



Writing Research Styles: A Primer

Writing Research Styles: A Primer on Rules and Forms © Copyright 2004 by Dr. Abel Scribe PhD

“Assembly of Japanese bicycle require great peace of mind!”

—Robert Pirsig, *Zen and the Art of Motorcycle Maintenance*

Style guides are instruction manuals for the assembly of research papers. And, like all complex sets of instructions—whether to assemble a Japanese bicycle or format a research paper—style guides give shape to the whole by directing the assembly of its parts. It can be difficult to see underlying order and logic to a research style as it is presented in a handbook, manual, or guide. Philosopher Robert Pirsig found this warning in a set of instructions: “Assembly of Japanese bicycle require great peace of mind” (Pirsig 158). Research styles are like that. This primer will reveal the order and form that lies at the heart of all research styles.

Styles become cluttered as they age. Pet nuances and details begin to fill the pages of a style’s guide. These microrules add little to achieving the style’s basic mission: the goals of *clarity*, *consistency*, and *precision* in research writing. The newest edition of a style guide never has fewer pages than the preceding edition. Guides get fatter with age.

It is essential to get the basic form right. This is not too difficult, as long as you learn what that form is. All styles are organized around three basic components: (1) documentation, (2) page layouts and formats, and (3) editorial style.

1.1 Documentation: Citing & Referencing Sources.

Documentation lies at the heart of research writing and scholarship. Research writing is a *dialogue*, a “written composition representing two or more persons as conversing or reasoning.” The dialogue takes place between the author and those who share an interest in the subject. This dialogue is on-going. In some cases the conversation began decades or even centuries earlier. Over time, others have contributed to it. Their contributions may be invoked in the present discourse. Readers may need to further explore these contributions, to replicate the author’s reasoning. Documentation—citations and references—enable this process. A research style is first and foremost a style of documentation. It is among its most characteristic and familiar features. You must get this right.

The *MLA Handbook* and the *Turabian Manual* devote about 40% of their content to documenting and citing sources. The *Chicago Manual of Style* finds the topic interesting enough to need over 160 pages to deal with it adequately, although the *APA Publication Manual* manages with only 75 pages. The mastery of these writing styles is centered on the process of documentation—the process of leading your readers to the material you found interesting and relevant enough to include in your work.

1.2 Page Formats & Layouts.

Research dialogues mostly take place in the pages of research journals. It helps the reader if the presentation of each article is orderly and consistent throughout the journal. The same holds for the format of a class paper, thesis, or dissertation. Margins, indents, the format of long quotations, page headers, headings and subheadings, even the typeface, are all specified by a research style. However, styles have mostly been crafted to assist the process of typesetting. The layout featured in a style guide may not be appropriate for formatting papers presented in their final form. Many style guides assume you understand the differences without being told! The details are not difficult to master.

1.3 Editorial Style & Form.

Language is often arbitrary and vague. Editorial style has evolved to impose order, albeit an arbitrary order, on the vagaries of the language. For example, one of the most common rules is the presentation of numbers. Do you write: “There were six questions on the test,” or, “There were 6 questions on the test?” Do you write out numbers, or use numerals? What numbers are presented in which format? Was it the “Twentieth Century,” the “twentieth century,” or perhaps the “20th century” or even the “20th Century?” The rules styles impose are arbitrary, sometimes even silly. But there is only a small set of these nested within a lot of clutter. Get the basic rules right, and whatever else you do, follow the most essential rule of research writing: Be consistent! Style guides are crafted to help you do just that.

1.4 Using the Primer.

It may be helpful to think of this guide as a series of lessons. Pace yourself. The major sections on (1) documentation, (2) page formats, and (3) editorial style stand on their own. If you have a copy of a style guide—any style guide—you may wish to use it to find specific examples and rules as you study. The major questions to ask when exploring a style are outlined at the end of the primer. The focus is on the central features of research styles—the stuff you use again and again. As for the rest, remember: “Assembly of Japanese bicycle require great peace of mind.”

Always follow the most basic rule of research writing: Be consistent!




Documentation: Citing & Referencing Sources

Documentation has two components. The first is the *text citation*, the flag raised in your text that the work of another is being noted. The citation leads to a *reference*, a description of the work being flagged or cited. There are only *two basic forms* of text citation.

There are only *three basic reference styles*, although these three styles are twisted and turned in an immense variety of ways. This is part of *The Great Perplexity*, and will be dealt with in a later section.

Only *four basic forms* are needed by a research style to reference almost any source. There are many different kinds of documents that can be referenced—journal articles, reports, Internet Web pages, books, newspapers, pamphlets, deeds, wills and other legal papers, drawings, paintings, and other works of art, and so on. But each of these sources will usually fit one of the four basic forms. References to Internet sources are still in a state of flux in some styles (MLA), but have been well defined in others (AMA, APA, Chicago). These sources are referenced as variants of one of the four basic forms; cited in the text as print sources are cited.

