



# HBS Citation Guide

2023–24 ACADEMIC YEAR

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[If you have any comments about this guide, contact \[fhasan@hbs.edu\]\(mailto:fhasan@hbs.edu\).](mailto:fhasan@hbs.edu)

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# Citation Conventions

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## ABOUT THIS GUIDE

This guide describes citation conventions that HBS students can use when writing research papers. For information about citing materials not covered in this guide, please contact [fhasan@hbs.edu](mailto:fhasan@hbs.edu)

## PURPOSE OF CITATIONS

There are three main reasons to include citations in your papers:

- To give credit to the authors of the source materials you used when writing the paper.
- To enable readers to follow up on the source materials.
- To demonstrate that your paper is well-researched.

There are many ways to document your research. The following guidelines, based on *The Chicago Manual of Style*, present one style. Whichever style you choose, it is important to follow a format that is clear and consistent.

## WHAT TO CITE

You should cite all direct quotations, paraphrased factual statements, and borrowed ideas. The only items you don't need to cite are facts that are common knowledge, such as the year of the first U.S. stock market crash. However, if you present facts in someone else's words, you should cite the source of those words. In addition, if you paraphrase large amounts of information from one source, you should cite that source, as emphasized in the following guidelines from sourcing expert Gordon Harvey:

When you draw a *great deal* of information from a *single* source, you should cite that source even if the information is common knowledge, since the source (and its particular way of organizing the information) has made a significant contribution to your paper.<sup>1</sup>

Failure to give credit to the words and ideas of another author is plagiarism. Most people don't intend to commit plagiarism, but may do so inadvertently because they are in a hurry or because of sloppy work habits. For tips on how to avoid plagiarism, see the following resources:

"Citing Sources & Plagiarism" on the HBS MBA website,  
<https://inside.hbs.edu/departments/mba/support/default.aspx?page=proper-citation>

"Avoiding Plagiarism," *Harvard Guide to Using Sources*, Harvard College Writing Program, <https://usingsources.fas.harvard.edu/avoiding-plagiarism>

"What is Common Knowledge," Academic Integrity at MIT: A Handbook for Students,  
<https://integrity.mit.edu/handbook/citing-your-sources/what-common-knowledge>

## TYPES OF CITATIONS: FOOTNOTES, SOURCE LINES, AND BIBLIOGRAPHIES

Citations can appear in three main forms: footnotes (or endnotes), source lines, and bibliographies. Each form contains similar information arranged in different ways. The following sections provide details about each form.

### FOOTNOTES AND ENDNOTES

Footnotes and endnotes have the same function—to cite the exact page of a source you refer to in your paper. The only difference between footnotes and endnotes is placement: footnotes appear at the bottom of the page, whereas endnotes appear at the end of the document.

The main characteristics of footnotes and endnotes are as follows:

- They are preceded by a number.
- The author's name is in natural order.
- The elements of the citation are separated by commas.

The following examples show a quotation and its corresponding footnote or endnote:

#### Quotation cited in text

Sahlman says, “Taking advantage of arbitrage opportunities is a viable and potentially profitable way to enter a business.”<sup>32</sup>

#### Corresponding footnote or endnote

<sup>32</sup> William A. Sahlman, “How to Write a Great Business Plan,” *Harvard Business Review* 75 (July–August 1997), 103.

### SOURCE LINES

Source lines typically appear under charts, exhibits, figures, tables, and other graphical items. Source lines should acknowledge the source of the graphic or the data that was used to create it. A source line begins with the word *Source* and continues with the same information that would appear in a footnote or endnote.

The following are some examples of source lines:

**Source:** Jon F. Thompson, *Cycle World*, vol. 35, no. 6 (June 2012), p. 23.

**Source:** Semiconductor Industry Association, “Worldwide Semiconductor Shipments,” [http://www.sia-online.org/downloads/ww\\_shipments.pdf](http://www.sia-online.org/downloads/ww_shipments.pdf), accessed August 2013.

**Source:** Casewriter’s diagram based on Rhythms NetConnections, Inc. price data for April 30, 2014 through April 30, 2015, via Refinitiv/Datastream, accessed November 2015.

**Source:** Compiled from Bloomberg LP, LexisNexis, and SEC filings data, May 2015.

### BIBLIOGRAPHIES

A bibliography lists all of the sources you used to create a research paper. The bibliography appears at the end of the paper, after the endnotes (if any).

#### Should You Include a Bibliography?

If you have included complete footnotes (or endnotes) and source lines in your paper, then you do not need to include a bibliography unless your professor has requested one, or unless you want to provide a summary of the sources you used to write your paper.

### Formatting a Bibliography

Bibliographies have the following formatting conventions:

- The first author's name is inverted (last name first), and most elements are separated by periods.
- Entries are arranged alphabetically by the author's last name, or by the first word of the title if no author is listed.
- Entries have a special indentation style (*hanging indent*) in which all lines but the first are indented.

### Examples of Bibliography Entries

The following are examples of bibliography entries:

Anik, Lalin, and Michael I. Norton. "Matchmaking Promotes Happiness." *Social Psychological & Personality Science* 5, no. 6 (August 2014): 644-652.

Christensen, Clayton M. *The Innovator's Dilemma: When New Technologies Cause Great Firms to Fail*. Boston: Harvard Business School Press, 1997.

Mayo, Anthony, and Mark Benson. "Bill Gates and Steve Jobs." HBS No. 407-028 (Boston: Harvard Business School Publishing, 2010).

### REPEATING A CITATION

After the first complete citation of a work, you may abbreviate subsequent instances by using either *Ibid.* or a shortened form of the citation.

#### **Ibid.**

Use *Ibid.* to repeat a citation that appears immediately after the original one. *Ibid.* takes the place of the author's name, the title of the work, and as much of the subsequent information as is identical. For example:

<sup>50</sup> Thomas Smith, "New Debate over Business Records," *New York Times*, December 31, 1978, sec. 3, p. 5.

<sup>51</sup> *Ibid.*, p. 6.

If you are planning to rearrange your footnotes or endnotes later on, it's a good idea to use the shortened citation form rather than *Ibid.*

#### **Shortened Citation Form**

Use the shortened citation form to a repeat citation that is after, but not contiguous to, the current one. This form is preferable to *Ibid.* for citations that you intend to rearrange later.

The shortened citation should include enough information to help readers identify the source— i.e., the last name of the author; enough of the title to be clear; and the page number, if different from the first. For example:

<sup>1</sup> David Hounshell, *From the American System to Mass Production, 1800–1932* (Baltimore: Johns Hopkins University Press, 1984), p. 221.

<sup>2</sup> [Citation of different source]

<sup>3</sup> Hounshell, *From the American System*, p. 119.

## CREATING NEW CITATION STYLES

If you can't find an example of the type of source material you want to cite, and if you've exhausted other resources (including *The Chicago Manual of Style* and fhasan@hbs.edu), then just cite all of the details that would help readers find the source easily. Think about the four “W”s: WHO created the work, WHAT is the title and type of information, WHEN was it published, and WHERE can readers find it?

The following examples show citations that were created without templates but are precise and easy to follow:

Author's email survey of students from MBA class of 2013, November 16, 2012, Harvard Business School, Boston, MA.

Clarence Saunders, “Documentary Evidence about Piggly Wiggly,” Harvard pre-1920 social history/ business preservation microfilm project, available from Historical Collections, Baker Library, Harvard Business School, Microfilm HD Box #136.

Caroline J. Ferguson and Barbara A. Schaal, “Phylogeography of *Phlox pilosa* subsp. *ozarkana*,” poster presented at the 16th International Botanical Congress, St. Louis, 1999.<sup>2</sup>

When you're citing unusual source materials, don't be too concerned about following a particular format; instead, just include all of the details that would help readers locate the information quickly. (It's usually better to provide too much rather than too little information.)

## PERMISSION REQUIREMENTS

If you plan to publish your paper or distribute it beyond your classroom (e.g., on the Web), and if the paper contains the following kinds of information, then you might need permission from the copyright holder:

- Graphical items (charts, graphs, maps, photographs, tables, etc.)
- Entire documents or articles
- Excerpts of text or data that are greater than 10% of the original

Be sure to check the copyright holder's permission requirements before redistributing any of their information outside the classroom. The copyright holder might be a person, an organization, or even a state or national government.

# Examples of Citations

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This section shows examples for the most common types of source materials. For information about citing other materials, see *Creating New Citation Styles* on p. 8, or contact fhasan@hbs.edu.

A few notes:

**ACCESS DATES** – For brevity, access dates for URLs show only the month and year (e.g., June 2012). However, if you’re citing information that pertains to a time-sensitive field such as law or medicine, then it makes sense to include a complete access date.

**CAPITALIZATION** – Titles in citations are capitalized exactly as they appear in the source documents. For example, under *Analyst Reports*, the first two examples use sentence-style capitalization, whereas the next two examples use headline style. These styles reflect the capitalization style of the original documents.

When all-caps appear in the title of a source document only for the sake of design (and not for any substantive reason), they should be converted to headline-style caps in the citation. For details on headline-style capitalization, see *The Chicago Manual of Style*.

