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Effective citing and referencing

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The IB programme continuum of international education
Effective citing and referencing

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The International Baccalaureate Organization (known as the IB) offers four high-quality and challenging educational programmes for a worldwide community of schools, aiming to create a better, more peaceful world. This publication is one of a range of materials produced to support these programmes.

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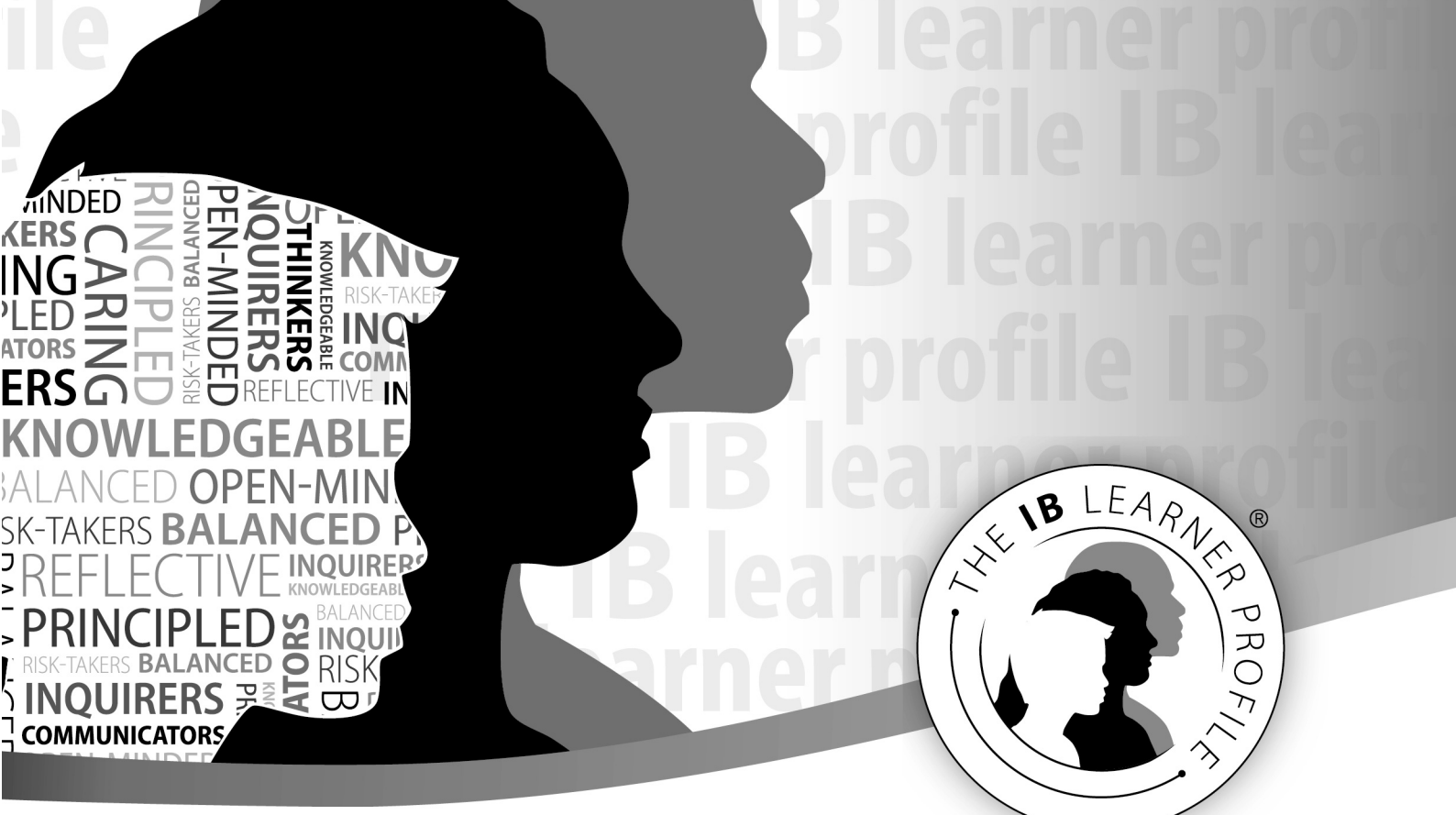

IB learner profile

The aim of all IB programmes is to develop internationally minded people who, recognizing their common humanity and shared guardianship of the planet, help to create a better and more peaceful world.

