universidade Portucalense, 2017, No. 21. 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). [access. 23 Jan 2021].

<b>3.2.4.</b> <b>Contributions in Periodicals (Articles in Serial Publication / Journals)</b>	Contribution author. Contribution Title: subtitle. Main <i>Title: subtitle</i> . Type of support. Edition. Place of publication: Publisher, Date, numbering, pages of contribution. ISSN. Availability and access. [date of retrieval].
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- . SILVANO, Gonçalo Xavier. Os tribunais e as urgências das respostas da justiça ao cidadão. *Revista jurídica*. Online. 2011, No. 14, pp. 81-91. ISSN 0874-2839. Available from <http://hdl.handle.net/11328/12901>. [access. 08 Nov 2015].
- . 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. Available from: <https://doi.org/10.1016/j.jmr.2004.11.015>. [access. 18 July 2006].

<b>3.2.5.</b> <b>Master's Theses e Doctoral Dissertations</b>	Author. <i>Title: subtitle</i> . Type of support]. Additional note. Higher Education Institution, Place, Date. Availability and access. [date of retrieval]
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- . MAGALHÃES, M.D.M. *O direito das comunidades europeias: rumo a uma eventual constitucionalização?* Online. Doctoral Thesis Universidade Portucalense, Porto, 2002. Available at the UPT Repository: <http://hdl.handle.net/11328/63>. [access.

01 Feb. 2023].

**3.2.6. Legislative and Judicial Documents – Codes, Plans<sup>16</sup>** Author. *Title: subtitle*, type of support. Edition. Place of publication: Publisher, Date. ISBN. Availability and access. [date of retrieval].

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

**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. Availability and access. [date of retrieval].

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

## 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 citations:

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

ISO 690: 2021 provides for three forms of citations, which must always refer 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;

<sup>16</sup> The author header 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.

2. numerical citation: each resource is numbered in the specific order of citation;
3. citation in footnote: each citation, ordered numerically, refers to a footnote.

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

## 4.1. Citation in Footnote

According to ISO 690: 2010, the citation of resources is dependent 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 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 must 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 creating citations in footnote:

### First citation

In-text	Continuous numbering	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> .
In the footnote	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, 42(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

In-text	Continuous numbering	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> .
	3 [3] (3)	

**In the footnote**

Repeat the reference of the previous note or refer 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.

## Bibliography

INTERNATIONAL ORGANIZATION FOR STANDARDIZATION. *ISO 690:2021, Information and documentation – Guidelines for bibliographic references and citations to information resources*. Fourth edition. Geneva, Switzerland: ISO, 2021.

## ANNEX 3

### Regulations for Formatting Dissertation and Thesis Covers



UNIVERSIDADE  
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Do conhecimento à prática.