# Chapter 4: Documentation and Citation

## Objectives

Upon completion of this chapter, readers will be able to

1. Cite borrowed information ethically and professionally.
2. Decide what to document, even if the information seems like common knowledge or comes from non-traditional sources like product brochures or personal conversations.
3. Correctly apply the APA documentation style, including in-text citations and creating an alphabetized reference list for various source types like books, journal articles, and websites.
4. Use cross-referencing effectively to improve the clarity, navigation, and user autonomy of a technical document.

## Citing Sources of Borrowed Information

When you write a technical report, you can and should borrow information, but you must document it to be ethical. If your report makes you sound like a seasoned scientist but does not contain source citations, readers will question the report’s validity. However, if you properly cite your sources (those little indicators that show that you are borrowing information and from whom), readers will approve. A documented report with source indicators informs readers that you’ve done your homework, are knowledgeable about the field, approach things professionally, and respect the rights of the original authors and owners of the intellectual property you’re using.

The following resources will provide guidance to correctly document, or give credit to, your sources. Remember to choose the system of documentation your professor assigns.

* [Research and Citation Resources](https://owl.english.purdue.edu/owl/section/2/). Overview from the Purdue OWL with links to specific systems.
* [APA Documentation](http://library.austincc.edu/help/APA/). From Austin Community College.
* [MLA Documentation](http://library.austincc.edu/help/MLA/). From Austin Community College.
* [Turabian Documentation](http://library.austincc.edu/help/TURABIAN/). From Austin Community College.
* [CSE Documentation: Name-Year Method](http://library.austincc.edu/help/CSE/CSE-ny.php). From Austin Community College.
* [CSE Documentation: Citation-Sequence System](http://library.austincc.edu/help/CSE/CSE-cs.php). From Austin Community College.
* [IEEE Citation Style Guide](https://libguides.murdoch.edu.au/IEEE). From Murdoch University. (The IEEE system is very similar to the system described in the following.)

### What to Document

How do I decide when to document information—when, for example, I forgot where I learned it from, or when it really seems like common knowledge? There is no neat, clean answer. If it isn't common knowledge for you, at least not yet, document it! If you simply can't recall how you came by the information, then it has safely become common knowledge for you. If you know you read it during your research process, you need to document it.

One other question that is often asked: Do I document information I find in product brochures or that I get in conversations with knowledgeable people? Yes, most certainly. You document any information you did not create, regardless of whether it is in print, in electronic bits, bumper stickers, or in an advertisement. Failing to document your sources is a very serious issue in a university setting where research should not only be useful but also to be trustworthy.

### APA Style Documentation System

If you've taken other college writing courses, you may be familiar with documentation styles like MLA (Modern Language Association), which is commonly used in literature and the humanities. However, when writing in the social sciences, education, nursing, or technical fields, the APA (American Psychological Association) documentation style is often required. That means that while in your English composition and literature courses you likely used MLA, in your technical communication classes you may instead be asked to use APA. APA style emphasizes author-date citation—which helps readers quickly identify the source and its recency, making it ideal for fields that rely on current research.

#### In-Text Citations in APA

In APA, when you borrow information (such as a quote, summary, or paraphrase) from a source, you include the author's last name and the year of publication in parentheses directly in the text. Here are some examples of APA in-text citations:

**Paraphrased:** Climate change is accelerating due to industrial emissions (Smith, 2022).

**Quoted with page number:** According to Smith (2022), “carbon levels have reached a historic high” (p. 45).

**Two authors:** (Jones & Taylor, 2021)

**Three or more authors:** (Lee et al., 2020)

#### Reference List in APA

At the end of your document, you include an alphabetized reference list with full publication details for every source you cited.

The best way to learn APA formatting is by studying examples. Below are examples of APA citations for books, journal articles, government reports, websites, personal communication, and brochures. These follow the 7th edition of the *Publication Manual of the American Psychological Association* (2020).

##### 📘 Books

**Format:** Author, A. A. (Year). *Title of the book in italics.* Publisher.

Gates, H. L. Jr. (2021). *The Black church: This is our story, this is our song.* Penguin Press.

##### 📄 Journal or Magazine Articles

**Format:** Author, A. A.. & Author, B. B. (Year). Title of the article. *Title of the Periodical, volume number*(issue number), page range. <https://doi.org/xxxxx>

Jasanoff, S. (2014). A mirror for science. *Public Understanding of Science, 23*(1), 3-15. <https://doi.org/10.1177/0963662513505509>

**Note:** If there’s no DOI, use a URL if the article was found online, or omit it if you used a database.

##### 🧾 Government and Organization Reports

**Format:** Author or Agency Name. (Year). *Title of the report* (Report No. xxx). Publisher. URL.

National Academies of Sciences, Engineering, and Medicine. (2023). *Accelerating decarbonization in the United States: Technology, policy, and societal dimensions.* The National Academies Press. <https://doi.org/10.17226/25932>

##### 🌐Webpages and Online Sources

**Format:** Author, A. A. (Year, Month Day). Title of the page. *Website name.* URL.

American Psychological Association. (2020, October 14). *What is APA Style*. <https://apastyle.apa.org/style-grammar-guidelines/citations>

**Note:** Do not include a retrieval date unless the content is likely to change (e.g., a wiki page).

##### 🗣️ Personal Communications (e.g., Interviews, Emails)

**In-Text Only:** Personal communications are not included in the reference list because they cannot be retrieved by others. Instead, cite them in-text only.