**FOOTNOTE VS. BIBLIOGRAPHY FORMAT** – Most examples appear in both footnote and bibliography format. Although your paper will probably require citations in footnote format only, the bibliography format is shown in case your professor wants you to include a bibliography.

These examples are based on the “Notes and Bibliography” style described in *The Chicago Manual of Style*. That manual also describes the “Author-Date” style, which is preferred by some publishers. For descriptions of each style, see *The Chicago Manual of Style*.

**URLs** – In the examples, some URLs have been replaced by [URL]. In your paper, you should replace [URL] with the actual URL, or with a shortened URL if space is limited.

## ADVERTISEMENTS

### On the Web<sup>4</sup>

#### Footnote

<sup>1</sup> Volkswagen of America, Inc., “Crazy Guy,” television advertisement (Arnold Communications, Inc., directed by Phil Morrison), 2000, [URL], accessed August 2002.

#### Bibliography

Volkswagen of America, Inc. “Crazy Guy.” Television advertisement. Arnold Communications, Inc., directed by Phil Morrison, 2000. [URL], accessed August 2002.

## **ANALYST REPORTS**

### **Signed (on the Web)**

#### **Footnote**

<sup>1</sup> Steve Weinstein, “High growth in search creates opportunities for niche players,” Pacific Crest Securities, November 4, 2003, p. 11, [URL], accessed December 2008.

#### **Bibliography**

Weinstein, Steve. “High growth in search creates opportunities for niche players.” Pacific Crest Securities, November 4, 2003. [URL], accessed December 2008.

### **Unsigned**

#### **Footnote**

<sup>2</sup> Wachovia Capital Markets, LLC, “Perspectives on the U.S. Restaurant Industry,” August 20, 2007.

### **Unsigned (via database)**

#### **Footnote**

<sup>3</sup> Wachovia Capital Markets, LLC, “Perspectives on the U.S. Restaurant Industry,” August 20, 2007, via Refinitiv/AMR, accessed September 2009.

## **ANNUAL REPORTS (PRINTED)**

#### **Footnote**

<sup>4</sup> General Motors, 2001 Annual Report (Detroit: General Motors, 2002), p. 34.

#### **Bibliography**

General Motors. 2001 Annual Report. Detroit: General Motors, 2002.

**NOTE:** Publication details, such as the location and name of the publisher, are optional in citations of annual reports—e.g., the following format is also fine: General Motors, 2001 Annual Report.

## **ANNUAL REPORTS (ONLINE)**

### **On the Web**

#### **Footnote**

<sup>5</sup> General Motors, 2010 Annual Report, p. 118, [URL], accessed October 2011.

#### **Bibliography**

General Motors. 2010 Annual Report. [URL], accessed October 2011.

## On the Web (via database)

### Footnote

<sup>1</sup> General Motors, 2010 Annual Report, p. 58, via Refinitiv/AMR, accessed [month/year].

### Bibliography

General Motors. 2010 Annual Report. Refinitiv/AMR, accessed [m/y].

## ARTICLES

See *Newspapers (Printed)*; *Periodicals (Printed)*

## BLOGS

In the first example below, “blog” is in parentheses because it is not part of the blog title. In the second example, “blog” is italicized and capitalized because it is part of the blog title.

### Blog post

#### Footnote

<sup>7</sup> Bruce Buschel, “Running a Restaurant Is No Joke,” *You’re the Boss* (blog), *New York Times*, August 25, 2011, [URL], accessed September 2013.

#### Footnote

<sup>8</sup> Leonard Gilroy, “Indiana Toll Road Concessionaire on Investing Local, Hiring Local,” *Out of Control Policy Blog*, Reason Foundation, January 4, 2010, [URL], accessed July 2013.

### Comment on blog post

#### Footnote

<sup>2</sup> Kris, August 26, 2011 (9:37 a.m.), comment on Bruce Buschel, “Running a Restaurant Is No Joke,” *You’re the Boss* (blog), *New York Times*, August 25, 2011, [URL], accessed September 2013.

## BOND PROSPECTUSES

### Footnote

<sup>8</sup> Formula One Finance B.V., August 1999 prospectus for US\$1.4 billion of 100% Secured Floating Rate Notes, due 2010.

## **Bibliography**

Formula One Finance B.V. August 1999 prospectus for US\$1.4 billion of 100% Secured Floating Rate Notes, due 2010.

## **BOOKS (PRINTED)**

### **One author**

#### **Footnote**

<sup>9</sup> William W. George, *Seven Lessons for Leading in Crisis* (San Francisco, CA: Jossey-Bass, 2009), p. 29.

#### **Bibliography**

George, William W. *Seven Lessons for Leading in Crisis*. San Francisco, CA: Jossey-Bass, 2009.

### **Two authors**

#### **Footnote**

<sup>2</sup> Dorothy Leonard and Walter Swap, *Deep Smarts: How to Cultivate and Transfer Business Wisdom* (Boston: Harvard Business School Press, 2005), p. 27.

#### **Bibliography**

Leonard, Dorothy, and Walter Swap. *Deep Smarts: How to Cultivate and Transfer Business Wisdom*. Boston: Harvard Business School Press, 2005.

### **Three authors**

#### **Footnote**

<sup>20</sup> Jeffrey H. Dyer, Hal B. Gregersen, and Clayton M. Christensen, *The Innovator's DNA: Mastering the Five Skills of Disruptive Innovators* (Boston: Harvard Business School Press, 2011), p. 138.

#### **Bibliography**

Dyer, Jeffrey H., Hal B. Gregersen, and Clayton M. Christensen. *The Innovator's DNA: Mastering the Five Skills of Disruptive Innovators*. Boston: Harvard Business School Press, 2011.

### **More than three authors**

#### **Footnote**

<sup>18</sup> C. Roland Christensen et al., *Business Policy: Text and Cases*, 5th ed. (Homewood, IL: Richard D. Irwin, Inc., 1982), p. 101.

## **Bibliography**

Christensen, C. Roland, et al. *Business Policy: Text and Cases*. 5th ed. Homewood, IL: Richard D. Irwin, Inc., 1982.

## **Editor**

### **Footnote**

<sup>19</sup> Rohit Deshpandé, ed., *Using Market Knowledge* (Thousand Oaks, CA: Sage Publications, 2000), p. 89.

### **Bibliography**

Deshpandé, Rohit, ed. *Using Market Knowledge*. Thousand Oaks, CA: Sage Publications, 2000.

## **Multiple editors**

### **Footnote**

<sup>20</sup> David A. Garvin, C. R. Christensen, and A. Sweet, eds., *Education for Judgment: The Artistry of Discussion Leadership* (Boston: Harvard Business School Press, 1991).

### **Bibliography**

Garvin, David A., C. R. Christensen, and A. Sweet, eds. *Education for Judgment: The Artistry of Discussion Leadership*. Boston: Harvard Business School Press, 1991.

## **Corporate author (organization, association, or corporation)**

### **Footnote**

<sup>21</sup> World Health Organization, *WHO Editorial Style Manual* (Geneva: World Health Organization, 1993).

### **Bibliography**

World Health Organization. *WHO Editorial Style Manual*. Geneva: World Health Organization, 1993.<sup>5</sup>

## **Edition**

### **Footnote**

<sup>22</sup> Anthony A. Atkinson, Robert S. Kaplan, Ella Mae Matsumura, and S. Mark Young, *Management Accounting*, 5<sup>th</sup> ed. (Upper Saddle River, NJ: Pearson Prentice Hall, 2007).

### **Bibliography**

Atkinson, Anthony A., Robert S. Kaplan, Ella Mae Matsumura, and S. Mark Young. *Management Accounting*. 5<sup>th</sup> ed. Upper Saddle River, NJ: Pearson Prentice Hall, 2007.

## Chapters or other titled parts of a book

### Footnote

<sup>4</sup> R. S. Tedlow, “The Fourth Phase of Marketing: The History of Marketing and the Business World Today,” in *The Rise and Fall of Mass Marketing*, edited by G. Jones and R. S. Tedlow (London: Routledge, 1993), p. 81.

### Bibliography

Tedlow, R. S. “The Fourth Phase of Marketing: The History of Marketing and the Business World Today.” In *The Rise and Fall of Mass Marketing*, edited by G. Jones and R. S. Tedlow. London: Routledge, 1993.

### Footnote

<sup>6</sup> Kevin Murphy, “Executive Compensation: Where We Are and How We Got There,” in *Handbook of the Economics of Finance*, eds. George Constantinides, Milton Harris, and René Stulz (North Holland: Elsevier Science, 2012), p. 97.

### Bibliography

Murphy, Kevin. “Executive Compensation: Where We Are and How We Got There.” In *Handbook of the Economics of Finance*, eds. George Constantinides, Milton Harris, and René Stulz. North Holland: Elsevier Science, 2012.

## BOOKS (ONLINE)

See *E-Books*.

## BROCHURES

According to *The Chicago Manual of Style*, “pamphlets, corporate reports, brochures, and other freestanding publications are treated essentially as books.”<sup>6</sup>

### Signed

#### Footnote

<sup>3</sup> *Mary Cassatt: Modern Woman*, ed. Judith A. Barter (Chicago: Art Institute of Chicago, 1998), p. 7.