As IB learners we strive to be:

INQUIRERS
We nurture our curiosity, developing skills for inquiry and research. We know how to learn independently and with others. We learn with enthusiasm and sustain our love of learning throughout life.

KNOWLEDGEABLE
We develop and use conceptual understanding, exploring knowledge across a range of disciplines. We engage with issues and ideas that have local and global significance.

THINKERS
We use critical and creative thinking skills to analyse and take responsible action on complex problems. We exercise initiative in making reasoned, ethical decisions.

COMMUNICATORS
We express ourselves confidently and creatively in more than one language and in many ways. We collaborate effectively, listening carefully to the perspectives of other individuals and groups.

PRINCIPLED
We act with integrity and honesty, with a strong sense of fairness and justice, and with respect for the dignity and rights of people everywhere. We take responsibility for our actions and their consequences.

OPEN-MINDED
We critically appreciate our own cultures and personal histories, as well as the values and traditions of others. We seek and evaluate a range of points of view, and we are willing to grow from the experience.

CARING
We show empathy, compassion and respect. We have a commitment to service, and we act to make a positive difference in the lives of others and in the world around us.

RISK-TAKERS
We approach uncertainty with forethought and determination; we work independently and cooperatively to explore new ideas and innovative strategies. We are resourceful and resilient in the face of challenges and change.

BALANCED
We understand the importance of balancing different aspects of our lives—intellectual, physical, and emotional—to achieve well-being for ourselves and others. We recognize our interdependence with other people and with the world in which we live.

REFLECTIVE
We thoughtfully consider the world and our own ideas and experience. We work to understand our strengths and weaknesses in order to support our learning and personal development.

The IB learner profile represents 10 attributes valued by IB World Schools. We believe these attributes, and others like them, can help individuals and groups become responsible members of local, national and global communities.

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Contents

Introduction	1
Why cite	2
What to cite	3
When to cite	4
How to cite	5
Definitions	11
Documentation checklist	14
Elements to be included in the reference	16

Introduction

In the International Baccalaureate (IB) community we produce different types of documents and other forms of work, some of which rely on resources by other people. Following good academic practice, it is expected that we appropriately acknowledge any ideas, words, or work of other people.

This means that, when creating an authentic piece of work, we are expected to:

- undertake research on what is already known
- analyse the research in the context of the work to be produced
- compare and/or contrast existing knowledge against our own findings/thoughts/opinions
- synthesize and present the document in an appropriate way for the expected audience
- acknowledge all contributing sources appropriately.

The ways in which we can acknowledge contributing sources appropriately may vary according to the type of work we produce. Sources are acknowledged differently in a press release or magazine article, in a piece of fiction, in artwork or a musical performance, a slide presentation, film clip or radio broadcast. The important, honest thing for us to do in these and other types of work is to acknowledge our sources and influences in some way. In academic writing, and in any work presented for assessment, not only is it necessary to acknowledge our sources appropriately, but it is regarded as important that the acknowledgments be made using a consistent style. The use of a style guide helps us to ensure this consistency.

When we use other people's words, work and ideas to support our own ideas, or to demonstrate divergent opinion, it is essential that we indicate whose words and work we are using. Any reader would benefit from seeing just how the other person's work contributes to ours.

If we fail to show that we are using someone else's words, work or ideas by not indicating that they originated with someone else, then we mislead the reader. If we give the impression that these words or ideas are our own when they are not, this is not good scholarship and, deliberate or unintentional, may be deemed as academic misconduct.

