Bibliographical notes, references, citation lists
Educational materials for students writing works in English

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Introduction

Every dissertation, thesis, scientific article, and final paper features its own back matter. It is an element of a scientific publication that shows the cited source materials used or described by the author. Among the most important back matter elements are the bibliographical notes and the citation list.

The use of bibliographical notes and citation lists not only lends credibility to the facts described by the author - it also allows the reader to find the works that the author based his own works on. Moreover, it may protect the author from accusations of plagiarism.

While browsing literature, we may feel lost. Various publishing houses, science institutes, supervisors etc. establish diverse rules pertaining to creating bibliographical notes and citation lists.

This work employs the standard of PN-ISO 690: 2012 Information and documentation. Guidelines for bibliographical notes and references to information resources.

The application of Polish Standards (PN)¹ in the context of creating bibliographical notes and citation lists is discretionary. Many authors, book publishing institutions, and scientific communities treat them as guidelines for drawing up the back matter of their text, not always rigorously observing the Standard's requirements. Either way, the Standard cited above provides various examples of composition of the particular elements of bibliographical descriptions.

What should one do in the light of such diversity among the methods of composing bibliographical descriptions? Above all, one should work to ensure that their bibliographical descriptions are clear and legible, be rigorously consistent when it comes to their form across the entire body of work, in bibliographical notes and in the citation list alike, and choose a system of linking the references contained in text with reference lists that will remain uniform throughout the entire body of work.

We recommend that students observe the advice of their thesis supervisors, i.e. the rules of their University. When it comes to authors of monographs, chapters, and academic journals, we recommend the guidelines of the publishing house they send their works to.

1. Types of notes

Notes are explanations, comments or remarks added to the work’s text, usually at the bottom of the page, at the end of the chapter, or at the end of the work. They are an

¹ “A standard sets forth rules, guidelines or characteristics applicable to various types of activities or results thereof; it is approved on a consensual basis and intended for general and repeated use, accepted by all parties concerned as an advantage for all, and it introduces a code of best practice and rules of rational behaviour in the context of the current state of the art”. Cit. per: What is a ‘standard’? [In:] Polski Komitet Normalizacyjny, [online], https://www.pkn.pl/en/na-skroty/faq, pt. 1 [accessed: 15.10.2020].
indispensable element of every scientific work, showing i.a. knowledge of literature regarding the topic being discussed and the author’s erudition, and constitute an indicator of knowledge of the scientist’s craft. According to their contents and character, notes are divided into:

1. substantive notes - explaining and commenting parts of the main text. They are further divided into:
   a) polemical notes

   ¹ The incorrect evaluation provokes certain reservations...
   ² It is difficult to accept statements...
   ³ Notwithstanding the fact that the views...

   b) digressive notes

   ¹ The dangers of free time mismanagement are pointed out by...
   ² A perfect example of a well-planned recreational activity is...

   c) reference notes

   ¹ In order to learn more on children’s safety during organised sightseeing-and-tourist activities, see...
   ² This problem is expanded upon in Chapter...

2. dictionary notes - explaining the meaning of foreign or native terms, etc.

   ¹ Running head - a line above the print column containing, apart from the page number, a repetition of the title of the work or a part or a chapter thereof; in encyclopaedias and dictionaries - usually the first or final entry of the page. Sobol E. (red.), Słownik wyrazów obcych [“A dictionary of foreign words”], 1999, s. 810.
   ² Omnium consensu - with everyone’s consent.

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3. Bibliographical notes - notes containing bibliographical descriptions of the cited works. They are features of the document (book, journal article, webpage etc.), appearing in a set order, clearly characterising it and distinguishing it from other documents.


2. Bibliographical notes

A “bibliographical note” is a shortened bibliographical description. There are three main reasons to use bibliographical notes in a scientific text:

1. The entirety or a part of someone’s text may only be inserted as a quote placed between quotation marks, with the source referred to in the notes.
2. Someone’s text may be paraphrased, but the paraphrased text must be referred to in the notes.
3. When creating a compilation, one must provide the source of inspiration in the notes.