 To summarize, there are only (a) two forms of text citation, (b) three styles of references, and (c) only four basic reference-source forms.


2.1 Text Citations.

There are two ways to indicate to a reader that you are citing the work of someone else: with a *parenthetical citation*, or a *note citation*. The parenthetical citation system is also called the *author-date* system, the *name-year* system, and sometimes (I think) the Harvard system of citation. As the term *parenthetical* indicates, the citation is set in parentheses in the text. It contains the name of the author of the work cited, and (usually) the date of publication. If you are quoting a specific passage, the page number is added as well (Author, 2002, p. 1).

The American Psychological Association (APA) uses the author-date form of citation. The *Chicago Manual of Style* and *Turabian Manual* (they are both guides to the same Chicago style) have variants that use the author-date system as does the Council of Science Editors' (formerly the Council of Biology Editors) *Scientific Style and Format*. The Modern Language Association (MLA) also uses a parenthetical citation that is best described as "author-page." MLA style dispenses with the date in the citation.

The note citation style is more properly called the *citation-sequence* or *endnote-footnote* style. This system inserts a number in the text, usually in superscript format above the line of the rest of the text, in the sequence sources are cited. The number may refer to a footnote reference at the bottom of the page or to a set of endnotes or references at the end of the text.

Historians *always* footnote history, like this.¹ Science, and especially medicine, also use the citation-sequence (footnote-endnote) style. This is the style documented in the *Style Manual* of the American Medical Association. The *Scientific Style and Format* of the Council of Biology Editors (CBE) features both the citation-sequence and name-year (author-date) reference formats, and both are used in biology. While it is most common to use superscript number in the text to note a citation, some journal styles place numbers in parentheses in the text (1). This is just a variation on a common theme.

 There are two forms of citation: the author-date parenthetical citation style, and the citation-sequence footnote-endnote style. That's all.

2.2 References: Basic Styles.

References and citations travel in pairs. In most research styles, whatever is cited in the text must be referenced in the reference list, and only those works cited may be included in the reference list. Reference styles are also exclusively paired with the style of citation used in the text. There are three basic forms references can take: (a) author-date, (b) bibliography, and (c) endnote-footnote. Parenthetical text citations only work with the author-date and bibliography reference styles; superscript number citations work only with endnotes and footnotes.

A. Author-date reference:

Pirsig, Robert M. 1973. *Zen and the Art of Motorcycle Maintenance*. New York: Bantam Books.

B. Bibliography format:


Pirsig, Robert M. *Zen and the Art of Motorcycle Maintenance*. New York: Bantam Books, 1973.

C. Endnote/Footnote style:

1. Robert M. Pirsig. *Zen and the Art of Motorcycle Maintenance*. New York: Bantam Books, 1973.

(Note: Titles are shown both italicized and underlined for emphasis. In practice choose one or the other, but be consistent throughout your text.)

Can you spot the differences? Author-date references begin with the author and date. The bibliography format moves the date to the end of the references, as part of the publisher information. The endnote/footnote style restores the author's name to its normal order, and otherwise follows the bibliography format. *Hanging indents* are used for author-date and bibliography references, while a *paragraph indent* is often used for endnotes and footnotes.

 There are three basic forms references can take: (a) author-date, (b) bibliography, and (c) endnote/footnote. That's all. The author-date form is sometimes called the name-year style; the endnote-footnote form is sometimes referred to as the citation-sequence style.

All reference styles are variations on one of these three forms. The goal in referencing any source is to lead the reader to the document. The information included in a reference is tailored to achieve that goal. The reference styles featured in style guides and used by research journals (mostly) reference the same information, but in slightly different ways. But before exploring how things can differ, it's best to look at what they have in common.

2.3 References: Sources & Forms.

There are two citation styles, and three basic reference styles, and each of these three styles needs only *four basic reference formats* to reference most sources. These four basic forms are used to reference (a) books; (b) chapters or parts of books, works, or events; (c) periodicals; and (d) papers and reports. The basic forms are (in basic bibliography style):

A. Books:

Author's Name. *Title of the Book, Usually in Italics*, edition in plain text. City: Publisher, Date published.

B. Parts / Compilations:


Author's Name. "Title of the Chapter or Part, Often in Quotes." In *Title of the Compilation, Edited Book, or Volume: Usually in Italics*, edited by Editor's Name, page numbers. City: Publisher, Date published.

C. Periodicals:


Author's Name. "Title of the Article, Often in Quotes." *Name of the Journal, Magazine, or Newspaper: Usually in Italics*, Date, (Volume), Page numbers.

D. Reports:

Author's Name. "Title of the Report or Paper." Document Number If Any. Where the Paper or Report Was Found, Date published.

 There are four basic forms references can take: (1) books, (2) parts, (3) periodicals, and (4) reports. Other sources are formatted as a variation of one of these forms.