Purpose of this document

The purpose of this publication is to guide members of the International Baccalaureate (IB) community in understanding the IB's expectations with regards to referencing the ideas, words, or work of other people when producing an original document or piece of work.

This document provides guidance on referencing and demonstrates some of the differences between the most widely used styles. Due to the wide range of subjects, multiple response languages and the diversity of referencing styles, the IB does not prescribe or insist on a particular style. All examples provided in this document are for illustration purposes only. The IB's requirements are for honesty in indicating when and which ideas and words are not the writer's own, and consistency in referencing the source of those ideas and words.

Why cite

Proper citation is a key element in academic scholarship and intellectual exchange. When we cite we:

- show respect for the work of others
- help a reader to distinguish our work from the work of others who have contributed to our work
- give the reader the opportunity to check the validity of our use of other people's work
- give the reader the opportunity to follow up our references, out of interest
- show and receive proper credit for our research process
- demonstrate that we are able to use reliable sources and critically assess them to support our work
- establish the credibility and authority of our knowledge and ideas
- demonstrate that we are able to draw our own conclusions
- share the blame (if we get it wrong).

What to cite

As creators/authors, we are expected to acknowledge any materials or ideas that are not ours and that have been used in any way, such as quotation, paraphrase or summary. The term “materials” means written, oral or electronic products, and may include the following.

- Text
- Visual
- Audio
- Graphic
- Artistic
- Lectures
- Interviews
- Conversations
- Letters
- Broadcasts
- Maps

Basic and common knowledge within a field or subject does not need to be acknowledged. However, if we are in doubt whether the source material is common knowledge or not, we should cite!

When to cite

When we acknowledge the use of materials or ideas that are not ours, the reader must be able to clearly distinguish between our own words, illustrations, findings and ideas and the words and work of other creators.

Style guides give us advice for documenting our sources in written work, but they are less helpful with other formats and mediums. Nevertheless, we can be honest and we can be helpful to our audience(s)—for assessment purposes, this is an expectation.

In written work, we should cite in the text where we have used an external source. The inclusion of a reference in a bibliography (works cited/list of references) at the end of the paper is not enough. However, for pieces of "creative" written work such as writing in the style of an author or genre, for which in-text citation is not usually expected, creative ways of acknowledging the use of other people's work may be permissible. A bibliography or list of references is also expected.

In other forms of work (music, video, artistic pieces), we are expected to acknowledge use of external sources appropriately.

In presentations we can provide our audience with a handout of our references, or list our sources on the final slide(s).

During an oral presentation, we can acknowledge the sources we are using by the use of phrases, for example, "As Gandhi put it …" or "According to …". We can show a direct quotation by saying "Quote … Unquote" or by signalling with "rabbit's ears" or "air quotes". In a presentation supported by posters or slides, we can include short or full references on the slides; if short references are made on the slides, then we should again provide a full list of references on a handout or on the final slide(s).

We can include references or acknowledgments of other people's work in the final credits of a film. A piece of music can be accompanied by programme notes indicating influences and direct sources. Art on display can be labelled or captioned.

How to cite

When we cite, we should make clear what it is that we are citing. It must be clear to the reader just what it is that we owe to someone else, and whether we have quoted exactly or have used our own words and understanding of the original material.

- The reader must be able to distinguish clearly between **our** words/work and the words/work of others.
  - Quotations—the exact words as used by others—are indicated either by quotation marks or by displaying (indenting) the quotation.
  - Paraphrase and summary of others' work should similarly be distinguishable from our own words and ideas.
- Use of a style guide ensures that our citations and references are recorded consistently.
- Choice of introductory or parenthetical citation is often a matter of readability, emphasis and authority.

As noted in the definitions below, the citation in the text links to a full reference that will enable the reader to trace the exact material used.

The three main types of in-text citation are as follows.