The above Standard details the elements recommended to be included in most kinds of bibliographical notes for printed and electronic information resources and provides a recommended order of their presentation.

Below are listed bibliographical note templates and examples of documents most commonly cited in scientific works and theses.

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4 Paraphrase - to change or expand upon someone’s thoughts or text. Cit. per: *Parafraza* [In:] E. Sobol (red.), *Słownik wyrazów obcych* [“Dictionary of foreign words”], Warsaw, Polish Scientific Publishers PWN, 1999, p. 824.

5 Compilation - a work, piece or a derived work构成ing an amalgamation of parts of other works, or an assortment of research performed by someone else. Cit. per: *Kompilacja* [In:] E. Sobol (red.), *Słownik wyrazów obcych* [“Dictionary of foreign words”], Warsaw, Polish Scientific Publishers PWN, 1999, p. 575.
2.1. Bibliographical notes referring to printed documents

Table 1. List of necessary elements of bibliographical notes referring to basic printed documents

<table>
<thead>
<tr>
<th>Description element</th>
<th>Type of document</th>
<th>Author of the chapter/article</th>
<th>Title of chapter/article</th>
<th>Author/editor of book</th>
<th>Title of book/journal</th>
<th>Edition (if different from the first)</th>
<th>Place of publication</th>
<th>Publisher</th>
<th>Year of publication</th>
<th>Journal issue number</th>
<th>Pages</th>
</tr>
</thead>
<tbody>
<tr>
<td>Book</td>
<td></td>
<td></td>
<td></td>
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<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Chapter in the book</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Journal Article</td>
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<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Book (printed, one author)

To be made up of:
- Author/editor (surname followed by initials)
- Title (in italics)
- Edition (only include the edition number if it is not the first edition)
- Place of publication, publisher
- Series and volume number (where relevant)
- Year of publication.

Reference list:

One of the volumes of a multi-volume publication

Reference list:

Book (printed, two or three authors)

To be made up of:
- Author/editor (surname followed by initials)
- Title (in italics)
- Edition (only include the edition number if it is not the first edition)
- Place of publication, publisher
- Series and volume number (where relevant)
- Year of publication.
Reference list:

Chapter in a book (print)
To be made up of:
- Author of the chapter/section (surname followed by initials)
- Title of chapter/section
- In:
- Author/editor (surname followed by initials) of book
- Title of book (in italics)
- Place of publication, publisher
- Year of publication
- Page reference.

Reference list:

Encyclopaedia (entry)
To be made up of:
- Author (if relevant, surname followed by initials)
- Entry title
- In
- Author of Encyclopaedia, Encyclopaedia name (in italics).
- Edition (if relevant).
- Place of publication, publisher.
- Year of publication.
- Page reference.

Reference list:

Journal Article or Newspaper Article

Journal Article

To be made up of:
- Author (surname followed by initials)
- Title of article (in italics)
- Title of journal (between quotation marks – capitalise the first letter of each word in title, except for linking words such as and, of, the, for)
- Year of publication

Newspaper Article

To be made up of:
- Author (surname followed by initials)
- Title of article (in italics)
- Title of newspaper (between quotation marks – capitalise the first letter of each word in title, except for linking words such as and, of, the, for).
- Edition if required
• Issue information, that is, volume and, where applicable, part number, month or season
• Page reference.
• Year of publication
• Day and month.
• Page reference.

Reference list:

**Student’s Own Work**

To be made up of:
• Student name.
• Title of essay/assignment/thesis etc. (in italics).
• Institution.
• Year of submission
• Unpublished essay/assignment/thesis etc.

