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Water Research Foundation

Custom Style Sheet for Knowledge Portal documents

Sample segments

Citations and Reference Guide

compiled by Donna Matrazzo

Citations in text

- Researcher(s) and date, or agency/entity and date

EXAMPLES:

(Goldstein 2002)

(Goldstein and Smith 2002)

(Goldstein et al. 2002)

(EPA 2006)

(Brown et al., forthcoming)

(Drewes et al. 2008, Hofman et al. 2006)

(EPA 2015b)

- PUBLISHED FOUNDATION REPORTS

- italicize the report title
- list the researcher or principal investigator
- list the publication year
- include the project number in the text or follow the title in parentheses
- Foundation project names can be shortened to “project #xxxx”
- Titles can be shorted to a key word (plus rest of citation)
- Multiple initials for first and middle names have a space in between

EXAMPLES:

Jeff Hughes was the principal investigator of the report,
*Surviving or Thriving in Economic Recession: Strategies of Water
Utility Leaders* (Hughes 2009).

This challenge led the Water Research Foundation to fund
Lead and Copper Corrosion Control in New Construction
(Edwards et al. 2011)

Daily Notes of a Trip Around the World could be shortened
to *Daily Notes* (DMoS 14.28)

- ONGOING FOUNDATION PROJECTS

- include quotations around the project name
- include the project number in the text or follow the title in parentheses
- Titles by other entities can be shorted to a key word (plus rest of citation)

EXAMPLES:

Liu is the principal investigator of the ongoing project #4300,
“Developing a Genetic-Based Approach ...”

Water Research Foundation project “Climate Change Impacts on Lake Erie Disinfection Byproduct Information” (Seidel, forthcoming).

WRF Web resources

EXAMPLES:

See the [Utility Finance Knowledge Portal](#) (WRF 2016).

See [Adaptation Topic Overview](#) (WRF 2016).

(no quotation marks or italics)

PUBLISHED REPORTS BY OTHERS

- italicize the report title
- list the researcher or principal investigator
- list the publication year
- Titles can be shorted to a key word (plus rest of citation)

EXAMPLE: (looked through the five Overviews for Advanced Water Treatments and couldn't find any)

PUBLISHED ARTICLES (BY OTHERS)

- Title of article in quote. Use actual document to decide on uppercase for words in the title

REGULATION NAMES

- Do not put quotation marks around the names

EXAMPLE:

... two drinking water regulations: the Long Term 2 Enhanced Surface Water Treatment Rule (EPA 2006b) and the Stage 2 Disinfectant/Disinfection By-products Rule (EPA 2006a).

- URLs
 - WRF prefers not to have URLs inserted into narrative text.
 - use author-date
- WRF PROJECT NUMBERS IN BODY OF TEXT
 - in narrative text, when authors mention project number and title, it should be left in. One reason for this is, sometimes authors introduce a project by mentioning the number AND the title, but then only refer to the project number thereafter. So, taking it out might not always be helpful for the reader.

NUMBERS IN TEXT (according to Chicago Manual of Style)

- Whole numbers from one through 100, round numbers and any number beginning a sentence is spelled out.
- In scientific documents, you can follow the simple rule of spelling out only single digit numbers (1-9) and using numerals for all others – except that you should have both in the same sentence unless they are in different categories (one of 103 stories)

INDENT IN TEXT (to signify the following is adapted)

Left: 54 pt

Right: 54 pt.

End the adaptation-note sentence with a period

References

- Reference indent Paragraph Format is: all zeros, single spacing. then Special is 24 pt, hanging. (Have to type in the 24 pt first and then add the Hanging).
- ARTICLE (CMS)
 - Author(s). Date. Article title. *Publication in italics*. Volume/number:
Page(s)
 - Title of journal articles: No quotation marks, sentence case, no italics.
 - Name of journal should be title case, and in italics.

EXAMPLE:

[Frenzel, B. 1968. The Pleistocene vegetation of northern Eurasia. *Science* 161:637-49.](#)

- BOOK (CMS)
 - Author(s). Date. *Title in italics*. Publication city. Publisher.

EXAMPLE:

[Morris, R., and D. Morris. 1966. *Men and pandas*. New York: McGraw-Hill.](#)

- PUBLISHED WRF REPORTS
 - Author(s). Date. *Title in italics* (and hyperlink). Project #. City, state (abbreviated,

CMS style): Publisher

(Use Chicago Manual indent: Hanging 24 point – it will want to go back and show “first line, so you have to make sure it’s correct)

- Hyperlink the title but do not include the URL
- AWWRF was changed to Water Research Foundation as of January 2009. Works prior to 2009 should say AwwaRF.