References are composed of five basic *elements*. These elements are the author(s), title (including the editor and title of a compilation), the publisher, the date, and the citation (page numbers, volumes, issues, sections, and so on). Some styles have added a sixth element in the form of an access statement for Internet sources. Others have embedded this statement in the citation in references to some sources (Chicago). The access statement notes the URL where a source can be found on the Internet, and usually the date you accessed it. Adding a generic access statement to the print form of a reference is a simple and generally acceptable way to reference any online source.

 There are five basic elements to a reference: (1) authors, (2) title, (3) publisher, (4) date, and (5) citation. Internet sources may be referenced by adding an access statement to the basic form of a reference in most styles.

2.31 Books. By custom, the city where the publisher has offices is listed before the publisher's name. This is an anachronism in the 21st century, since the author and title generally serve to locate any book. Still, the tradition continues.

Allen, Frederick Lewis. *The Big Change: America Transforms Itself 1900-1950*. New York: Basic Books, 1961.

A common variation to the basic form is to add an edition number. This trails the title (sometimes in parentheses) in plain text. This position in the reference is used whenever it is necessary to qualify the particular work being cited in some way. For example,

Kazantzakis, Nikos. *Zorba the Greek*, translated by Carl Wildman. New York: Simon & Schuster, 1952.

Kuhn, Thomas S. *The Structure of Scientific Revolutions*, 2nd ed. Chicago: University of Chicago Press, 1970.

The “author” of a book may be a group or an organization, a *corporate* author.

American Psychological Association. *Publication Manual of the American Psychological Association*. 4th ed. Washington, DC: American Psychological Association, 1994.

WEB: An *access statement* is added to reference a book found online:

Hacker, Diana. *Research and Documentation in the Electronic Age*. Boston: Bedford Books, 1997. Retrieved October 8, 1998, from <http://www.bedfordbooks.com/>.

2.32 Parts: Anthologies, edited volumes, & compilations. It is quite common to collect a series of papers by different authors and publish them in a single volume as an anthology, compilation, edited book, or edited volume (the name varies with the style). Sometimes these are papers previously published, sometimes they are prepared specially for the volume, sometimes they are papers given at a conference. The author of the paper, and its title, begins the reference, followed by the title if the volume and its compiler or editor.

Thoreau, Henry David. “Life Without Principle.” In *Thoreau: Walden and Other Writings*, edited by Joseph Wood Krutch, pp. 355-373. New York: Bantam Books, 1977.

This is the most complex of the reference forms. Note how the title of the chapter is placed in quotes, while the title of the volume is in italics. If a reference style places the title of a chapter in quotes, it will do the same with the titles of articles or papers in journals and newspapers when referencing those sources.

This form can be used to reference a single part of many different sources, for example, an entry in an encyclopedia, or a table in a statistical abstract:


Bergman, Peter G. “Relativity.” In *Encyclopedia Britannica*, 15th ed., vol. 26, pp. 501-508. Chicago: Encyclopedia Britannica, 1998.

Porter, W. F. “Turkey.” In *A Dictionary of Birds*, edited by Bruce Campbell and Elizabeth Lack, pp. 613-614. London: Poyser, 1985.

U.S. Bureau of the Census. “Higher Education Price Indexes: 1965-1991.” In *Statistical Abstract of the United States: 1993*, 113th edition, table 277. Washington, DC: U.S. Government Printing Office, 1993.

WEB: An *access statement* is added to reference a chapter in a book found online:

Reynolds, Richard C., and John Stone. “On doctoring: The making of an anthology of literature and medicine.” In *To improve health and health care: Vol. V. The Robert Wood Johnson Foundation Anthology*, edited by Stephen L. Issaacs & James R. Knickman. Retrieved June 26, 2003, from <http://www.rwjf.org/publications/publicationPdfs/anthology2002/chap8.html>.

 When information needed to complete a reference is missing, simply leave it out and use what you have (in two of the references above no editor is given; the Web reference lacks a city and publisher).

2.33 Periodicals. Most of the dialogue in research papers takes place with articles published in research and scholarly journals. Styles vary in the manner of presenting the date, volume, and page numbers of references to periodicals.

Brockner, Joel. "The Escalation of Commitment to a Failing Course of Action." *Academy of Management Review*, 1992, 17, pp. 39-61.

McLaughlin, Diane K., and Carolyn Sachs. "Poverty in Female-Headed Households: Residential Differences." *Rural Sociology* 53 (1988): 286-306.

In order for a reader to find this article they need to know the date, the volume number, and page numbers in the volume. Journals are typically published in volumes that may or may not coincide with calendar years. There may be just one issue in the volume, a dozen issues, or even more. Most journals number pages continuously within each volume, so the first page in each issue picks up where the last issue left off. If you know the volume number and page, you can find the article.