#### Bibliography

Barter, Judith A., ed. *Mary Cassatt: Modern Woman*. Chicago: Art Institute of Chicago, 1998.

### Unsigned

#### Footnote

<sup>6</sup> *Reinventing Software*, IBM corporate brochure (White Plains, NY, December 2002), p. 3.

### **Bibliography**

*Reinventing Software*. IBM corporate brochure. White Plains, NY, December 2002.

### **Footnote**

<sup>12</sup> *Altera Corporate Overview*, Altera, <http://www.altera.com/corporate/overview/ovr-index.html>, accessed October 2003.

<sup>13</sup> *Altera, Altera Corporate Overview*, <http://www.altera.com/corporate/overview/ovr-index.html>, accessed October 2003.

### **Bibliography**

*Altera Corporate Overview*. Altera <http://www.altera.com/corporate/overview/ovr-index.html>, accessed October 2003.

## **CASES (PRINTED)**

### **Printed**

#### **Footnote**

<sup>13</sup> Mikołaj Jan Piskorski and David Chen, “Twitter,” HBS No. 710-455 (Boston: Harvard Business School Publishing, 2010), p. 8.

#### **Bibliography**

Piskorski, Mikołaj Jan, and David Chen. “Twitter.” HBS No. 710-455. Boston: Harvard Business School Publishing, 2010.

## **CASES (ONLINE)**

### **On the Web**

#### **Footnote**

<sup>14</sup> Amy C. Edmondson and Laura R. Feldman, “Group Process in the Challenger Launch Decision (A),” HBS No. 603-068 (Boston: Harvard Business School Publishing, 2002), <http://hbsp.harvard.edu>, accessed October 2012.

#### **Bibliography**

Edmondson, Amy C., and Laura R. Feldman. “Group Process in the Challenger Launch Decision (A).” HBS No. 603-068. Boston: Harvard Business School Publishing, 2002. <http://hbsp.harvard.edu>, accessed September 2007.

### **Footnote**

<sup>15</sup> Michael J. Enright et al., “Daewoo and the Korean Chaebol,” University of Hong Kong case no. HKU143 (University of Hong Kong, August 2001), via Harvard Business Publishing, <http://hbsp.harvard.edu/>, accessed March 2007.

### **Bibliography**

Enright, Michael J., et al. “Daewoo and the Korean Chaebol.” University of Hong Kong case no. HKU143 (University of Hong Kong, August 2001). Harvard Business Publishing. <http://hbsp.harvard.edu/>, accessed March 2007.

## **CHARTS**

When citing a chart, illustration, or other graphical item, use the same style that is used to cite tables. See *Tables*.

## **CITATION WITHIN A CITATION**

See *Secondary Sources*.

## **CLASSROOM DISCUSSIONS**

### **Footnote**

<sup>1</sup> Michael J. Roberts, “The Entrepreneurial Manager,” MBA class discussion, September 29, 2001, Harvard Business School, Boston, MA.

### **Bibliography**

Roberts, Michael J. “The Entrepreneurial Manager.” MBA class discussion, September 29, 2001. Harvard Business School, Boston, MA.

## **COMPILED INFORMATION**

The way you create a graphical item like a chart, exhibit, or table determines how you should word the source line for it. The following examples show source lines that vary according to how the item was created.

### **Item copied directly from a single source**

Source: [Citation of SOURCE—e.g., author, title, publisher, date, etc.]

### **Item compiled from multiple sources**

Source: Compiled from [SOURCE 1], [SOURCE 2], and [SOURCE 3].

**Item compiled from multiple sources, including the author's own calculations**

Source: Compiled from [SOURCE 1], [SOURCE 2], and author's calculations.

**Item in format created by the author, but based on data from multiple sources**

Source: Author, based on data from [SOURCE 1], [SOURCE 2], and [SOURCE 3].

See also *Tables*.

## **CONFERENCE PAPERS**

### **Published (in printed form)**

#### **Footnote**

<sup>16</sup> J. Wiklund, F. Delmar, and K. Sjöberg, "Selection of the Fittest? How Human Capital Affects High-Potential Entrepreneurship," in *Proceedings of the Academy of Management 2004 Conference*, New Orleans, LA, August 6–11, 2004, pp. 246–250.

#### **Bibliography**

Wiklund, J., F. Delmar, and K. Sjöberg. "Selection of the Fittest? How Human Capital Affects High-Potential Entrepreneurship." In *Proceedings of the Academy of Management 2004 Conference*. New Orleans, LA, August 6–11, 2004.

### **Published (in online form)**

#### **Footnote**

<sup>17</sup> Mark T. Leary and Michael R. Roberts, "Do Firms Rebalance Their Capital Structures?" June 7, 2004, 14th Annual Utah Winter Finance Conference; Tuck Contemporary Corporate Finance Issues III Conference Paper, SSRN, <http://ssrn.com/abstract=571002>, accessed October 2005.

#### **Bibliography**

Leary, Mark T., and Roberts, Michael R. "Do Firms Rebalance Their Capital Structures?" June 7, 2004, 14th Annual Utah Winter Finance Conference; Tuck Contemporary Corporate Finance Issues III Conference Paper. SSRN, <http://ssrn.com/abstract=571002>, accessed September 2007.

### **Unpublished**

#### **Footnote**

<sup>18</sup> Sarah Dodd, "Transnational Differences in Entrepreneurial Networks," paper presented at the Eighth Global Entrepreneurship Research Conference, INSEAD, Fontainebleau, France, June 1998.

## **Bibliography**

Dodd, Sarah. "Transnational Differences in Entrepreneurial Networks." Paper presented at the Eighth Global Entrepreneurship Research Conference, INSEAD, Fontainebleau, France, June 1998.

## **DATABASES**

To cite information you found in a database, see *Citations of Commercial Databases* on p. 41.

## **DOWNLOADED DOCUMENTS**

### **Footnote**

<sup>19</sup> National Venture Capital Association, "Venture Capital 101" (PDF file), downloaded from NVCA website, [URL], accessed August 19, 2009.

## **E-BOOKS**

To cite an e-book, include the same information you would include when citing the printed version but change the publication date (if needed) and add the format or type of e-reader. In addition, include the URL if you read the e-book on the Web.

**NOTE:** The following examples are shown in footnote format only.

### **CD-ROM**

<sup>1</sup> *Oxford English Dictionary*, 2nd ed., version 4.10, CD-ROM (Oxford: Oxford University Press, 2009), p. 157.

**NOTE:** If there are no page numbers, it's fine to cite a chapter number, section name, or whatever type of locator is used in the book.

### **Kindle**

<sup>3</sup> Marshall Phelps and David Kline, *Burning the Ships: Intellectual Property and the Transformation of Microsoft* (New York: John Wiley & Sons, 2009), Amazon Kindle, loc. 301.

### **Kobo**

<sup>3</sup> Marshall Phelps and David Kline, *Burning the Ships: Intellectual Property and the Transformation of Microsoft* (New York: John Wiley & Sons, 2009), Kobo Aura, [location of information in the book].

## **Nook**

<sup>5</sup> Marshall Phelps and David Kline, *Burning the Ships: Intellectual Property and the Transformation of Microsoft* (New York: John Wiley & Sons, 2009), Barnes & Noble Nook, [location of information in the book].

## **PDF E-book**

<sup>6</sup> Marshall Phelps and David Kline, *Burning the Ships: Intellectual Property and the Transformation of Microsoft* (New York: John Wiley & Sons, 2009), PDF e-book, [page number], [URL], accessed August 2011.

## **EMAIL**

### **Footnote**

<sup>1</sup> Sender's Name, "Subject," email message to Recipient's Name, Date.

**NOTE:** *The Chicago Manual of Style* says the following about email addresses in citations: "An email address belonging to an individual should be omitted. Should it be needed in a specific context, it must be cited only with the permission of its owner."<sup>7</sup>

## **FACEBOOK**

The following examples are shown in footnote format only.

### **Generic example**

<sup>1</sup> Username or Group Name, "First few words of post," Facebook, Date, Time, URL, [access date].

### **Specific examples**

<sup>2</sup> BBC Business News, "Tech giant Apple launches a cheaper iPhone..." Facebook, September 10, 2013, 6:49 p.m., <https://www.facebook.com/bbcbusiness/posts/10151661999718129>, accessed July 2013.

<sup>3</sup> Academy of Medical-Surgical Nurses, "The 2011 AMSN Convention is coming up September 8–11 in Boston," Facebook, April 6, 2011, 5:48 p.m., <https://www.facebook.com/MedSurgNurses/posts/152911501439661>, accessed September 2013.

### **Comment on Facebook post**

<sup>6</sup> Kebs Jr. Kamara, "Please Don't Allow Nokia to Go Away..." September 3, 2012, 8:18 a.m., comment on BBC Business News, "We take a look at Nokia shares..." Facebook post, September 3, 2013, [URL], accessed September 2013.

## FILMS

See *Movies; Videos and Multimedia; Webcasts*.

## Generative AI Citation Format & Examples

Students should consider the use of Chat-GPT and similar technologies the same as using the internet, and therefore follow the same school guidance regarding its usage.

Students should also review and adhere to the School's [Generative AI Responsible Use Guidelines](#).