1. Author

   In-text citation is done by an introductory and/or parenthetical citation providing:

   - the last name of the author, and
   - page number(s) from which the quotation or paraphrase is taken, if applicable.

2. Author–date

   In-text citation is done by an introductory and/or parenthetical citation providing:

   - the last name of the author, and
   - the year of publication from which the quotation or paraphrase is taken, and the page number, if applicable.

3. Numbered footnote

   In-text citation is done by:

   - superscript note numbers that come after the referenced passage, and after the final punctuation mark, if used, and
   - corresponding footnotes placed at the bottom of their page of reference containing all reference details from which the quotation or paraphrase is taken; when using a source for a second or subsequent time, a shorter footnote reference is sufficient.

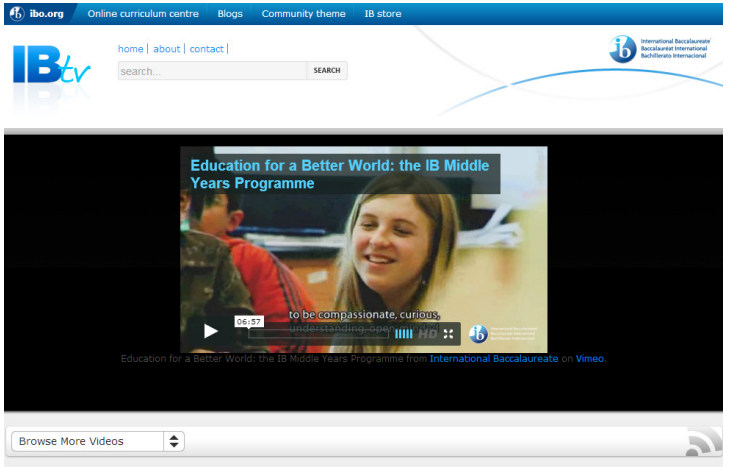
The following section provides examples on how to cite:

- printed sources
- non-printed electronic sources
- online video clips
- social media.

		Citing printed sources	Source material
Quotation	Author	Carroll points out that "deliberate breaches form a relatively small proportion of dishonesty cases whereas up to 80% in most years involve misuse of others' work through plagiarism or collusion" (2).	*Some attempts to gain unfair advantages involve deliberate breaches of the rules. Learners who take devices into examinations, gain unauthorized access to assessment questions, or who hire an impersonator are clearly being dishonest. Because of developments in communication technology, smaller devices can be smuggled in to examination rooms, impersonators are easier to recruit, and hacked questions are more easily available. However, deliberate breaches form a relatively small proportion of dishonesty cases whereas up to 80% in most years involve misuse of others' work through plagiarism or collusion. In these cases, determining whether a learner has acted dishonestly is much more problematic and the role of technology and networked communications in encouraging misuse is also more complex.* **Reference:** Carroll, J. July 2012. *Academic honesty in the IB*. IB Position Paper. http://blogs.ibo.org/positionpapers/files/2013/02/Academic-honesty-in-the-IB.pdf.
	Author–date	Carroll reminds us that "deliberate breaches form a relatively small proportion of dishonesty cases whereas up to 80% in most years involve misuse of others' work through plagiarism or collusion" (2012: 2).	
	Numbered footnote	As Carroll has noted, "deliberate breaches form a relatively small proportion of dishonesty cases whereas up to 80% in most years involve misuse of others' work through plagiarism or collusion".[1] [1] Carroll, J. 2012. *Academic honesty in the IB*. IB Position Paper. http://blogs.ibo.org/positionpapers/files/2013/02/Academic-honesty-in-the-IB.pdf. p 2.	
Paraphrase	Author	While some students still try to bring unauthorized materials into examination rooms with a clear intention to cheat, the vast majority of breaches (80%) relate to plagiarism and collusion; establishing responsibility and intent in such cases is not always easy (Carroll 2).	
	Author–date	Carroll (2012: 2) notes that while some students still try to bring unauthorized materials into examination rooms with a clear intention to cheat, the vast majority of breaches (80%) relate to plagiarism and collusion; establishing responsibility and intent in such cases is not always easy.	
	Numbered footnote	While some students still try to bring unauthorized materials into examination rooms with a clear intention to cheat, the vast majority of breaches (80%) relate to plagiarism and collusion; establishing responsibility and intent in such cases is not always easy.[1] [1] Carroll, J. 2012. *Academic honesty in the IB*. IB Position Paper. http://blogs.ibo.org/positionpapers/files/2013/02/Academic-honesty-in-the-IB.pdf. p 2.	