WEB: An *access statement* is added to reference a journal paper found online:

Morse, Stephen S. "Factors in the Emergence of Infectious Diseases." *Emerging Infectious Diseases* 1 (1995). Retrieved October 10, 1998, from <http://www.cdc.gov/ncidod/EID/eid.htm>.


There are subtle variations to this basic form at present. But as long as you add at least the URL, the requirements for documentation are adequately met. The access date has become more a matter of custom than necessity, but best included.

References to newspapers and magazines follow the same basic form.

Markoff, John. "Campuses are Hurt by Computer Giants' Woes." *New York Times*, January 12, 1993, p. B6.

Limerick, Patricia Nelson. "Dancing with Professors: The Trouble with Academic Prose." *New York Times Book Review*, October 31, 1993, pp. 3, 23-24.

Wilson, Edward O. "Back from Chaos," *Atlantic Monthly*, March 1998, pp. 41-62.

 *The date usually serves to locate a particular issue of a newspaper or magazine, so that is all that is cited in the reference (no volume number is given).*

WEB: An *access statement* is added to reference a newspaper article found online:

Markoff, John. "Voluntary Rules Proposed to Help Insure Privacy for Internet Users." *New York Times*, June 5, 1996. Accessed June 10, 1996 at <http://www.nytimes.com/.../yo5dat.html>.

2.34 Reports, papers, and dissertations. The final form common to all research styles is that for most stand-alone documents other than volumes and books. These may be government reports, dissertations, unpublished papers given at a conference, a video tape or music CD, and even a page on the World Wide Web. In other words, this is the catch-all form for whatever is left over.

Downey, Douglas B. "Family Structure, Parental Resources, and Educational Outcomes." Ph.D. dissertation, Department of Sociology, Indiana University, Bloomington, IN, 1992.

McFadden, Maggie. "Weaving the Cloth of International Sisterhood." Unpublished paper presented at the National Women's Studies Association conference, Minneapolis, June, 1988.

Morrissey, Elizabeth. "Work and Poverty in Metro and Nonmetro Areas." Rural Development Research Report No. 81. Washington, DC: U.S. Department of Agriculture, 1991.

WEB: An *access statement* is added to reference a Web page:

Dr. Abel Scribe PhD. "Research Writing Test." Retrieved from <http://www.docstyles.com/write.htm> on January 20, 2003.

2.4 References: Common Variations.

Every research style formats the same basic information, but just a little differently from every other style. Following is the same source referenced in author-date, bibliography, and endnote/footnote format, in four major styles. (You don't have to study these, just note that they're all a little different, often in subtle ways.) As noted, all the essential features and nuances of the entire of a reference style are can be observed in just one of the four basic forms, that for a chapter in an edited volume or compilation:

Author-Date

American Psychological Association (APA)

Hemingway, E. (1973). The big two-hearted river. In P. Young (Ed.), *The Nick Adams stories* (pp. 159-180). New York: Bantam Books.

Chicago Manual of Style

Hemingway, Ernest. 1973. The big two-hearted river. In *The Nick Adams stories*, ed. Philip Young, 159-180. New York: Bantam Books.

Council of Biology Editors (CBE) Variant

Hemingway E. 1973. The big two-hearted river. Pages 159-180 in Young P, ed. *The Nick Adams Stories*. New York: Bantam Books.

Bibliography

Chicago Manual of Style

Hemingway, Ernest. "The Big Two-Hearted River." In *The Nick Adams Stories*, ed. Philip Young, 159-180. New York: Bantam Books, 1973.

Modern Language Association (MLA)

Hemingway, Ernest. "The Big Two-Hearted River." *The Nick Adams Stories*. Ed. Philip Young. New York: Bantam Books, 1973, 159-180.

Endnote/Footnote

Chicago Manual of Style


1. Ernest Hemingway, "The Big Two-Hearted River," in *The Nick Adams Stories*, ed. Philip Young (New York: Bantam Books, 1973), 159-180.

Council of Biology Editors (CBE) Variant

1. Hemingway E. The big two-hearted river. Pages 159-180 in Young P, ed. *The Nick Adams Stories*. New York: Bantam Books, 1973.

Modern Language Association

1. Ernest Hemingway, "The Big Two-Hearted River." *The Nick Adams Stories*, ed. Philip Young (New York: Bantam Books, 1973), 159-180.

 *Underlining and italics are interchangeable in practice; both are combined in the examples for emphasis.*

Each of these styles manages to format the same information in slightly different ways. There are some basic things to look for.

2.41 Names. Some styles use the full names of authors and editors, some use initials for first and middle names. The order names are presented can also vary. APA style presents the names of all authors in “Lastname, F. M.” order, whatever the number of co-authors there may be to a work. If there are three authors the names are presented “Lastname, F. M., Lastname, F. M., & Lastname, F. M. But APA style presents the names of editors to a work in their normal order, “F. M. Lastname.” The key thing to note is that all styles do this a little differently.