Reference list:

**Patent**

To be made up of:
• Inventor(s).
• Title (in italics).
• Authorising organisation.
• Patent number.
• Year of publication/Date of granted

Reference list:

**Single Map**

To be made up of:
• Author (if relevant, surname followed by initials)
• Title (in italics)
• Edition (only include the edition number if it is not the first edition)
• Scale
• Place of publication, publisher
• Year of publication.
Reference list:

**Atlas**

To be made up of:
- Author (if relevant, surname followed by initials)
- Title (in italics)
- Edition (only include the edition number if it is not the first edition)
- Place of publication, publisher
- Year of publication.

Reference list:

**Map in an Atlas**

To be made up of:
- Map Author
- Map title [format]
- Scale
- Map date (if different than atlas)
- In:
- Atlas Author
- Atlas title (in italics)
- Edition (only include the edition number if it is not the first edition)
- Place of publication, publisher
- Date
- Page reference.

Reference list:

**Legislation**

To be made up of:
- Document title (document name, approval date, document title)
- Location in place of publication (and subsequent amendments, if any).

Reference list:
### 2.2. Bibliographical notes referring to electronic documents

#### Table 1. List of necessary elements of bibliographical notes referring to electronic documents

<table>
<thead>
<tr>
<th>E-book (from the internet)</th>
<th>To be made up of:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• Author/editor.</td>
</tr>
<tr>
<td></td>
<td>• Title of book (in italics)</td>
</tr>
<tr>
<td></td>
<td>• [online]</td>
</tr>
<tr>
<td></td>
<td>• Year of publication</td>
</tr>
<tr>
<td></td>
<td>• Available at: URL.</td>
</tr>
<tr>
<td></td>
<td>• Accessed: date.</td>
</tr>
</tbody>
</table>

#### Reference list:


---

### Journal Article (online)

#### To be made up of:

- Author (surname followed by initials).
- Title of article (in italics)
- Title of journal (between quotation marks – capitalise the first letter of each word in title, except for linking words such as and, of, the, for)
- [online]
- Year of publication
- Issue information, that is, volume and, where applicable, part number, month or season
- Page reference
- Available at: URL.
- Accessed: date.

#### Reference list:

Online Act

To be made up of:
- Title of the Act and year (if relevant chapter number of the Act; abbreviated to 'c')
- [Online]
- Place of publication, publisher
- Available from: URL
- [Date accessed].

Reference list:

Website

To be made up of:
- Title of website (in italics)
- [online]
- Place of publication, publisher (if relevant)
- Year that the site was published/last updated (if relevant)
- Available at: URL.
- Accessed: date

Reference list:
Creative Commons, [online], USA, Creative Commons Corporation, https://creativecommons.org/, [Accessed: 7.09.2020].

Part of a website

To be made up of:
- Author of the site parts
- Title of the site parts (article)
- In:
- Title of website (in italics)
- [online]
- Place of publication, publisher (if relevant)
- Year that the site was published/last updated (if relevant)
- Available at: URL.
- Accessed: date

Reference list:
WETZLER J., GREEN C., CC Open Education Platform Activities Fund: Six Winners! [In:] Creative Commons, [online], USA, Creative Commons Corporation, 31.08. 2020, https://creativecommons.org/2020/08/31/cc-open-education-platform-activities-fund-six-winners/, [Accessed: 7.09.2020].
3. Abbreviation in bibliographical notes

The cited Standard does not mention the abbreviations found in notes; their use is, however, commonplace. This is why we decided to describe them for those interested:

1. If the work’s author references a document mentioned in the note directly preceding the current one, we use “Ibidem” (Latin abbreviations: ibid., ib.) followed by the page number. If the current note refers to the same page as well, use only “Ibidem”.

   EXAMPLE:
   
   ² Ibidem, p. 35.
   ³ Ibidem.

2. If the author references a document mentioned in one of the previous notes and it is *not* the only document by the cited author referenced in the work, repeat their surname and name (or first name initial), title or beginning of the title, and the respective page number.

   EXAMPLE:
   
   ³ SPRADLEY J.P., *The Ethnographic...*, s. 72.

3. If the author references a document mentioned in one of the previous notes and it is the only document by the cited author referred to in the work, write their surname and name (or just the initial), followed by the abbreviation “op. cit” (opus citatum) or u.s. (ut supro)⁶.