### Verbatim Response Text with Prompt

When Chat-GPT is allowed, indicate any verbatim use of its results with quotation marks and list any prompts used to generate the content, followed by a footnote. These citation practices are in keeping with our general requirement that students' answers be their own work unless stated otherwise and properly credit the sources used.

Note: If the quotation exceeds five or more lines, they should be blocked. To offset the block quote, indent the entire quotation and remove quotes.

#### Footnote Format:

<sup>1</sup>Text generated by Chat platform or author, Chat program, Month Day, Year, URL.

#### Example A:

When posed with the question, "What is the history of the bond market?" Chat-GPT explains,

The bond market has a long history, dating back to the early 1600s when the Dutch East India Company issued bonds to raise capital for its voyages to Asia. Over the centuries, bonds have evolved into a sophisticated financial instrument and an important component of global financial markets. Today, bonds are widely traded around the world and are used by governments, corporations, and other entities to raise capital and finance their operations.

#### Example A Footnote:

<sup>1</sup> Text generated by ChatGPT, OpenAI, February 8, 2023, <https://chat.openai.com/chat>.

#### Example B:

When prompted with the patent question, "What is prior art?" Claude provides the following definition:

Prior art refers to all information that has been made available to the public in any form before a given date that might be relevant to a patent's claims of novelty and non-obviousness. This includes patents, publications, products, and other disclosures that would have been known or accessible to a person having ordinary skill in the relevant field. Prior art is used to determine the eligibility of a patent application, as an invention must be novel and non-obvious in light of prior art.

**Example B Footnote:**

<sup>1</sup> Text generated by Claude, Anthropic, July 7, 2023, <https://claude.ai/chats>.

**Verbatim response text – prompt not included:**

If you have not included the prompt in the body of your work, include the prompt in the footnote as follows.

**Footnote Format:**

<sup>1</sup> Chat platform or author, response to “Prompt,” Chat program, Month Day, Year.

**Example C:**

Chat-GPT outlines:

The bond market has a long history, dating back to the early 1600s when the Dutch East India Company issued bonds to raise capital for its voyages to Asia. Over the centuries, bonds have evolved into a sophisticated financial instrument and an important component of global financial markets. Today, bonds are widely traded around the world and are used by governments, corporations, and other entities to raise capital and finance their operations.

**Example C Footnote:**

<sup>1</sup> ChatGPT, response to “What is the history of the bond market?” OpenAI, February 8, 2023.

**Edited response:**

If you have used a generative AI tool for your research and you edited the response in your work, indicate with a note within the footnote.

**Footnote Format:**

<sup>1</sup> Text generated by Chat platform or author, Chat program, Month Day, Year, URL.  
Edited for style and content.

**Example D:**

When prompted with the patent question, “What is prior art?” Claude provides the following definition:

“Prior art refers to all information that has been made public before a given date that might be relevant to a patent's claims of novelty and non-obviousness. This includes patents, publications, products, and other disclosures.... Prior art is used to determine the eligibility of a patent application, as an invention must be novel and not obvious.”

**Example D Footnote:**

<sup>1</sup> Text generated by Claude, Anthropic, July 7, 2023, <https://claude.ai/chats>. Edited for style and content.

## GOVERNMENT DOCUMENTS

The following are some examples of citations for government documents. For more examples, see the information about public documents in *The Chicago Manual of Style*, 15th and 16th editions.

### Congressional bills<sup>8</sup>

#### Footnote

<sup>7</sup> Food Security Act of 1985, HR 2100, 99th Cong., 1st sess., *Congressional Record* 131, no. 132, daily ed. (October 8, 1985): H 8461.

#### Bibliography

U.S. Congress. House. Food Security Act of 1985. HR 2100. 99th Cong., 1st sess. *Congressional Record* 131, no. 132, daily ed. (October 8, 1985): H 8353-8486.

### Congressional hearings, published<sup>9</sup>

#### Footnote

<sup>9</sup> House Committee on Banking and Currency, *Bretton Woods Agreements Act: Hearings on HR 3314*, 79th Cong., 1st sess., 1945, 12–14.

### Congressional hearings, unpublished<sup>10</sup>

#### Footnote

<sup>8</sup> Senate Committee on Foreign Relations, *Famine in Africa: Hearing before the Committee on Foreign Relations*, 99th Cong., 1st sess., January 17, 1985.

#### Bibliography

U.S. Congress. Senate. Committee on Foreign Relations. *Famine in Africa: Hearing before the Committee on Foreign Relations*. 99th Cong., 1st sess., January 17, 1985.

### Report for a public hearing

#### Footnote

<sup>10</sup> Office of Massachusetts Attorney General Martha Coakley, “Examination of Health Care Cost Trends and Cost Drivers,” *Report for Annual Public Hearing Under G.L.C. 118g, § 6½(b)*, June 22, 2011 (Boston, MA), [URL], accessed September 2012.

#### Bibliography

Office of Massachusetts Attorney General Martha Coakley. “Examination of Health Care Cost Trends and Cost Drivers.” *Report for Annual Public Hearing Under G.L.C. 118g, § 6½(b)*, June 22, 2011 (Boston, MA), [URL], accessed September 2012.

## Report of U.S. presidential commission (online)

### Footnote

<sup>11</sup> *Report of the Presidential Commission on the Space Shuttle Challenger Accident*, vol. 1, chap. 5 (Washington, DC: Government Printing Office, 1986), <http://history.nasa.gov/rogersrep/v1p97.htm>, accessed October 2002.

### Bibliography

*Report of the Presidential Commission on the Space Shuttle Challenger Accident*. Vol. 1, chap. 5. Washington, DC: Government Printing Office, 1986. <http://history.nasa.gov/rogersrep/v1p97.htm>, accessed October 2002.

## Testimony before congressional committee (printed)

### Footnote

<sup>12</sup> U.S. Congress, Testimony Before the Committee on International Relations, Subcommittee on the Western Hemisphere, *China's influence in the Western Hemisphere: Hearing before the Committee on International Relations*, 109th Cong, 1st sess., April 6, 2005 (Washington: U.S. GPO, 2005).

## United States Code

### Footnote

<sup>13</sup> "Inventions patentable," Title 35 U.S. Code, Sec. 101, 2006 ed., Supplement 5, U.S. GPO, <http://tinyurl.com/mnxbhrm>, accessed January 2013.

## ILLUSTRATIONS

When citing a chart, illustration, or other graphical item, use the same style that is used to cite tables. See *Tables*.

## INTERVIEWS

See also *Remote Interviews*.

## Television<sup>12</sup>

### Footnote

<sup>1</sup> McGeorge Bundy, interview by Robert MacNeil, *MacNeil/Lehrer News Hour*, PBS, February 7, 1990.

### Bibliography

Bundy, McGeorge. Interview by Robert MacNeil. *MacNeil/Lehrer News Hour*. PBS. February 7, 1990.

## **Published or recorded**

### **Footnote**

<sup>1</sup> Thomas R. Piper, *Leadership & Learning*, interview by JoAnn Olson, VHS, directed by Wren Jareckie, Bennington Films, 1993.

### **Bibliography**

Piper, Thomas R. *Leadership & Learning*. Interview by JoAnn Olson. VHS, directed by Wren Jareckie. Bennington Films, 1993.

### **Footnote**

<sup>1</sup> “Nestle’s Chairman Peter Brabeck on why companies need to care about society,” interview by Shivvy Jervis, International Business Leaders Forum (IBLF), May 4, 2011, <https://www.youtube.com/watch?v=6LHp65DUk1I>.

### **Bibliography**

Brabeck, Peter. “Nestle’s Chairman Peter Brabeck on why companies need to care about society.” Interview by Shivvy Jervis, International Business Leaders Forum (IBLF), May 4, 2011. <https://www.youtube.com/watch?v=6LHp65DUk1I>.

## **Unattributed**

### **Footnote**

<sup>21</sup> Interview with health care worker, August 1, 2006.

## **Unpublished**

### **Footnote** (three variations)

<sup>14</sup> Gene Powell, interview by author, Fort Worth, Texas, July 26, 2011.

<sup>14</sup> Interview with Gene Powell, Fort Worth, Texas, July 26, 2011.

<sup>14</sup> Author’s interview with Gene Powell, Fort Worth, Texas, July 26, 2011.

### **Bibliography**

Powell, Gene. Interview by author. Fort Worth, TX, July 26, 2011.

## Journals

See *Periodicals (printed)*.

## LEGAL CASES

The following examples are shown in footnote format only.

### U.S. Supreme Court

<sup>1</sup> *Old Chief v. U.S.*, 117 S. Ct., 644 (1997).<sup>15</sup>

### Lower federal courts

<sup>2</sup> *Eaton v. IBM Corp.*, 925 F. Supp. 487 (S.D. Tex 1996).<sup>16</sup>

### State and local courts

<sup>3</sup> *Bivens v. Mobley*, 724 So. 2d 458, 465 (Miss. Ct. App. 1998).<sup>17</sup>

For more examples of legal citations, see the following resources:

*The Chicago Manual of Style*, 15th ed. (Chicago: University of Chicago Press, 2003), chap. 17. Also available online at [www.chicagomanualofstyle.org](http://www.chicagomanualofstyle.org).