EXAMPLE:

Friedman, M., A. Hill, S. Booth, M. Hallett, L. McNeill, J. McLean, D. Stevens, D. Sorensen, T. Hammer, W. Kent, M. De Haan, K. MacArthur, and K. Mitchell. 2016. *Metals Accumulation and Release Within the Distribution System: Evaluation and Mitigation*. Project #4509. Denver, Colo.: Water Research Foundation.

• ONGOING WRF PROJECTS

- Author(s). Forthcoming. Title “in quotation marks.” City, state (abbreviated, CMS style): Publisher
If I can’t find the authors, ask Megan—she’ll know who they are. (Use the project # and hyperlink if you have/can find them)
- Hyperlink the title but do not include the URL

EXAMPLE:

Brown, J., G. Upadhyaya, and C. Lauderdale. Forthcoming. “North American Biofiltration Knowledge Base.” Denver, Colo.: Water Research Foundation.

WRF Web info. Like this and include hyperlink (plus reference formatting that isn’t showing up correctly here)

EXAMPLE:

WRF (Water Research Foundation). 2016. [“Utility Finance Knowledge Portal.”](#) Denver, Colo.: Water Research Foundation

WRF (Water Research Foundation). 2016. [“Climate Change Adaptation Topic Overview.”](#) Denver, Colo.: Water Research Foundation

WEBSITES • ONLINE REPORTS • ONLINE PDF DOCUMENTS • MANUALS
(All 3rd PARTY SOURCES)

- If it is a report, put the title in italics.
- Other than a report, put the title in quotation marks, headline case, no italics.
- Spell out all URLs, and hyperlink them (even those the author did not include and just hyperlinked in the text.)
- Do not use access dates.
- Do not go and search for URLs if the author didn’t include them.

- Follow upper and lower case in the titles themselves.

EXAMPLE FOR A WEBSITE: (incorporate the hyperlink in the title if you have it)

EPA (U.S. Environmental Protection Agency). 2016. "Learn the Issues."
www.epa.gov/learn-issues

EXAMPLE FOR A MANUAL:

AWWA (American Water Works Association). 2009. *M36: Water Audits and Loss Control Programs*. 3rd ed. Denver, Colo.: AWWA. + URL (hyperlinked)

EPA RULES

EPA (U.S. Environmental Protection Agency). 2007. "Simultaneous Compliance Guidance for the Long Term 2 and Stage 2 DBP Rules." + URL (hyperlinked)

REPEATS REFERENCE ORGANIZATIONS – use 3-em dash

Schuman, H., and J. Scott. 1987. "Problems in the Use of Survey Questions to Measure Public Opinion." *Science* 236:957–59.

———. 1989. "Generations and Collective Memories." *American Sociological Review* 54:359–81

———. 2004.

REPEATS IF THEY HAVE THE SAME YEAR (+ "a", "b", "c" etc.)

EPA (U.S. Environmental Protection Agency). 2015a. "Ground Water Rule." Accessed June 3, 2016.
<https://www.epa.gov/dwreginfo/ground-water-rule>

———. 2015b. "Revised Total Coliform Rule And Total Coliform Rule. Accessed June 3, 2016.
<http://www.epa.gov/dwreginfo/revised-total-coliform-rule-and-total-coliform-rule>

———. 2015c. "Surface Water Treatment Rules." Accessed June 3, 2016.
<https://www.epa.gov/dwreginfo/surface-water-treatment-rules>

HYPERLINKS and URLs

- Test all the hyperlinks to make sure they work
- Put the URL in a hyperlink in the title for WRF projects
- For 3rd Party documents, put the URL and hyperlink it

-EXAMPLE FOR HUMONGOUS URL:

EPA (U.S. Environmental Protection Agency). 2005. *Membrane Filtration Guidance Manual*. Office of Water. EPA 815-R-06- 009. November, 2005.