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4. When citing another work by the same author as in the previous note, use the following Latin abbreviations: “Idem” (male author) and “Eadem” (female author).

Example:


3 SPRADLEY J.P., op. cit., s. 56

5. When citing a work cited by another author, the bibliographical description of the original source of the citation is followed by the Latin abbreviation “cit. per”, which is then followed by the bibliographical description of the secondary source through which the original work is cited.

Example:


---

7 *Ibidem,* p. 81.

8 *Ibidem.*
Table 1. List of the most common abbreviations used in notes and references

<table>
<thead>
<tr>
<th>Polish</th>
<th>Latin</th>
<th>Meaning</th>
<th>Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>b.m.</td>
<td>s.l. (sine loco)</td>
<td>without a place</td>
<td>when the document does not mention the place of publication</td>
</tr>
<tr>
<td>b.r.</td>
<td>s.a. (sine anno)</td>
<td>without a year</td>
<td>when the document does not mention the year of publication</td>
</tr>
<tr>
<td>b.w.</td>
<td>s.n. (sine nomine)</td>
<td>without a publisher</td>
<td>when the document does not mention the publisher</td>
</tr>
<tr>
<td>cyt. za</td>
<td>cyt. według</td>
<td>cit. per</td>
<td>quoted after</td>
</tr>
<tr>
<td>dz. cyt.</td>
<td>op. cit. (opus citatum)</td>
<td>quoted work</td>
<td>when we quote the same work another time</td>
</tr>
<tr>
<td>wyd. cyt.</td>
<td></td>
<td>quoted edition</td>
<td></td>
</tr>
<tr>
<td>j.w.</td>
<td>u.s. (ut supro)</td>
<td>as above</td>
<td></td>
</tr>
<tr>
<td>i in.</td>
<td>et al. (et alii) etc.</td>
<td>and others</td>
<td>when a document has more than 3 authors</td>
</tr>
<tr>
<td>kps</td>
<td></td>
<td>computer writing</td>
<td>a work written using a computer</td>
</tr>
<tr>
<td>mps</td>
<td></td>
<td>typescript</td>
<td>a work typewritten work</td>
</tr>
<tr>
<td>rkps</td>
<td></td>
<td>manuscript</td>
<td>a handwritten work</td>
</tr>
<tr>
<td>tamże</td>
<td>ibid. (ibidem)</td>
<td>in an already cited work</td>
<td>when one cites a document already mentioned in the note immediately preceding the current one</td>
</tr>
<tr>
<td>tenże</td>
<td>idem</td>
<td></td>
<td>when citing the same author(s) as in the note immediately preceding the current one</td>
</tr>
<tr>
<td>tychże</td>
<td>eadem</td>
<td></td>
<td></td>
</tr>
<tr>
<td>w</td>
<td>in</td>
<td></td>
<td>an abbreviation preceding the bibliographical description of the source of a given article, chapter or fragment</td>
</tr>
<tr>
<td>właśc.</td>
<td>i.e. (id est)</td>
<td>that is</td>
<td>when, for example, the source contains some kind of error</td>
</tr>
</tbody>
</table>


4. Methods of linking the references contained in the text with notes

The bibliographical notes and descriptions in the citation lists, as well as references⁹ must be provided in an uniform manner throughout the entire work. In other words, it is advisable to link the references contained in the text with the complementary bibliographical details of the cited works or works adduced by the work’s author using one of the following methods:

1) the traditional system (the so-called “string of notes”),
2) the numerical system (Vancouver system),
3) the “name-and-date” system (Harvard system).