*The Bluebook: A Uniform System of Citation* (Harvard Law Review Association).

Association of Legal Writing Directors, *ALWD Guide to Legal Citation*, 6th ed. (Wolters Kluwer Law & Business, 2017).

*Introduction to Basic Legal Citation*, ed. Peter W. Martin (Cornell Law School, Legal Information Institute, 2017), <http://www.law.cornell.edu/citation/>.

## LINKEDIN PROFILES

### Footnote

<sup>7</sup> Frank Napolitano, LinkedIn profile, <https://www.linkedin.com/in/frank-napolitano-1352b29>, accessed July 2016.

## MAGAZINES

SEE *PERIODICALS (PRINTED)*.

## MAPS

### Public domain maps

#### Footnote

<sup>15</sup> University of Texas Libraries, University of Texas at Austin, Perry Castañeda Library Map Collection, <http://www.lib.utexas.edu/maps/>, accessed May 2007.

#### Bibliography

University of Texas Libraries. University of Texas at Austin. Perry Castañeda Library Map Collection. <http://www.lib.utexas.edu/maps/>, accessed May 2007.

#### Footnote

<sup>16</sup> U.S. Department of the Interior, U.S. Geological Survey, National Map Team, <http://nmviewogc.cr.usgs.gov/>, accessed February 2006.

#### Bibliography

U.S. Department of the Interior. U.S. Geological Survey. National Map Team. <http://nmviewogc.cr.usgs.gov/>, accessed February 2006.

### Copyrighted maps

#### Footnote

<sup>17</sup> Used by permission of Graphic Maps, a d/b/a of the Woolwine-Moen Group, © 2007 Graphic Maps. All rights reserved. [URL], accessed July 2007.

#### Bibliography

Graphic Maps, a d/b/a of the Woolwine-Moen Group. © 2007 Graphic Maps. All rights reserved. [URL], accessed July 2007.

**NOTE:** The wording of citations for copyrighted information will vary according to each copyright holder's requirements. The *Terms & Conditions* link in most databases provides guidelines for using and citing their data.

## MARKET RESEARCH REPORTS

#### Footnote

<sup>18</sup> Jim Neil et al., "Digital Marketing," *The Forrester Report* 2:8 (April 1998), Forrester Research, Inc., <http://www.forrester.com>, accessed June 2000.

## **Bibliography**

Neil, Jim, Bill Bass, Jill Aldort, and Cameron O'Connor. "Digital Marketing." *The Forrester Report 2:8* (April 1998). Forrester Research, Inc. <http://www.forrester.com>, accessed June 2000.

## **MEMORANDUMS**

### **Footnote**

<sup>30</sup> Harold Lehman to Runako Gregg, memorandum regarding [subject], [date], [company], from [source of memorandum—e.g., company, person, or external source].

### **Bibliography**

Lehman, Harold, to Runako Gregg. Memorandum regarding [subject], [date], [company]. From [source of memorandum—e.g., company, person, or external source].

## **MINISODES**

### **Footnote**

<sup>31</sup> "Arnold the Entrepreneur," minisode adapted from same episode on *Diff'rent Strokes* (NBC, Season 7, Episode 8, originally aired November 17, 1984), available from YouTube, [URL], accessed April 15, 2009.

## **MOVIES**

### **Footnote**

<sup>32</sup> *Jerry McGuire*, directed by Cameron Crowe (Columbia/TriStar Pictures, 1996). Film.

### **Bibliography**

*Jerry McGuire*. Directed by Cameron Crowe. Columbia/TriStar Pictures, 1996. Film.

## **Movie (DVD)**

### **Footnote**

<sup>33</sup> *Jerry McGuire*, directed by Cameron Crowe (Columbia/TriStar Pictures, 1996; Sony Pictures, Special Edition DVD, 2002).

## **Movie (Blu-ray Disc)**

### **Footnote**

<sup>33</sup> *Jerry McGuire*, directed by Cameron Crowe (Columbia/TriStar Pictures, 1996; Sony Pictures, BD, 2008). See also *Videos and Multimedia; Webcasts*.

## MUSIC

### Recordings

#### Footnote

<sup>32</sup> Ludwig von Beethoven, *Piano Sonata No. 29* “Hammerklavier,” Peter Serkin, Proarte Digital CDD 270.

#### Bibliography

Beethoven, Ludwig von. *Piano Sonata No. 29* “Hammerklavier.” Peter Serkin. Proarte Digital CDD 270.<sup>11</sup>

#### Footnote

<sup>32</sup> “Umbrella,” featuring Jay-Z, MP3 audio, track 1 on Rihanna, *Good Girl Gone Bad*, Island Def Jam, 2007.<sup>13</sup>

#### Footnote

“Umbrella,” featuring Jay-Z, Spotify, track 1 on Rihanna, *Good Girl Gone Bad*, Island Def Jam, 2007.<sup>14</sup>

### Songs

#### Footnote

<sup>33</sup> “Don’t Start Believing,” Journey, 1981.

#### Footnote

<sup>33</sup> “All You Need Is Love,” The Beatles, 1967.

For more information about citing musical works, see *The Chicago Manual of Style*, 17<sup>th</sup> edition, section 8.193: “Musical works—additional resources.”

## NEWS RELEASES

See *Press Releases*.

## NEWS WEBSITES

### Signed article

#### Footnote

<sup>34</sup> Wylie Wong, “Software giants unite for Web services,” ZDNet News, February 5, 2002, [URL], accessed December 2005.

#### Bibliography

Wong, Wylie. "Software giants unite for Web services." ZDNet News, February 5, 2002. [URL], accessed December 2005.

### **Unsigned article**

#### **Footnote**

<sup>35</sup> "Mattel: Third Recall of Toys from China," September 5, 2007, CBS News, <http://tinyurl.com/m5dv4xf>, accessed September 2007.

#### **Bibliography**

CBS News. "Mattel: Third Recall of Toys from China." September 5, 2007. <http://tinyurl.com/m5dv4xf>, accessed September 2007.

### **NOTES:**

In a bibliography entry for an unsigned article, the name of the news organization (e.g., CBS News) should stand in place of the author's name.<sup>18</sup>

The names of news websites (e.g., Reuters, CBS News) should appear in roman (vs. italic) type.

## **NEWSPAPERS (PRINTED)**

### **Signed newspaper article (in a specific section)**

#### **Footnote**

<sup>36</sup> Thomas Smith, "New Debate over Business Records," *New York Times*, December 31, 1978, sec. 3, p. 5.

#### **Bibliography**

Smith, Thomas. "New Debate over Business Records." *New York Times*, December 31, 1978, sec. 3, p. 5.

### **Unsigned newspaper article**

#### **Footnote**

<sup>37</sup> "Raising Taxes on Private Equity," *New York Times*, June 26, 2007, p. E6.

#### **Bibliography**

*New York Times*. "Raising Taxes on Private Equity," June 26, 2007, p. E6.

### **Unsigned newspaper editorial**

#### **Footnote**

<sup>1</sup> Editorial, *Wall Street Journal*, August 28, 1997, p. A19.

#### **Bibliography**

*Wall Street Journal*. August 28, 1997. Editorial about interest rates.

**NOTE:** In a bibliography entry for an unsigned editorial, the name of the newspaper (e.g., *The Wall Street Journal*) should stand in place of the author's name).<sup>19</sup>

## **NEWSPAPERS (ONLINE)**

### **Footnote**

<sup>2</sup> Keith Bradsher, "India Adjusts Short-Term Interest Rates," *New York Times*, September 20, 2013, [URL], accessed September 2013.

### **Bibliography**

Bradsher, Keith. "India Adjusts Short-Term Interest Rates." *New York Times*, September 20, 2013. [URL].

## **NEWSWIRES**

The following examples are shown in footnote format only.

<sup>3</sup> Michael Liedtke, "LinkedIn Founder's Road to Riches Paved with Gold Connections," Associated Press, January 20, 2008, <http://www.ap.org>, accessed May 2008.

<sup>4</sup> "Countrywide's Chairman Mozilo delivers John T. Dunlop Lecture," press release, February 4, 2003, PR Newswire, <http://www.prnewswire.com>, accessed September 2004.

<sup>5</sup> "Global 1000 Companies and Analysts Endorse Infosys' 'Next Generation' Consulting Practice," Business Wire, July 14, 2005, [URL], accessed July 2008.

## **NOTES (HBS)**

HBS technical notes are often referred to as *notes*. When citing notes, use the same style that is used to cite cases.

### **Printed**

#### **Footnote**

<sup>6</sup> Arthur I. Segel and Oliver O. Hartleben, "Building Cities: A Technical Note," HBS No. 213-006 (Boston: Harvard Business School Publishing, 2012), p. 4.

#### **Bibliography**

Segel, Arthur I., and Oliver O. Hartleben. "Building Cities: A Technical Note." HBS No. 710-455. Boston: Harvard Business School Publishing, 2010.

## Online

### Footnote

<sup>7</sup> Ray A. Goldberg, Arthur I. Segel, “Farmland Investing: A Technical Note,” HBS No. 211-022 (Boston: Harvard Business School Publishing, 2010), <http://www.hbsp.harvard.edu>, accessed October 2012.