<table>
<tr><th colspan="2"></th><th>Citing non-printed electronic sources</th><th>Source material</th></tr>
<tr><td rowspan="3">Quotation</td><td>Author</td><td>In declaring that ability to read is “a vital survival skill”, Royce points out that, “when you think about the vast amount of information, written information, that computer technology makes possible, the ability to read becomes ever more important”.</td><td rowspan="6">Reading is important. It is a vital survival skill. Reading, and of course writing, is the basis of learning. Until recently, it was the main method by which people far apart could talk to each other, across the miles or across the years. Even today, reading has advantages not shared by telecommunications or computer technology. And when you think about the vast amount of information, written information, that computer technology makes possible, the ability to read becomes ever more important.

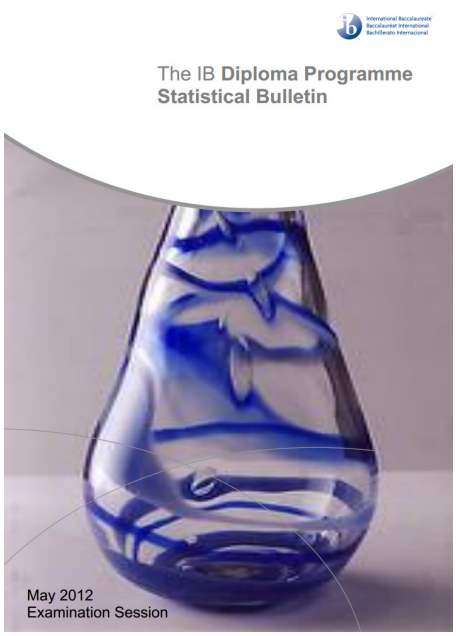
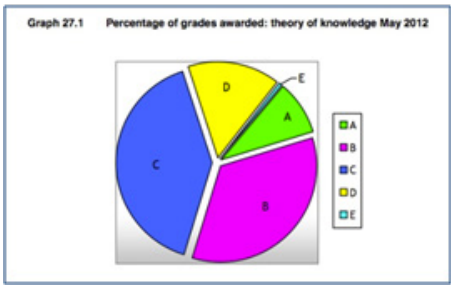
Reference:
Royce, J. 1995. Reading matters: Words, words, words... http://read2live.info/read2.htm. Accessed 30 November 2013.</td></tr>
<tr><td>Author–date</td><td>Royce, suggesting that ability to read is “a vital survival skill”, added, “when you think about the vast amount of information, written information, that computer technology makes possible, the ability to read becomes ever more important” (1995).</td></tr>
<tr><td>Numbered footnote</td><td>In declaring that ability to read is “a vital survival skill”, Royce points out that, “when you think about the vast amount of information, written information, that computer technology makes possible, the ability to read becomes ever more important”.[2]
[2] Royce, J. 1995. Reading matters: Words, words, words... http://read2live.info/read2.htm. Accessed 30 November 2013.</td></tr>
<tr><td rowspan="3">Paraphrase</td><td>Author</td><td>As Royce has suggested, technology has not made obsolete the need for good reading skills; far from it—so much digital text is produced today that ability to read is as important, perhaps even more important, than ever.</td></tr>
<tr><td>Author–date</td><td>As Royce (1995) has suggested, technology has not made obsolete the need for good reading skills; far from it—so much digital text is produced today that ability to read is as important, perhaps even more important, than ever. Almost 20 years later, this remains as true as ever.</td></tr>
<tr><td>Numbered footnote</td><td>As Royce[2] noted, technology has not made obsolete the need for good reading skills; far from it—so much digital text is produced today that ability to read is as important, perhaps even more important, than ever.
[2] Royce, J. 1995. Reading matters: Words, words, words... http://read2live.info/read2.htm. Accessed 30 November 2013.</td></tr>
</table>