<http://nepis.epa.gov/Exe/ZyNET.exe/901V0500.TXT?ZyActionD=ZyDocument&Client=EPA&Index=2000+Thru+2005&Docs=&Query=&Time=&EndTime=&SearchMethod=1&TocRestrict=n&Toc=&TocEntry=&QField=&QFieldYear=&QFieldMonth=&QField>

Day=&IntQFieldOp=0&ExtQFieldOp=0&XmlQuery=&File=D%3A%5Czyfiles%5CIndex%20Data%5C00thru05%5CTxt%5C00000012%5C901V0500.txt&User=ANONYMOUS&Password=anonymous&SortMethod=h%7C-&MaximumDocuments=1&FuzzyDegree=0&ImageQuality=r75g8/r75g8/x150y150g16/i425&Display=p%7Cf&DefSeekPage=x&SearchBack=ZyActionL&Back=ZyActionS&BackDesc=Results%20page&MaximumPages=1&ZyEntry=1&SeekPage=x&ZyPURL

MATCH REFERENCES IN FACT SHEET TO TEXT

If a reference in the list isn't cited in the text, check to see if it was used:

- Do a search to find it in the Overview
- Search for about four words or a phrase from the Overview and see if it was used in the Fact Sheet.
- If there's no exact match, delete the reference from the Fact Sheet.

Figure/Table citations in text

TABLES

- Table captions go above the tables.
- All captions in **bold type**. No period unless the caption is a sentence.
- Table source lines go under the table. Where possible, add an additional row to the very bottom of the table and paste the source line there so that it is actually part of the table. Source lines NOT in bold type. How to do this: highlight all cells in that bottom row, right click, and select "Merge Cells." Then, you can align the source line to the left. (MK) Use source lines for WRF and everyone else.

FIGURES

- Figure captions go below the figures.
- All captions in **bold type**. No period unless the caption is a sentence.
- Figure source lines go under the figure. Source lines NOT in bold type.

SOURCE CREDIT

- Credit sources only if an entity outside the Principal Investigator's firm.
- Use source lines for WRF and everyone else. We want to cite everything, even if it was from a WRF report.

EXAMPLE

Source: EPA 2016

Source: Schendel et al. 2009

EXAMPLE OF CAPTIONS AND CREDITS FOR TWO-PART FIGURES

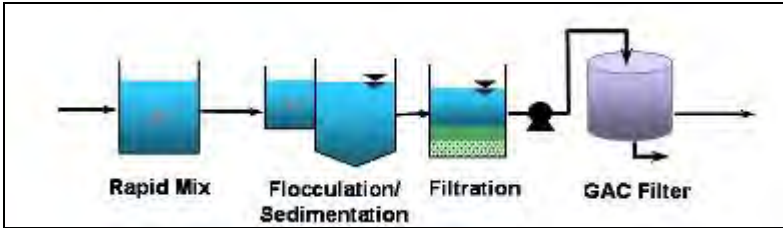
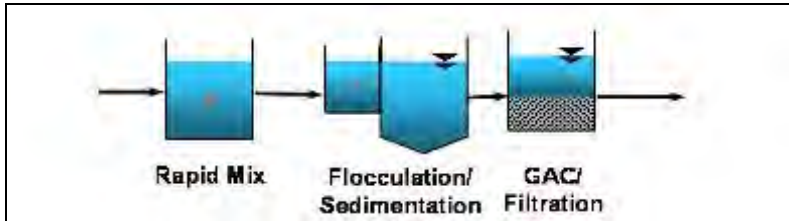


Figure 1. GAC contactor locations

(a) Post-filtration adsorption. The GAC unit is located after the conventional filtration process (post-filter contactors or adsorbers).



(b) Filtration-adsorption. Some or all of the filter media in a granular media filter is replaced with GAC.

Source: EPA 2016

Things I looked up and/or decided:

- acid-digested
- aluminum-based (adj. with hyphen)
- anaerobic sulfate-reducing (adj. with hyphen)
- anion exchange membrane
- annually-averaged
- are in fact (no commas)
- antidegradation
- billion-dollar weather disaster
- blue-green algae
- boil-water orders
- bottom-up approach
- broad-based (adj. with hyphen)
- buy-in

by-product (the rule itself says Byproducts but WRF docs show hyphen)
cancer-causing (adj. with hyphen)
cation exchange membrane
capital-intensive (adj. with hyphen)
carbon negative
carbon neutral
cast iron
cell-bound metabolism (adj. with hyphen)
cement mortar
chrome plating
climate-related adaptation (adj. with hyphen)
close fit pipe
CO₂, CO₄ (instead of subscript CO₂, CO₄)
co-funding
colocation
commonly used
community-defined (adj. with hyphen)
conservation-based (adj. with hyphen)
continued – abbreviation is cont'd. or cont.