### Bibliography

Goldberg, Ray A., and Arthur I. Segel. “Farmland Investing: A Technical Note.” HBS No. 211-022. Boston: Harvard Business School Publishing, 2020. <http://www.hbsp.harvard.edu>, accessed October 2012.

## PATENTS

### Footnote

<sup>8</sup>Sarah Akin and David Johnson, Solar power conversion kit for umbrella, US10,285,477 B2, filed 10 October 2017 and issued 14 May 2019.

### Bibliography

Akin, Sarah and Johnson, David. Solar power conversion kit for umbrella. US10,285,477B2, filed 10 October 2017 and issued 14 May 2019.

## PERIODICALS (PRINTED)

### Signed articles

#### Footnote

<sup>8</sup> Paul A. Gompers, “The Rise of Venture Capital,” *Business and Economic History* 23 (Winter 1994): 12.

#### Bibliography

Gompers, Paul A. “The Rise of Venture Capital.” *Business and Economic History* 23 (Winter 1994): 1–24.

#### Footnote

P. Heller, “Degrees of Democracy: Some Comparative Lessons from India,” *World Politics* 52(4) (2000): 487.

#### Bibliography

Heller, P. “Degrees of Democracy: Some Comparative Lessons from India.” *World Politics* 52(4) (2000): 484–519.

#### Footnote

<sup>9</sup> Steven Levy, “The Connected Company,” *Newsweek*, April 28, 2003, p. 50.

### **Bibliography**

Levy, Steven. “The Connected Company.” *Newsweek*, April 28, 2003, pp. 48–52.

### **Unsigned articles**

#### **Footnote**

<sup>9</sup> “Leading Ferociously,” a conversation with Daniel Goldin, *Harvard Business Review* Vol. 80, No. 5 (May 2002): 23.

#### **Bibliography**

“Leading Ferociously.” A conversation with Daniel Goldin. *Harvard Business Review* Vol. 80, No. 5 (May 2002): 22–25.

#### **Footnote**

<sup>9</sup> “Chain Plans Emphasis on Dress, Sportswear Lines.” *Women’s Wear Daily* 70, no. 86 (May 02, 1945): 10, [URL], accessed March 2016.

#### **Bibliography**

*Women’s Wear Daily*. “Chain Plans Emphasis on Dress, Sportswear Lines.” 70, no. 86 (May 2, 1945): 7–10.

**NOTE:** According to *The Chicago Manual of Style*: “In citations to a particular passage in a journal article, only the pages concerned are given. In references to the article as a whole (as in a bibliography or reference list), first and last pages are given.”<sup>20</sup>

## **PERIODICALS (ONLINE)**

### **Article from online journal or magazine**

#### **Footnote**

<sup>12</sup> Joseph Ntayi, “Work Ethic and Locus of Control,” *Journal of African Business* 6, nos. 1, 2 (2005): 155, ABI/INFORM via ProQuest, accessed October 2006.

#### **Bibliography**

Ntayi, Joseph. “Work Ethic and Locus of Control.” *Journal of African Business* 6, nos. 1, 2 (2005): 151–155. ABI/INFORM via ProQuest, accessed October 2006.

### **Signed**

#### **Footnote**

<sup>13</sup> Richard Tomlinson, “The World’s Most Popular Sport Is a Mess of a Business,” *Fortune*, May 27, 2002, [URL], accessed June 2002.

## Bibliography

Tomlinson, Richard. "The World's Most Popular Sport Is a Mess of a Business." *Fortune*, May 27, 2001. [URL], accessed June 2002.

## Unsigned

### Footnote

<sup>14</sup> "World Publications becomes Bonnier Corp. after 19-magazine deal," *Orlando Business Journal*, March 5, 2007, <http://tinyurl.com/n9euvey>, accessed June 2010.

## Bibliography

"World Publications becomes Bonnier Corp. after 19-magazine deal." *Orlando Business Journal*, March 5, 2007. <http://tinyurl.com/n9euvey>, accessed June 2010.

## PERSONAL COMMUNICATIONS

### Footnote

<sup>26</sup> [Sender's Name], personal communication [or pers. comm.] to author, [Date].

### Footnote

<sup>1</sup> [Sender's Name], text message to author, [Date].

## PODCASTS

As the following examples show, some websites use the term *podcast* or *webcast* while others specify the file type, such as *audio* or *video*.

<sup>1</sup> Financial Industry Regulatory Authority (FINRA), "Conflicts of Interest in Public Offerings," April 19, 2010, podcast, <http://tinyurl.com/ojpmuy>, accessed October 2011.

<sup>2</sup> BBC, "The English We Speak: 'Get Lost,'" Monday, October 24, 2011, podcast, <http://www.bbc.co.uk/podcasts/series/tae>, accessed October 2011.

<sup>3</sup> Wharton School, University of Pennsylvania, "Home Truths about the Housing Market," September 5, 2007, audio file, Knowledge@Wharton, <http://tinyurl.com/m54yf92>, accessed September 2007.

See also *Webcasts*.

## POWERPOINT PRESENTATIONS

### Footnote

<sup>4</sup> Isaac Berne, "Patient Adherence," PowerPoint presentation, November 12, 2007, Harvard Business School, Boston, MA.

## **Bibliography**

Berne, Isaac. "Patient Adherence." PowerPoint presentation, November 12, 2007, Harvard Business School, Boston, MA.

See also *Conference Papers (Unpublished)*.

## **PRESS RELEASES**

### **Printed**

#### **Footnote**

<sup>1</sup> "Sun Charts Strategy for Services to Deliver High-Value Network Computing Environments," Sun Microsystems press release (Santa Clara, CA, December 3, 2002).

#### **Bibliography**

"Sun Charts Strategy for Services to Deliver High-Value Network Computing Environments." Sun Microsystems press release. Santa Clara, CA, December 3, 2002.

### **On the Web**

#### **Footnote**

<sup>5</sup> "NASD Fines Wachovia Securities \$2 Million for Fee-Based Account Violations," press release, June 21, 2007, on FINRA website, [URL], accessed September 2007.

#### **Bibliography**

NASD (National Association of Securities Dealers). "NASD Fines Wachovia Securities \$2 Million for Fee-Based Account Violations." press release, June 21, 2007. FINRA website, [URL], accessed September 2007.

## **PROCEEDINGS**

See *Conference Papers*.

## **RADIO PROGRAMS**

#### **Footnote**

<sup>6</sup> "Indian Software Firm to Outsource to U.S.," Adam Davidson, *Morning Edition*, National Public Radio, September 6, 2007, [URL], accessed September 2007.

#### **Bibliography**

"Indian Software Firm to Outsource to U.S." Adam Davidson. *Morning Edition*, National Public Radio, September 6, 2007. [URL], accessed September 2007.

### **Footnote**

<sup>7</sup>“Plans for Nuclear Waste Dump Hit a Snag,” Michele Norris, *All Things Considered*, National Public Radio, September 5, 2007, <http://tinyurl.com/md3du27>, accessed September 2007.

## **REMOTE INTERVIEWS**

When citing a remote interview, include the name of the app as well as the location of the participants.

### **Generic Example**

<sup>8</sup> Interviewee Name in City, State, interview by Interviewer Name in City, State, via App Name, Date.

### **Specific Example**

<sup>9</sup> John Doe in Seattle, Oregon, interview by Juniper Parelli in Boston, Mass., via Skype, March 3, 2020.

## **RESEARCH PAPERS**

See *Working Papers (Printed)*.

## **SEC FILINGS**

### **Footnote**

<sup>8</sup> Amazon.com, Inc., June 30, 1997 Form 10-Q (filed August 14, 1997), via Refinitiv/AMR accessed June 2007.

### **Bibliography**

Amazon.com, Inc. June 30, 1997 Form 10-Q. Filed August 14, 1997. Refinitiv/AMR accessed June 2007.

### **Footnote**

<sup>9</sup> Alcoa Inc., December 31, 2006 Form 10-K, [URL], accessed July 2007.

### **Bibliography**

Alcoa Inc. December 31, 2006 Form 10-K. [URL], accessed July 2007.

## **SECONDARY SOURCES**

It is best to consult an original source whenever possible, but if the original source is unavailable, use the following citation style. (In the following examples, the Zukofsky article is the original source.)

### **Footnote**

<sup>10</sup> Louis Zukofsky, “Sincerity and Objectification” *Poetry* 37 (February 1931): 269, quoted in Bonnie Costello, *Marianne Moore: Imaginary Possessions* (Cambridge, MA: Harvard University Press, 1981), p. 78.<sup>21</sup>

### **Bibliography**

Zukofsky, Louis. “Sincerity and Objectification.” *Poetry* 37 (February 1931): 269. Quoted in Bonnie Costello, *Marianne Moore: Imaginary Possessions* (Cambridge, MA: Harvard University Press, 1981), p. 78.<sup>22</sup>

## **SPEECHES**

### **Footnote**

<sup>11</sup> Jill Bamberg, “Growing Your Business Without Selling Out,” speech given at Green Business Conference, Moscone Center, San Francisco, CA, November 10–12, 2006.

### **Footnote**

Solmaz Altın, “Pension Speech,” given at The Second Annual Istanbul Pension Fund Conference, Istanbul, Turkey, February 2, 2015.