		Citing an online video clip	Source material
Quotation	Author	As one student put it, the Middle Years Programme "wants to make you kind of an analytical mind, it wants to make you criticize what you learn, it wants to make you open-minded" (International Baccalaureate).	 **Reference:** International Baccalaureate. May 2010. *Education for a better world: the IB Middle Years Programme* (video). http://blogs.ibo.org/ibtv/?p=327. Accessed 30 November 2013.
	Author–date	As one student put it, the Middle Years Programme "wants to make you kind of an analytical mind, it wants to make you criticize what you learn, it wants to make you open-minded" (International Baccalaureate 2010).	
	Numbered footnote	As one student put it, the Middle Years Programme "wants to make you kind of an analytical mind, it wants to make you criticize what you learn, it wants to make you open-minded".[3] [3] International Baccalaureate. May 2010. *Education for a better world: the IB Middle Years Programme* (video). http://blogs.ibo.org/ibtv/?p=327. Accessed 30 November 2013.	
Paraphrase	Author	Students realize that the Middle Years Programme attempts to make them think more deeply and carefully, to become and to be critical thinkers (International Baccalaureate).	
	Author–date	Students realize that the Middle Years Programme attempts to make them think more deeply and carefully, to become and to be critical thinkers (International Baccalaureate 2010).	
	Numbered footnote	Students realize that the Middle Years Programme attempts to make them think more deeply and carefully, to become and to be critical thinkers.[3] [3] International Baccalaureate. May 2010. *Education for a better world: the IB Middle Years Programme* (video). http://blogs.ibo.org/ibtv/?p=327. Accessed 30 November 2013.	

		Citing social media	Source material
Quotation	Author	Commenting on an update on IB's Facebook page, which proclaimed "Study shows IB graduates are more confident in research activities at the university level", Israel Swanner declared "I can vouch for that. Freshman year at Pacific was EASY compared to senior year in IB".	
	Author–date	Commenting on an update on IB's Facebook page, which proclaimed "Study shows IB graduates are more confident in research activities at the university level", Israel Swanner (2013) declared "I can vouch for that. Freshman year at Pacific was EASY compared to senior year in IB".	
	Numbered footnote	Commenting on an update on IB's Facebook page, which proclaimed "Study shows IB graduates are more confident in research activities at the university level", Israel Swanner declared "I can vouch for that. Freshman year at Pacific was EASY compared to senior year in IB".[4] [4] Swanner, I. 21 November 2013. "I can vouch for that ... " comment on "Study shows IB graduates are more confident ..." The International Baccalaureate Facebook status update. https://www.facebook.com/IBO.org. Accessed 30 November 2013.	
Paraphrase	Author	A well-liked comment on Facebook supports research evidence that the Diploma Programme is an excellent preparation for university (Swanner).	
	Author–date	A well-liked comment on Facebook supports research evidence that the Diploma Programme is an excellent preparation for university (Swanner 2013).	
	Numbered footnote	A well-liked comment on Facebook supports research evidence that the Diploma Programme is an excellent preparation for university.[4] [4] Swanner, I. 21 November 2013. "I can vouch for that ... " comment on "Study shows IB graduates are more confident ..." The International Baccalaureate Facebook status update. https://www.facebook.com/IBO.org. Accessed 30 November 2013.	

Reference:

Swanner, I. 21 November 2013. "I can vouch for that …" comment on "Study shows IB graduates are more confident ...". The International Baccalaureate Facebook status update. https://www.facebook.com/IBO.org. Accessed 30 November 2013.