2.42 Titles: Capitalization. Two styles of capitalization are used for titles: *heading caps* and *sentences caps*. Heading Caps Capitalize Every Word in a Title Except Articles, Conjunctions and Prepositions. Sentence caps capitalize the words in a title as you would in a sentence, just the first word and any proper nouns are capitalized (and the first word after a colon). A style may use one form of capitalization for the titles of books and another for the titles of articles and chapters.

2.43 Titles: Italics & quotes. It is common to place the titles of books in italics (or underline them) and to place quotation marks around the titles of articles, chapters, and reports. But once again styles vary. Scientific styles like the APA and CBE styles dispense with italics and quotes, while literary styles like Chicago and MLA use both.

2.44 Punctuation, abbreviations, & spacing. This will drive you nuts! Styles are idiosyncratic in the use of abbreviations and punctuation. It will require study—reference by reference—to get it right. Most styles require a single space after all punctuation is a reference, but sometimes no space follows a colon in a citation element.

2.5 Reference Styles: The Great Perplexity?

When just these few common variations are mixed and matched a variety of reference styles can be generated. But variations go much further in the vast array of slightly different styles used in the publication of research journals. There are literally thousands of minute variations. A few fields—psychology, medicine, electrical engineering, physics, and history—have consolidated around a single style, or are trying to. But even in medicine, where the effort has been under way for a quarter century, only 500–600 of over 16,000 medical journals published world wide have agreed to *accept* papers with references formatted in a common style. Many still continue to publish using their own special variant.

This is a modern Tower of Babel, wasting untold hours in senseless effort because journal editors insist on retaining their unique style. It makes using a reference style appear far more difficult than it actually is. Many students, and research authors, bypass using a style guide by simply emulating the style as published in a research journal. Just be careful to use the lead journal in the field as your guide for a class paper.

This note on The Great Perplexity is not calculated to intimidate. Rather, it is to draw your attention to just how confusing journal editors—each working alone—have managed make the world of research publication. Just remember, the confusion and complexity is in the world, not in your understanding of it. “Assembly of Japanese bicycle require great peace of mind!”



Page Formats & Layouts

Publishers and professors both want papers that are easy to read. But what works for one does not necessarily work for the other. Style guides are often quite explicit about the

differences. The APA *Publication Manual* calls papers that are to be read in their final form *final* manuscripts. Papers formatted for review and typesetting for publication are *copy* manuscripts. The *Chicago Manual of Style* and the APA *Publication Manual* are focused mainly on preparing copy manuscripts for publication (that’s why the APA calls it the *Publication* manual). On the other hand the *MLA Handbook for Writers of Research Papers* and Turabian’s *Manual for Writers of Term Papers, Theses, and Dissertations* are both guides to preparing final manuscripts. A major reason for compiling the *Student Guides* (available at www.docstyles.com) was to get around this problem—the *Guides* explain how to format final manuscripts. The differences are not great and are summarized at the end of this section.

3.1 Final Manuscripts.

A diagram readily explains a wealth of details, and most style guides include them for that reason. This is a diagram of the distinctive first text page of a paper in MLA style. Things to look for in any style include:

3.11 Margins. Most styles require one inch margins around a page. Only the page number header goes outside the margins.

3.12 Justification. Don’t break words to wrap lines of text. Leave the right margin without justification, a *ragged right* margin.

3.13 Page header. This is usually the short title of the paper (MLA uses the author’s last name). It is double spaced above the text in the margin space (about one-half inch below the top of the page) in most styles.

3.14 Page numbers. Styles vary, but most require that every page be numbered. The favored position is at the upper right of the page, although some styles (not MLA) place the page number at the bottom center of the title page and the first page of a chapter.

3.15 Line spacing. Double space the text in most styles, although some styles encourage single spacing within block quotes, titles and headings, tables and references, with double spacing before and after these features. This is often called *block paragraph spacing*.


3.16 Headings & subheadings. All styles differ. APA style encourages the use of a bold fonts when this improves the appearance of a paper. The *MLA Handbook* doesn’t even mention headings, but the *MLA’s* own journal—presumably following the *MLA’s* own style documentation—publishes papers with headings. It’s wise to check.

3.17 Typeface. Most styles suggest a fairly large 12-point font, but by tradition accept the 10-point font used on many typewriters. APA style requires a serif font (e.g., Times, Courier); most styles don’t care which you use.