## **TABLES**

Source lines are typically used to cite the source of a table or other graphical item.

### **Data from a table**

Source: Data excerpted from Michael Y. Yoshino and Thomas B. Lifson, *The Invisible Link* (Cambridge: MIT Press, 1986), p. 78, Table 4.3.

### **Entire table (or other graphical item)**

Source: Michael E. Porter, *Competitive Strategy* (New York: The Free Press, 1998), p. 73, Figure 3-4. Used with permission from The Free Press.

## **TECHNICAL NOTES**

HBS technical notes are often referred to as *notes*. When citing notes, use the same style that is used to cite cases.

## **TELEVISION PROGRAMS**

### **Footnote**

<sup>12</sup> “Blackout: Interview with Ken Lay,” *Frontline*, PBS, March 27, 2001, <http://tinyurl.com/kb6k9wo>, accessed August 2004.

## Bibliography

“Blackout: Interview with Ken Lay.” *Frontline*, PBS, March 27, 2001.  
<http://tinyurl.com/kb6k9wo>, accessed August 2004.

## THESES AND DISSERTATIONS<sup>23</sup>

### Footnote

<sup>13</sup> Andrew J. King, “Law and Land Use in Chicago: A Pre-history of Modern Zoning” (Ph.D. diss., University of Wisconsin, 1976), pp. 32–37.

### Bibliography

King, Andrew J. “Law and Land Use in Chicago: A Pre-History of Modern Zoning.” (Ph.D. Diss., University of Wisconsin, 1976).

## TRANSCRIPTS

### Conference speech

#### Footnote

Person’s Name, Person’s Title, remarks made at [Conference Name], Location, Date. From transcript provided by CQ FD Disclosure, URL, accessed [month/year].

### Television program

#### Footnote

<sup>14</sup> [Name of Episode], *Dateline*, NBC, April 30, 1996, hosted by Jane Pauley and Stone Phillips. From transcript provided by BurrellesLuce, [URL] accessed October 2009.

## TWITTER

The following examples are shown in footnote format only.

### Generic Example

<sup>15</sup> First Name, Last Name (Twitter handle), “The tweet in its entirety,” Twitter, Date, Time, URL.

### Specific Examples

<sup>16</sup> Tyra Banks (@tyrabanks), “Broke up with the gym this morning. It just wasn’t working out,” Twitter, 24 June 2013, 7:11 a.m., <https://twitter.com/tyrabanks>.

<sup>17</sup> Academy of Medical-Surgical Nurses (@AMSN), “Writing a letter to an elected official can be a great way to be someone who actually makes a difference,” Twitter, 7 April 2011, 5:51 a.m., [URL].

**NOTE:** If the company’s name and Twitter handle are the same, then it’s OK to omit the Twitter handle from the citation. For example:

<sup>18</sup> TechCrunch, “Apple Re-Invents Its Wheel with iOS7, Takes Developers Along For the Ride,” Twitter, 18 September 2013, 12:20 p.m., [URL].

<sup>19</sup> MarketWatch, “He’s baaaaack. Furby reclaims spot on Wal-Mart’s list of ‘hot’ holiday toys,” Twitter, 15 September 2013, 4:35 a.m., [URL].

**NOTE:** If the citation includes the complete text of the tweet, then the URL is optional. For example:

<sup>20</sup> The Economist, “When the Frankfurt motor show opens this weekend visitors will encounter many new electric vehicles,” Twitter, 12 September 2013, 6:43 p.m.

## UNPUBLISHED PAPERS

### Footnote

<sup>21</sup> Robin Greenwood, “Price pressure in corporate spinoffs” (paper, Harvard Business School, October 9, 2006), <http://people.hbs.edu/rgreenwood/spinoffs6.pdf>, accessed April 2009.

See also *Working Papers (Printed)*.

## VIDEOS AND MULTIMEDIA

### Commercial video

#### Footnote

<sup>22</sup> *National Treasure*, dir. Jon Turteltaub (Touchstone Pictures, Jerry Bruckheimer Films, 2004; VHS, Buena Vista Home Video, 2005).

#### Footnote

<sup>23</sup> *Forrest Gump*, dir. Robert Zemeckis (Paramount Pictures, 1994; DVD, Paramount, 2001).

### HBS video (multimedia)

#### Footnote

<sup>1</sup> David Garvin, “Paul Levy: Taking Charge of the Beth Israel Deaconess Medical Center,” HBS Multimedia Video No. 303-058 (Boston: Harvard Business School Publishing, 2009).

## **Bibliography**

Garvin, David. "Paul Levy: Taking Charge of the Beth Israel Deaconess Medical Center." HBS Multimedia Video No. 303-058. Boston: Harvard Business School Publishing, 2009.

## **HBS video (special event)**

### **Footnote**

<sup>2</sup> Kevin Sharer, "Kevin Sharer on Leadership," lecture given on October 18, 2001, at Harvard Business School, Boston, MA. From HBS Video Showcase Event Archives, 2001–2002, [URL], accessed August 2002.

### **Bibliography**

Sharer, Kevin. "Kevin Sharer on Leadership." Lecture given on October 18, 2001, Harvard Business School, Boston, MA. From HBS Video Showcase Event Archives, 2001–2002, [URL], accessed August 2002.

## **YouTube video**

### **Footnote**

<sup>3</sup> Stanford Graduate School of Business, "Ken Chenault: Reinventing Your Brand," YouTube, published June 12, 2013, [URL], accessed August 2013.

### **Bibliography**

Stanford Graduate School of Business. "Ken Chenault: Reinventing Your Brand," YouTube, published June 12, 2013. [URL], accessed August 2013.

### **Footnote**

<sup>4</sup> Mag+, "How to install Mag+," YouTube, uploaded December 13, 2011, [URL], accessed February 2013.

### **Bibliography**

Mag+. "How to install Mag+." YouTube, uploaded December 13, 2011. [URL], accessed February 2013.

## **WEBCASTS**

As the following examples show, some websites use the terms *podcast* or *webcast* and others specify the file type, such as *audio* or *video*.

### **Footnote**

<sup>5</sup> Ken Train, "Lecture 8: Monopoly," *Introduction to Economics*, Fall 2011, webcast, University of California, Berkeley, [URL], accessed November 2011.

## **Bibliography**

Train, Ken. "Lecture 8: Monopoly." *Introduction to Economics*, Fall 2011. webcast. University of California, Berkeley. [URL], accessed November 2011.

## **Footnote**

<sup>6</sup> Nigel Cassidy, "Romania's Economic Journey," September 26, 2006, video file, BBC News, <http://www.bbc.co.uk/>, accessed September 2007.

See also *Podcasts; Videos and multimedia*.

## **WEBSITES**

### **Company website**

#### **Footnote**

<sup>1</sup> Walt Disney Company, "Company Overview," <http://corporate.disney.go.com/corporate/overview.html>, accessed June 2011.

#### **Bibliography**

Walt Disney Company. "Company Overview." <http://corporate.disney.go.com/corporate/overview.html>, accessed June 2011.

### **Personal website**

#### **Footnote**

<sup>7</sup> Nathan Shedroff, <http://www.nathan.com/>, accessed August 2007.

#### **Bibliography**

Shedroff, Nathan. <http://www.nathan.com>, accessed August 2007.

### **Other kinds of websites**

#### **Footnote**

<sup>8</sup> Ira Stoll, "Mitch Daniels on the State of the Nation," FutureOfCapitalism.com, March 8, 2010, [URL], accessed April 2011.

#### **Bibliography**

Stoll, Ira. "Mitch Daniels on the State of the Nation." FutureOfCapitalism.com, March 8, 2010. [URL], accessed April 2011.

## **WORKING PAPERS (PRINTED)**

**NOTE:** The copyright holder for an academic working paper is typically the author.

## Printed

### Footnote

<sup>9</sup> Ashish Nanda, “Implementing Organizational Change,” HBS Working Paper No. 96-034, 1996, p. 4.

### Bibliography

Nanda, Ashish. “Implementing Organizational Change.” HBS Working Paper No. 96-034, 1996.

### Footnote

<sup>9</sup> Enrico Moretti, “Social Returns to Education and Human Capital Externalities: Evidence from Cities,” Center for Labor Economics, University of California, Berkeley, Working Paper #9 (November 1998).

### Bibliography

Moretti, Enrico. “Social Returns to Education and Human Capital Externalities: Evidence from Cities.” Center for Labor Economics, University of California, Berkeley, Working Paper #9 (November 1998).

## WORKING PAPERS (ONLINE)

### On the Web

#### Footnote

<sup>10</sup> Josh Lerner, “150 Years of Patent Protection,” HBS Working Paper No. 00-040, 1999, <http://www.hbs.edu/research/facpubs/workingpapers/abstracts/9900/00-040.html>, accessed May 2001.

#### Bibliography

Lerner, Josh. “150 Years of Patent Protection.” HBS Working Paper No. 00-040, 1999. <http://www.hbs.edu/research/facpubs/workingpapers/abstracts/9900/00-040.html>, accessed May 2001.