	Citing an image	Source material
Author	On the other hand, as we can see in Figure 4, very few students score an **E** for theory of knowledge. Figure 4. Percentage of grades awarded: theory of knowledge May 2012	  **Reference:** IB (International Baccalaureate). November 2012. *The IB Diploma Programme statistical bulletin, May 2012 Examination Session*. https://www.ibo.org/facts/statbulletin/dpstats/documents/may_2012_statistical_bulletin.pdf.
Author–date	On the other hand, as we can see in Figure 4, very few students score an **E** for theory of knowledge (IBO, 2012, 40). Figure 4. Percentage of grades awarded: theory of knowledge May 2012	
Numbered footnote	On the other hand, as we can see in Figure 4, very few students score an **E** for theory of knowledge (IBO, 2012, 40). Figure 4. Percentage of grades awarded: theory of knowledge May 2012.[5] [5] IB (International Baccalaureate). November 2012. *The IB Diploma Programme statistical bulletin, May 2012 Examination Session*. https://www.ibo.org/facts/statbulletin/dpstats/documents/may_2012_statistical_bulletin.pdf. P 40.	

Definitions

The words listed here are often used, sometimes interchangeably, in textbooks and in style guides. To support understanding, the terminology in this guide uses the following definitions.

Documentation

Documentation is the stylized process of indicating sources in the text (citation) **and** giving full details (references) to enable another reader to locate the sources.

Style guide

A style guide is a published manual that gives guidance on citation and references to help ensure that our documentation is expressed consistently, and that we include all the elements needed for our sources to be identified.

Some style guides offer more than one set of choices or sub-styles; if we use a particular sub-style, we must be sure to use the same sub-style throughout our work.

As well as advice on citations and referencing, many published style guides give advice on spelling, abbreviations, punctuation, and so on. Many also give guidance on research and on the general writing process.

Style guides in common use in the academic world include the following.

- MLA (Modern Language Association)
- APA (American Pyschological Association)
- Harvard
- Chicago/Turabian
- CSE (Council of Science Editors)
- ISO 690 (International Organization for Standardization)

Note local variations between style guides; writers should be sure to follow a single style guide consistently. When consulted sources are accessed online, the IB prefers the use of URLs (uniform resource locators) or DOIs (digital object identifiers), even if the published style guide makes them optional.

Owing to different editions of style guides, the variety of languages in which members of the IB community complete their work, and diverse subject areas, the IB does not endorse any particular style guide. This choice is left to the discretion of the authors/creators, or their advisers.

For assessment purposes, IB students are not expected to show faultless expertise in referencing but **are** expected to acknowledge all uses of other people's work.

Citation

A citation is an indication (signal) in the text that this (material) is not ours; we have "borrowed" it (as a direct quote, paraphrase or summary) from someone or somewhere else. The citation in the text can be:

- in the form of an introductory phrase, or
- at the end of the statement, or
- indicated by a superscript or bracketed number that leads to a similarly numbered footnote or endnote.

Every citation should be given a full reference that enables the reader to locate the exact source used.

Reference

A reference gives full details of the source cited in the work; the parts or elements of the reference should be noted in a consistent order. Use of a recognized style guide will help ensure consistency, and will also ensure that all required elements are included.

Every reference should be given a citation in the text. If we have looked at a source but not mentioned or cited it in the text, then we do not include it as a reference.

Bibliography/references/works cited

Most style guides require a list of references at the end of the work. This is usually a list, in alphabetical order, of the authors (last name first), whose words and works have been cited in the work. The title of this section varies from one style guide to another.

Each entry in the list of references includes the full information (or as much of it as can be found), expressed in a consistent fashion, which will allow an interested reader to track down exactly where you found the material you have used and cited.