	Author’s Lastname 1
First M. Lastname Professor Adams Humanities 101 1 April 2004	<p style="text-align: center;">Centered Title in MLA Style</p> <p>MLA style has this unique format for the first page of a final manuscript—a class paper. Papers should not begin with the heading “Introduction.” All papers start with an introduction. MLA style is unique in not using headings in a paper.</p> <p>Quotes that require more than four lines when typed are indented one inch as block quotes. The quote is usually introduced with a colon. Henry David Thoreau admonished his readers that:</p> <p style="padding-left: 40px;">To be a philosopher is not merely to have subtle thoughts, nor even to found a school, but to so love wisdom as to live according to its dictates, a life of simplicity independence, magnanimity, and trust. (15)</p> <p>Not every style is as idiosyncratic as MLA’s; these arbitrary features must be followed.</p>

3.18 Block quotes. All styles have their own rules for when to set a quote in block format, indented from the rest of the text.

3.19 Page order. References always come last in a research paper (unless the paper is for publication). The standard order is: title page, abstract, text, notes, appendix, references.

 *Follow the basic form, but make your paper look good.*

Don't hesitate to add features to improve appearance, such as a bold font for headings, or use of block paragraph spacing, unless you have a fussy grader. Report covers make a paper hard to read, use a single staple in the upper left corner instead. Never irritate your reader by the physical appearance of your paper, or the mechanics of reading it.

3.2 Copy Manuscripts?


Manuscripts intended for publication differ from final manuscripts (class papers) in that all text is usually double spaced, and figures, tables, and graphs are placed on separate pages after the references. This works for the typesetter, but makes the paper hard to read.



Editorial Style & Form

Reference formatting is tedious—everything right down to the punctuation marks are specified in most research styles. A good style sheet with many examples is an essential resource. Page formatting is straight forward when you get the basics right. But the features that fall in the category of *editorial style* can be damnably frustrating to master. Remember the admonition: “Assembly of Japanese bicycle require great peace of mind.” You may need the patience of a Zen master to fully command the nuances research styles have invented.

Editorial style addresses questions like when to use numerals for a number, and when to write it out; or how long must a quotation must be before it is set as a block quote? Beyond the basics, every style manages to concoct obscure rules that require intensive study to master. Obscure rules lurk in places where we don't even think to look. What's important to know is that there are basic features that all styles address, and there are obscure rules to trip up even the most diligent student. Focus on getting the basics right, save the obscuranta for your dissertation. (Examples of weird and silly rules comes at the end of this section.)

 *The first and most essential goal in research writing is clarity, followed by consistency and precision. Research styles are devised to serve these goals.*

4.1 Abbreviations & Acronyms.

Two rules for presenting abbreviations in a text are widely shared:

1. Introduce an acronym by giving the full term the first time it is used, trailed by the acronym in parentheses. Then use just the acronym. For example, write: “The Modern Language Association (MLA) publishes a style guide. The MLA also publishes a journal.”
2. Never use Latin abbreviations in your text (except in parentheses), write them out. Do not write *e.g.*, write *for example*. Common Latin abbreviations are (cf., e.g., et al., etc., i.e.).

Don't overuse acronyms, don't use weird or lengthy acronyms. If a term is used only a few times in your paper, write it out each time. Familiar acronyms like *FBI* do not have to be written out the first time you use them. The plural of an acronym adds an *s* without an apostrophe.

4.2 Capitalization.

Two forms of capitalization are used in research writing, *heading caps* and *sentence caps*. Research styles often have special rules for formatting heading caps. Always check.

- A. Heading Caps are Often Used to Format the Titles of Books and Articles Cited in a Paper or in References. Rules for what to capitalize varies with the style. APA style capitalizes all words of *four characters or more*, while MLA style offers a list of words not to capitalize. Common sense will usually serve.
- B. Sentence caps capitalize just the first word of a title, proper nouns, and the first word after a colon in a title.

You must also check a style guide to use these forms of capitalization precisely in your text. For example, APA style uses sentence caps for titles in references, but uses heading caps if those same titles are quoted in the text. Headings and subheadings may mix and match capitalization styles, as may figure and table headings and captions, and so on.

4.3 Dates.

APA style uses the American date format: April 1, 2003. MLA style uses the universal format: 1 April 2003. CBE style has a third variant.

4.4 Emphasis.

It is often necessary to emphasize a keyword or term being introduced. Two forms are available for doing this, placing the word or term in italics, or placing it in quotes. Most styles prefer italics most of time, but check. Once the term is introduced—in quotes or italics—it is set in plain text thereafter.

4.5 Figures, Graphs, & Tables.

The easiest way to format a table, graph, or figure is to find one in a journals that uses the style you're working with and emulate it in your paper. The APA *Publication Manual* devotes 50 pages to tables and figures; the MLA *Handbook* about two pages.

4.6 Numbers.

Oh woe! Styles vary greatly in how they present numbers. APA style is probably closest to common usage (except for some really weird rules). Numbers zero through nine are written out; numbers over 10 use figures or numerals. Chicago writes out numbers through ninety-nine. CBE style never writes out numbers. MLA style writes out numbers when only one or two words are needed to do so, otherwise numerals are required. You must check the rules for the style you are using.