## YELP REVIEWS

### Footnote

<sup>63</sup> “Fit-Lite by 24 Hour Fitness,” Yelp review by Quyen T., November 28, 2007, [https://www.yelp.com/biz/fit-lite-by-24-hour-fitness-berkeley-2?sort\\_by=date\\_asc](https://www.yelp.com/biz/fit-lite-by-24-hour-fitness-berkeley-2?sort_by=date_asc), accessed October 2017.

## **Bibliography**

T., Quyen. "Fit-Lite by 24 Hour Fitness." Yelp review, November 28, 2007.  
[https://www.yelp.com/biz/fit-lite-by-24-hour-fitness-berkeley-2?sort\\_by=date\\_asc](https://www.yelp.com/biz/fit-lite-by-24-hour-fitness-berkeley-2?sort_by=date_asc),  
accessed October 2017.

# Citations of Commercial Databases

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This section shows how to cite information from commercial databases. A few notes:

- Brackets [...] indicate variables to be supplied by the writer.
- When you cite information from a database, remember to mention both the copyright holder/owner of the information, and the provider that made it available. In addition, if you want to distribute the information outside the classroom, you should seek permission from the copyright holder. **Be sure to check the copyright holders' requirements before distributing any of their information outside the classroom.** The *Terms & Conditions* or *Copyright* link in most databases provides guidelines for using and citing their data.
- URLs are optional in database citations. If you include a URL, use only the briefest form which points to the main page of the database.
  - The following examples cover some of the most frequently used databases at Baker Library. For a complete list, see <https://www.library.hbs.edu/Find/Databases>.

## ABI/ProQuest

### Generic Example

Source: [Description of information — e.g., author, title, publisher, date, etc.], ABI/ProQuest via ProQuest, accessed [month/year].

### Specific Example

Source: BMI Research, "Cameroon Agribusiness Report Q4 2015," Business Monitor International Ltd., 2015, ABI/INFORM via ProQuest, accessed September 2015.

## BCC Research

### Information Owned by BCC

Source: BCC Research, accessed [month/year].

### Other Information

Source: [Description of information], via BCC Research, accessed [month/year].

## Bloomberg

### Information Owned by Bloomberg

Source: Bloomberg LP, accessed [month/year].

### Other Information

Source: [Description of information], via Bloomberg LP, accessed [month/year].

## Business Source Complete

Source: [Description of information], Business Source Complete, EBSCOhost, [access date].

**Capital IQ**

Source: [Description of information], S&P Capital IQ, Inc., a division of S&P Global Inc.

**Compustat (see *Standard & Poor's*)****Datastream****Information Owned by Datastream**

Source: Refinitiv/Datastream, accessed [month/year].

**Other Information**

Source: [Description of information], via Refinitiv/Datastream, accessed [month/year].

**Economist Intelligence Unit (EIU)**

Source: Economist Intelligence Unit, [Description of information—e.g., EIU Country Data or EIU Country Report, author, title, date, etc.], accessed [month/year].

**eMarketer/Insider Intelligence**

Source: [Description of information], eMarketer/Insider Intelligence, accessed [month/year].

**EMIS (Emerging Markets Information System)**

Source: [Description of information], EMIS, an ISI Emerging Markets Group Company, accessed [month/year].

**Euromonitor (see *Passport*)****Factiva**

Source: [Description of information], via Factiva, accessed [month/year].

**FactSet**

Source: [Description of information], FactSet, accessed [month/year].

**Frost & Sullivan**

Source: [Description of information], Frost & Sullivan, accessed [month/year].

**Gartner****Text:**

Source: [Description of information], Gartner, Inc., accessed [month/year].

**Graphics:**

Source: [Source line under graphic], as published in [description of info.], Gartner, Inc., accessed [month/year].

**Global Financial Data**

Source: [Description of information], GFD Finaeon Inc., accessed [month/year].

**IBISWorld**

Source: [Description of information], IBISWorld, accessed [month/year].

**JSTOR**

Source: [Description of information], via JSTOR, ITHAKA accessed [month/year].

**Mintel Reports**

Source: [Description of information], Mintel, accessed [month/year].

**NetAdvantage (see *Standard & Poor's*)****Nexis Uni**

Source: [Description of information], via LexisNexis, accessed [month/year].

**OECD iLibrary**

Source: [Description of information], OECD iLibrary, accessed [month/year].

**Orbis**

Source: [Description of information], Bureau van Dijk, accessed [month/year].

**Passport**

Source: [Description of information], Euromonitor International, accessed [month/year].

**PitchBook**

Source: [Description of information], PitchBook Data, Inc, accessed [month/year].

**Preqin**

Source: [Description of information], Preqin Ltd, accessed [month/year].

**Refinitiv Workspace**

Source: [Description of information], Refinitiv accessed [month/year].

**SDC Platinum (Securities Data Company)**

Source: [Description of information], SDC Platinum, a Refinitiv product, accessed [month/year].

**Standard & Poor's (S&P)****Compustat Data**

Source: Standard & Poor's Compustat data via WRDS, accessed [month/year].

**Execucomp**

Source: Standard & Poor's Execucomp data via WRDS, accessed [month/year].

**RatingsDirect**

Source: Standard & Poor's RatingsDirect, accessed [month/year].

**NetAdvantage**

Source: Standard & Poor's NetAdvantage, accessed [month/year].

**Statista**

Source: [Description of information], via Statista, accessed [month/year].

**World Development Indicators (WDI Online)**

Source: World DataBank, The World Bank Group, accessed [month/year].

# Endnotes

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<sup>1</sup> Gordon Harvey, “The Role of Sources,” in *Writing with Sources: A Guide for Students*, second edition (Indianapolis/Cambridge: Hackett Publishing Company, 2008), p. 14.

<sup>2</sup> *The Chicago Manual of Style*, 15<sup>th</sup> ed. (Chicago: University of Chicago Press, 2003), section 16.42.

<sup>3</sup> *Ibid.*, section 17.213.

<sup>4</sup> *The Chicago Manual of Style Online*, 16<sup>th</sup> edition (University of Chicago: 2010), FAQ about Documentation, [http://www.chicagomanualofstyle.org/CMS\\_FAQ/Documentation/Documentation173.html](http://www.chicagomanualofstyle.org/CMS_FAQ/Documentation/Documentation173.html), accessed October 2011.

<sup>5</sup> *The Chicago Manual of Style*, 15<sup>th</sup> ed., section 17.47.

<sup>6</sup> *The Chicago Manual of Style Online*, 16<sup>th</sup> ed. (University of Chicago: 2010), section 14.249.

<sup>7</sup> *The Chicago Manual of Style*, 15<sup>th</sup> ed., section 17.208.

<sup>8</sup> *Ibid.*, section 17.309.

<sup>9</sup> *Ibid.*, section 17.307.

<sup>10</sup> *Ibid.*

<sup>11</sup> *Ibid.*, section 17.268.

<sup>12</sup> *The Chicago Manual of Style*, 17<sup>th</sup> ed., section 14.213, example 2.

<sup>13</sup> *Ibid.*, section 14.263, example 5.

<sup>14</sup> *Ibid.*, example 6.

<sup>15</sup> *The Chicago Manual of Style*, 15<sup>th</sup> ed., section 17.284.

<sup>16</sup> *Ibid.*, section 17.285.

<sup>17</sup> *Ibid.*, section 17.286.

<sup>18</sup> *Ibid.*, section 17.47.

<sup>19</sup> *Ibid.*, section 17.192.

<sup>20</sup> *Ibid.*, section 17.168.

<sup>21</sup> *Ibid.*, section 17.274.

<sup>22</sup> *Ibid.*

<sup>23</sup> *The Chicago Manual of Style*, 14<sup>th</sup> ed., section 15.271.

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*The Chicago Manual of Style*. 14th ed. Chicago: University of Chicago Press, 1993.

*The Chicago Manual of Style*. 15th ed. Chicago: University of Chicago Press, 2003.

*The Chicago Manual of Style Online*. 16th ed. University of Chicago, 2010.  
[www.chicagomanualofstyle.org](http://www.chicagomanualofstyle.org), accessed September 2014.

*The Chicago Manual of Style Online*. 17th ed. Chicago: University of Chicago, 2017.  
<http://www.chicagomanualofstyle.org/home.html>, accessed August 2018.

Columbia University Press, "Preparing the Bibliographic Material," excerpt from *The Columbia Guide to Online Style*, 2nd. ed., by Janice R. Walker and Todd Taylor (New York: Columbia University Press, 2006), <http://www.columbia.edu/cu/cup/cgos2006/basic.html>, accessed September 2007.

Harnock, Andrew, and Eugene Kleppinger. "Using Chicago Style to Cite and Document Sources." *Online! A reference guide to using Internet sources*. Bedford/St. Martin's, 2001.  
<http://www.bedfordstmartins.com/online/cite7.html>, accessed August 2002.

Harvey, Gordon. *Writing with Sources: A Guide for Students*. Second edition.  
Indianapolis/Cambridge: Hackett Publishing Company, 2008.

Martin, Paul R. *The Wall Street Journal Guide to Business Style and Usage*. New York: Simon and Schuster, 2002.

Princeton University. *Academic Integrity at Princeton*. <http://www.princeton.edu/pr/pub/integrity/pages/intro/index.htm>, accessed October 2009.