⁹ A “reference” is an indication of the corresponding note contained in the text or another form of content. Cit. per: PN-ISO 690: 2012 Information and documentation. Guidelines for bibliographical notes and references to information resources, p. 7
4.1. The traditional system (the so-called “string of notes”),

The numbers in the upper index or brackets (round, square) refer to the notes numbered in the order they appear in within the text. Multiple references referring to the same information resource must be given under separate note numbers. A note may contain more than one source. Notes must be given in a numerical order. They're given at the bottom of the page and separated from the “proper” text using a continuous line. References may also be given at the end of the chapter or the work. They may be bibliographical descriptions or comments pertaining to the contents¹⁰.

A fragment of text containing references¹¹

Ethnography is a mixture of different techniques¹, wherein one gains data from multiple sources. However, information from interviews (including friendly conversation and ethnographic interview) and observations are usually to be found the most important². Here we need to mention two definitions of objects in such fieldwork. First we have to deal with the actor, which is the participant one observes in their natural environment. The second is the informant. Each informant could be an actor, but not necessarily the actor who will be an informant³.

EXAMPLE (notes at the bottom of the page)


BIBLIOGRAPHICAL NOTE LIST = CITATION LIST
(at the end of the work, alphabetical order, positions not numbered)


The MS Word software allows the user to add notes at the bottom of the page or at the end of the work automatically (see below)

¹⁰ Antczak, Nowacka, op. cit., p. 73.
When citing information resources mentioned in previous notes, abbreviations such as “ibid.” are used (see subchapter: “Abbreviations in bibliographical notes”).

If the notes “contain shortened names, it is advisable to explain all such abbreviations in the first note, or indicate a source containing explanations”\(^\text{12}\), e.g.: “The used abbreviations are: ...”; The list of the abbreviations used is found at p. 173”.

Numbers in the upper index or in brackets (round, square) are placed before punctuation characters (e.g. full stops, commas), except for quotation marks, brackets, question marks, and exclamation marks\(^\text{13}\). An exception exists for situations when the final element of a sentence or a longer text the note refers to is an abbreviation featuring a point\(^\text{14}\), e.g. “etc.\(^\text{21}\)”

**EXAMPLES**

Use of upper-index numbers referring to notes

1. The aim of research is learning that permits effective action\(^2\).
2. “The aim of research is learning that permits effective action”\(^2\).
3. ...(The aim of research is learning that permits effective action)\(^2\).
4. Is the aim of research learning that permits effective action? \(^2\)
5. The aim of research is learning that permits effective action! \(^2\)
6. The aim of research is learning that permits effective action... \(^2\)
7. The aim of research is learning that permits effective action \(^2\), while...
8. The aim of research is learning that permits effective action etc.\(^\text{2}\) On the other hand...
9. The aim of research\(^1\) is learning that permits effective action\(^2\).

In points 1-8, the note refers to a sentence or a longer text. In point 9, the first note refers to the word “research”, with the second note referring to the entire sentence.

\(^{14}\) Ibidem, p. 618.
4.2. The numerical system (Vancouver system)

The numbers placed in the upper index or in brackets (round, square) refer to information resources in the order they appear in the work. Further references to the same source receive the same number as the first instance. If multiple parts of a document are cited, page numbers may be given following the position numbers. The notes are arranged in a numbered list according to the order they appear in. This system is commonly used e.g. in publications related to medical sciences.

Text fragment with references

Ethnography is a mixture of different techniques [5, p.157], wherein one gains data from multiple sources. However, information from interviews (including friendly conversation and ethnographic interview) and observations are usually to be found the most important [2, p.2]. Here we need to mention two definitions of objects in such fieldwork. First we have to deal with the actor, which is the participant one observes in their natural environment. The second is the informant. Each informant could be an actor, but not necessarily the actor who will be an informant [4, p.32]

BIBLIOGRAPHICAL NOTE LIST = CITATION LIST
(at the end of the work, arranged in the order they appear in)

1. ....
3. ........
4.3. The “name-and-date” system (Harvard system)

In the “name-and-date” system, the author’s name and the publishing year of the cited resource are given (e.g. Fielding, 1993), possibly with page numbers if a quote is made, e.g. (Spradley, 1979, p. 134). If the author’s name appears as a natural element of the text, only the year and possibly pages are given in the brackets, e.g. (2001, p. 134).