One rule common to most styles is that precise measures use numerals. "We thought we walked *about five miles*, but on the map the distance was given as *7.3 miles* exactly."

Never begin a sentence with a numeral. Write the number out or (preferably) rewrite the sentence.

4.7 Punctuation & Grammar.

Most research styles follow conventional American rules for grammar and punctuation. They may articulate these as an added feature in their style guide, but need not be searched for special rules, with a few exceptions. Strunk & White's classic *The Elements of Style* is a useful basic guide to grammar and usage. A more comprehensive guide to grammar and usage is recommended—there are many available—as well as a good dictionary.

4.71 Character spacing. Some styles require putting only a single space after all punctuation (e.g., APA). This is fine when formatting references, but should probably be ignored elsewhere in your text unless you are submitting the paper for review and publication. The convention is to single space after commas and semicolons, double space after periods, colons (single space when in a title), exclamation points, and question marks.

4.72 Colons. Some styles required the first character after a colon to be capitalized. This is common in all styles when the colon appears in a title or heading. But some styles require it when the text following the colon will stand as a complete sentence.

4.73 Seriation (enumeration). *Seriation*, also called *enumeration*, is the familiar process of (a) itemizing items in a list, to (b) draw special attention to each item, when (c) it is helpful to introduce them for further discussion. Some styles use letters as in this example, but some prefer numerals.


4.8 Quotations.

All style guides have special (and different) rules for when to set a longer quotation as a block quote, and how to edit quotations.

APA style requires block quotes when quotations are *40 words or longer*, but MLA style uses block formatting when *more than four lines* are required to type the quote in the text. There are also special rules for indenting paragraphs in block quotes.

When you quote someone, you must quote them *exactly*. However, research styles also encourage you to merge quotations into the flow or syntax of your text, so every research style has rules for editing quotations. Most recognize these conventions:

- A. Quote the original *exactly*. When there is an error or unusual usage (unless it is an obvious typographic error), indicate the error is being reproduced faithfully from the original [sic] by adding *sic* (Latin *thus*) in brackets and italics after the word.
- B. You may omit material—an *ellipsis*—when you use *ellipsis points* (three periods with a single space before, between, and after each period) to indicate you have done so. For example, the original quote: “We discovered, much to our amazement, that the lump of coal was black” may be rewritten: “We discovered . . . that the lump of coal was black.”
- C. You may add material to a quote by placing it in brackets. For example, the *Times* reported “they [the Irish Republican Army] declared a cease-fire on Tuesday.”
- D. You may add emphasis (italics) to a word in a quotation if you add a note *indicating you have done so* [italics added] in brackets. Placement of this note varies by style!

 Rules for editing quotations can get quite complex. Check a style guide!

4.9 Really Silly Rules?

Many styles *elide* inclusive ranges of numbers. This is the process of dropping digits from the second number. They concoct rules for doing this. Those for MLA style are:

When writing numbers through 99 give the full digits. For example, write 42-48 not 42-8. Page numbers above 99 require only the last two digits of the second number as long as the result is unambiguous. Leading zeros are not dropped in MLA practice. Write pages 1123-24 not 1123-1124; pages 2000-04 not 2000-4 or 2000-2004. Write pages 112-35 and pages 102-121, but write pages 102-08 not 102-8 or 102-108.

Chicago style applies different rules. These examples from the *Turabian Manual* (36):

3-10	600-13	1002-6	1496-504	71-2	100-23	321-5	14325-8
96-117	107-8	415-532	11564-78	100-4	505-17	1536-42	3729-803


What rule is at work here? What larger goal is served by this complexity?

4.10 Really Weird Rules!

APA style has a special rule for using numbers in reporting experiments. If the numbers are describing the *participants* of the experiment, numerals are always required. Otherwise the numbers under 10 are written out.

“The 4 rats and 6 professors ran the maze as five students observed.” The rats and the professors are *participants* in the experiment (running the maze), but the students are just *observers*. So numerals are required for the former, but not for the latter (APA 124).

There is no way to anticipate a weird rule like this, no way to know what question to ask to uncover it. The important thing is not to dwell on these rules when you come across them, just be aware that research styles are capable of formulating this kind of nonsense.

 When you run into really strange rules just ignore them and stick to the basics. All really important style rules enhance the clarity, consistency, and precision of your presentation. When those goals are not served, the rule doesn't much matter.



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Research Style Discovery Outline

If you are new to using a particular research style it can be helpful to get acquainted. Doing so will likely save you time when it comes to actually using the style.