(E. J. Smith, personal communication, June 6, 2024).

##### 📄 Product Brochures or Pamphlets

**Format:** Company Name. (Year). *Title of brochure or pamphlet* [Brochure]. Publisher or Company.

John Deere. (2022). *5E Series Utility Tractors* [Brochure]. Deere & Company. <https://johndeere.widen.net/s/nkjqt8w6nh/202206_2543306_5e-cab-update-pod-brochure>

### Final Notes on APA Reference Lists

* Entries should be listed in alphabetical order by the first author's last name.
* Use a hanging indent for each entry (the second and subsequent lines are indented).
* Italicize titles of books, journals, and webpages—but not article or chapter titles.
* For up-to-date citation rules, consult [APA Style website](https://apastyle.apa.org) or the *Publication Manual of the APA (7th ed.)*.

Documenting borrowed graphics: It's certainly legal to copy graphics from other sources and use them in your own work—as long as you document them. You indicate the source of a borrowed graphic in the figure title (caption), which is located just below the graphic. In the figure title, in APA format, you cite the graphic just as you would a text-based source.

## Cross-Referencing

In technical writing, cross-referencing refers to directing readers to other parts of the same document—or to external resources—where they can find related or supporting information. It’s a powerful way to improve clarity, navigation, and user autonomy in complex documents such as manuals, reports, or instructions.

### Why Use Cross-References?

Cross-references help readers in several important ways:

* To find more basic information: If the user lands in a section that’s too advanced, you can guide them back to introductory material (e.g., “For a basic overview of smart home device connectivity, see Section 2.1”).
* To find more advanced details: If the reader is already familiar with the basics, a cross-reference can direct them to in-depth explanations or supplementary data.
* To find related information: Not all readers follow your content in a linear manner. Cross-references let them jump to connected topics when it makes sense for their specific needs.

### Example

Imagine you're writing a technical manual for setting up a smart home ecosystem. In the section on configuring a smart thermostat, you'd likely cross-reference to:

* The section on setting up your home Wi-Fi network (since connectivity is essential)
* A later section on voice assistant integration (for users who want hands-free temperature control)
* External links to the manufacturer's firmware update guide or energy savings best practices hosted online

You might write:

For help setting up your smart home Wi-Fi network, see Section 3.2: Network Configuration.

If you’re looking to integrate the thermostat with Alexa or Google Assistant, continue to Section 5.1: Voice Assistant Integration.

For more details on optimizing your thermostat’s energy settings, visit EnergyStar’s Smart Thermostate Guide.

### Internal vs. External Cross-References

* Internal cross-references point to another section, figure, or table within the same document. These should be labeled clearly (e.g., “see Table 4.2” or “refer to Appendix B”).
* External cross-references point readers to a credible source outside the document—such as a technical article, a website, a video tutorial, or a product support page.

### Final Note

Cross-referencing keeps your writing clean and focused without overwhelming the reader with too much detail in one place. It also shows your awareness of user needs at different levels of expertise—beginners, intermediate users, and advanced readers alike. Just be sure that all referenced sections are clearly labeled and that any external links are stable and credible.

For details on creating graphics and then incorporating them into a document, see the section on graphics in this guide on page 16.

*In this internal cross-reference, the section is referenced generically. It’s standard to cite the page number in internal cross-references.*

For details on creating graphics and then incorporating them into a document, see “Graphics” in the *Online Technical Writing Guide*.

*The title of the chapter is in double quotation marks. The title of the book that the chapter occurs is italicized.*

For details on creating graphics and then incorporating them into a document, see the chapter on graphics in the *Online Technical Writing Guide*.

*If you don’t want to cite the exact titles of the chapter, just use lowercase.*

For details on creating graphics and then incorporating them into a report, see “Brighten Up That Monthly Report!” in the *Office Information Newsletter*.

*If you cite an article in a periodical, put the article in quotation marks and italicize the name of the periodical.*

## Activities and Exercises

* Locate several journals in your major field and find the information for the writer’s section. What formatting protocols are expected if you want to be published?
* In small groups, visit the Purdue OWL Research and Citation Section and explore it. What can you learn about the different formatting styles? When would you use APA?  MLA?  IEEE?  Chicago?

## Attribution

This chapter is revised from the first edition of *Open Technical Communication*, Chapter 5.6: “[Libraries, Documentation, and Cross-Referencing](https://alg.manifoldapp.org/read/open-technical-communication/section/d9202f07-41a2-4dc9-8b29-486e164c1775)” by David McMurrey and Cassandra Race, which is openly available under a Creative Commons Attribution license.

The content in Chapter 5.6 of the first edition of *Open TC* was originally sourced and revised from David McMurrey’s *Online Technical Writing*, section titled “[Researching Libraries, Documenting Borrowed Information, Cross-Referencing](https://mcmassociates.io/textbook/infoov.html),” which is openly available under a Creative Commons Attribution license.

## AI Assistance Notice

Some parts of this chapter were brainstormed, drafted, and/or revised in conversation with ChatGPT 4o and Google Gemini 2.5 Flash. All AI-generated content was reviewed and revised as needed by a human author.