Paraphrase

In writing an essay, we often use our own words to put over someone else's thoughts and ideas. While there are some words that we cannot change (especially the names of people, places, chemicals, and so on), we should use our own words for as much as we can of the rest of the passage. We should also aim to change the structure of the passage, perhaps by reordering the thoughts and ideas.

When we paraphrase, we need to make it very clear where the original author's ideas start and where they finish. If we include our own examples, we should make it clear that these are our thoughts and not those of the original author.

Summary

A summary is a much-shortened summing up of someone else's work. We might summarize a chapter or academic paper, or perhaps even a book, in two or three sentences. Again, although we are using our own words, we must still cite the original source used.

Summaries are often used in a review of the literature—when we sum up what other writers have said or done in investigating a topic or theme.

Quotation

When we use someone else's **exact** words, we quote that original author, and we show this is a quotation by using quotation marks. Longer quotations may be indicated by the use of an indented paragraph (without quotation marks). As well as indicating the words quoted, we must also acknowledge the author by using an in-text citation, the citation in turn linking to a full reference.

Quotations should normally be used sparingly and carefully; essays on literary subjects or from historical documents might include more quotations than other essays.

Documentation checklist

Documentation checklist	
When you have used an author's exact words, have you put "quotation marks" around the quotation **and** named (cited) the original writer? (If you indent your quotation(s), quotation marks are not needed, but the author must still be cited; have you cited your indented quotations?)	
When you put someone else's thoughts and ideas in your own words, have you still named (cited) the original author(s)?	
When you use someone else's words or work, is it clear where such use starts—and where it finishes?	
Have you included full references for all borrowed images, tables, graphs, maps, and so on?	
Print material: Have you included the page number(s) of print material you have used (especially important with exact quotations)?	
Internet material: Have you included both the date on which the material was posted **and** the date of your last visit to the web page or site?	
Internet material: Have you included the URL or the DOI?	
For each citation in the text, is there a full reference in your list of references (works cited/bibliography) at the end? Is the citation a direct link to the first word(s) of the reference?	
For each reference in the list of references (works cited/bibliography) at the end, is there a citation in the text? Do(es) the first word(s) of the reference link directly to the citation as used?	
Is your list of references (works cited/bibliography) in alphabetical order, with the last name of the author first?	

Elements to be included in the reference

	Author(s)/ creator(s)	Chapter/article/ page title	Title	Periodical name	Institution/ publisher and city	URL/DOI		Publication date	Volume/issue number	page number(s)	Database name	E-reader/device	Edition	Editor(s)	Date accessed
Book	Yes		Yes		Yes			Yes					If applicable		
Chapter from book (essays, readings, etc)	Yes	Yes	Yes		Yes			Yes		Yes			If applicable	If applicable	
Online book	Yes		Yes		Yes	Yes		Yes					If applicable		
E-book	Yes		Yes		Yes			Yes				Yes	If applicable		
Newspaper/ magazine article	If available	Yes		Yes				Yes		Yes					
Journal paper	Yes	Yes		Yes				Yes	Yes	Yes					
Electronic newspaper/ magazine article	If available	Yes		Yes				Yes		If available	If applicable	If applicable			
Electronic journal paper	Yes	Yes		Yes		Yes		Yes	Yes	If available	If applicable	If applicable			
Internet/web page	If available	Yes	Yes		If applicable	Yes		If available							Usually
Internet site	If available		Yes		If applicable	Yes		If available							Yes
Image/graph/ graphic	If available		Yes		If applicable	If applicable		If available							If applicable
Video	If available		Yes		If applicable	If applicable		If available							If applicable
Blog	Yes	Yes	Yes			Yes		If available							Yes

This page lists elements (probably) necessary in the full reference in the list of references, list of works cited or bibliography. At least enough information needs to be given to enable the source material to be tracked down and identified when different editions, issues, versions or formats are available. It is permissible to use common sense when deciding which elements to include for types of media not listed here—in such cases correctness may not be possible: completeness and consistency are the desirable features.