I. Documentation

- A. Citations. There are only two forms of text citation:
 - 1. Parenthetical, author-date, or name-year citations?
 - 2. Endnote/footnote, or citation-sequence citations?
- B. Reference style. There are only three basic reference styles.
 - 1. Author-date, or name-year style?
 - 2. Bibliography style?
 - 3. Endnote/footnote, or citation-sequence style?
- C. References sources & forms. There are four basic references forms to study:
 - 1. Books.
 - 2. Chapters or parts of works.
 - 3. Periodicals.
 - 4. Reports.
- D. Ask these questions; make a special note of abbreviations and punctuation.
 - 1. How are authors' and editors' names formatted?
 - a. Do you use full names, or last names with initials?
 - b. What is the order of first and last names? Is this for all authors or just the first? Do editors' names follow the same order?
 - c. Does the style use a conjunction (*and* or *&*) before the last name in a list of names?
 - d. What punctuation is required in a list of names?
 - 2. How are titles of books formatted?
 - a. Are book titles set in sentence caps or heading caps?
 - b. Are book titles set in italics?
 - 3. How are the titles of chapters or parts of a work formatted?
 - a. Are chapter titles set in heading caps or sentence caps?
 - b. Are chapter titles placed in quotation marks?
 - 4. How are references to periodicals formatted?
 - a. Are article titles placed in quotation marks? (This should be the same as for chapters or parts of works.)
 - b. Are chapter titles set in heading caps or sentence caps? (This should be the same as for chapters or parts of works.)
 - c. Is the name of the journal set in italics?

5. How are reports formatted?
 - a. Are the titles of reports set in heading caps or sentence caps? (This may be the same as for titles of journal articles and chapters.)
 - b. Are the titles of reports set in quotation marks, or italics as in APA style?

II. Page Formats

- A. Margins. The standard margin is one inch on all four sides of a page. Does this hold for the style you are using?
- B. Page headers are used by most research styles.
 1. Is the page header set at the top right of the page, in the margin space?
 2. What is the content of the header? Most styles use a short form of the title; MLA uses the last name of the author.
- C. Page numbers are required by all styles.
 1. What pages are numbered?
 2. Where does the page number go on the page? On all pages?
- D. Text spacing.
 1. Double spacing is common for all research papers.
 2. Block paragraph spacing (single spacing within titles, headings, captions, block quotes, and references) is recommended in some styles (APA) and prohibited in others (MLA), what about your style?
- E. Headings. The MLA *Handbook* offers no instructions for headings, yet the MLA's own journal, *PMLA*, publishes papers with headings. What headings does your style specify?
 1. Where are the various levels of headings placed on a page? The common sequence for each level is (a) centered, (b) flush left with the margin, and (c) indented as a paragraph.
 2. How are the various levels of headings formatted?
 - a. Top level. Is the heading set in heading caps or sentence caps? Is it set in italics or bold type? Is it centered, flush left, or indented?
 - b. Second level. Is the heading set in heading caps or sentence caps? Is it set in italics or bold type? Is it centered, flush left, or indented?
 - c. Third level. Is the heading set in heading caps or sentence caps? Is it set in italics or bold type? Is punctuation required? Is it centered, flush left, or indented?
- F. Typeface. All styles specify a preference or offer instructions.
 1. What is the preferred size of the type face, 12-point, 10-point?
 2. Is there a preference for a particular font? APA prefers a serif typeface.
- G. Special title page? MLA style has a distinctive title/first-text page. Does your style?
- H. Block quotes.
 1. How long must a quote be before it is set as a block quote? APA requires block formatting for quotes of 40 words or longer. MLA style requires block formatting when the quote runs to more than four lines when typed. What about your style?

2. How far is a block quote indented. APA and most other styles indent one-half inch. MLA style indents one inch.

III. Editorial Style

Editorial style governs the formatting of various features in the text of research papers. Often the rules are arbitrary. Some are basic, found in most papers. Others are profoundly obscure and uncommon, and deservedly ignored. These subjects range too widely for any one set of questions to be relevant. Read the appropriate corresponding section in the style guide to get acquainted.

- A. Abbreviations and acronyms.
- B. Capitalization. (NB What are the rules for heading caps?)
- C. Dates. (Use American Day-Month-Year format or . . . ?)
- E. Emphasis. (What are the rules for adding emphasis to words in the text, in quotes?)
- F. Numbers. (Styles impose their own rules for when to use numerals and when to write numbers out. These can get quite complex.)
- G. Punctuation & Grammar
 1. Are there special rules for spacing after punctuation? Should you care?
 2. How do you use a colon in this style?
 3. What is the preferred form for seriation: letters or numbers?
- H. Quotations. All styles provide rules for editing quotations.
 1. How do you correct obvious errors in a quotation?
 2. What can be changed in a quote without having to indicate the change (e.g., some styles allow you lowercase an uppercased word and vice versa)?
 3. How do you add text to a quote to improve clarity?
 4. How do you delete text from a quote when it is unnecessary or intrusive?
 5. How do you insert special emphasis in a quote to draw your reader's attention to a word or passage?



Writing Research Styles: A Primer on Rules and Forms
by Dr. Abel Scribe PhD, 2004. Available at: www.docstyles.com.