For documents authored by more than two people, the reference may be shortened, giving only the name of the first author followed by “et al.”, e.g. (Kowalski et al., 1999, p. 172). Care should be taken to ensure that the abbreviated form do not disturb the reference’s conformity with the citation list.

If two or more documents were authored by the same person and were published in the same year, they are differentiated by following the publication year with a letter (a, b, c etc.) both in the reference and in the list of bibliographical notes, e.g. (Wysocki, 2007a); (Wysocki 2007b, p. 58).

Notes referring to the resources cited in the text are arranged alphabetically by the authors’ names, then according to the publication year and the following letter (if present), given immediately after the author’s name.

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Text fragment with references

Ethnography is a mixture of different techniques (Fielding, 1993, p.157), wherein one gains data from multiple sources. However, information from interviews (including friendly conversation and ethnographic interview) and observations are usually to be found the most important (Hammersley, 1990b, p.2). Here we need to mention two definitions of objects in such fieldwork. First we have to deal with the actor, which is the participant one observes in their natural environment. The second is the informant. Each informant could be an actor, but not necessarily the actor who will be an informant (Spradley, 1979, p.32).

BIBLIOGRAPHICAL NOTE LIST = CITATION LIST
(at the end of the work, alphabetical order, positions not numbered, full description, with the year of publication given at the beginning, following the author’s name)


5. Citation list

A citation list is the bibliography attached to a given work, registering the documents cited and/or used by the work’s author, or merely associated with the work’s topic. Alternatively, the citation list may be called: “literature of the subject”, “written sources”, “literature index”, “literature list”, “list of written sources”, “list of sources”, “list of sources and literature”, “sources and literature”, or simply “bibliography”.

The citation list must be included after the main body of text and supplemental materials (annexes, notes), but before any and all informational and auxiliary materials that may appear (dictionary of terms, indices, lists, table of contents, etc.). A citation list may be included after the respective chapters.

Four bibliography examples are given below:

**EXAMPLE 1**

A BIBLIOGRAPHY arranged in the alphabetical order, positions not numbered

This kind of bibliography may be used with the traditional system, the so-called string of notes
(see subchapter 4.1.)


---


EXAMPLE 2

A BIBLIOGRAPHY arranged according to the form of publishing, with arranged alphabetically within the respective form categories, positions numbered. This kind of bibliography may be used with the traditional system, the so-called string of notes (see subchapter 4.1.)

PRINTED DOCUMENTS

ELECTRONIC DOCUMENTS
3. WETZLER J., GREEN C., CC Open Education Platform Activities Fund: Six Winners! [In:] Creative Commons, [online], USA, Creative Commons Corporation, 31.08. 2020, https://creativecommons.org/2020/08/31/cc-open-education-platform-activities-fund-six-winners/, [Accessed: 07/09/2020].
EXAMPLE 3

BIBLIOGRAPHY = citation list, positions arranged in the order they appear in

This type of bibliography is used with the numerical system (Vancouver system)

(see subchapter 4.2.)

1. WETZLER J., GREEN C., CC Open Education Platform Activities Fund: Six Winners! [In:] Creative Commons, [online], USA, Creative Commons Corporation, 31.08. 2020, https://creativecommons.org/2020/08/31/cc-open-education-platform-activities-fund-six-winners/, [Accessed: 07/09/2020].


EXAMPLE 4

A BIBLIOGRAPHY arranged alphabetically, with the date of publication following the first element of the description, positions not numbered

This type of bibliography is used with the “name-and-date” system (Harvard system)

(see subchapter 4.3.)


WETZLER J., GREEN C., 2020, CC Open Education Platform Activities Fund: Six Winners! [In:] Creative Commons, [online], USA, Creative Commons Corporation, https://creativecommons.org/2020/08/31/cc-open-education-platform-activities-fund-six-winners/, [Accessed: 07/09/2020].


By: Bożena Sowińska