MLA (Style) Lite for Research Papers
Modern Language Association Style for Research Papers by Dr. Abel Scribe PhD - Fall 2009

MLA Lite by Dr. Abel Scribe PhD is a concise guide to crafting college research papers in the style of the Modern Language Association (MLA). It conforms to the MLA Handbook for Writers of Research Papers, 7th ed., (2009), with additional features drawn from the pages of the MLA’s own journal, PMLA (Publications of the Modern Language Association). MLA Lite is an introduction to the essential features of the style.

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4.0. Text Citations. Acknowledging sources referenced in the text.
5.0. Works Cited. The list of references cited in the text.
Appendix A: Block Format with Headings.
Appendix B: Copyright & Fair Use.

1.0 MLA Handbook & Style

The defining characteristic of a research style is its form of documentation, its style of references and text citations. The Modern Language Association uses a hybrid, author-page style of parenthetical (in parentheses) text citation combined with a Chicago style bibliography format for references. Other styles using parenthetical citations follow an author-date format (e.g., the American Psychological Association). The MLA style of documentation is easy to use and well documented.

The MLA Handbook is affordable with a price under $20, possibly less at amazon.com (the link is on our website at www.docstyles.com/mlaguide.htm along with Doc's review). With the print edition you also get a secret scratch code that allows you access to the MLA website at www.mlahandbook.org.

"The Web site [sic] includes the full text of the print volume (with over 200 additional examples), several research project narratives, sample papers, and additional resources" (MLA rear cover).

MLA style in general. The defining characteristic of a research style is its form of documentation, its style of references and text citations. The Modern Language Association uses a hybrid, author-page style of parenthetical (in parentheses) text citation combined with a Chicago style bibliography format for references. Other styles using parenthetical citations follow an author-date format (e.g., the American Psychological Association). The MLA style of documentation is very easy to use and becomes nearly intuitive with a little practice.

The English language lacks conventions for a variety of things. For example, when do you write numbers as words and when as numerals? Do you write “twenty-one” or “21.” Do you write the “twentieth century,” or “Twentieth Century,” or “20th century,” or “20th Century?” MLA would have you write “twentieth century” (MLA 84). Only the more essential rules are featured in MLA Lite. Any guide to standard usage will generally serve for the rest. Note, petty details are important only to the most pedantic professor. With these nuances use the form comfortable to you, with one over-riding principal, be slavishly consistent on whatever form or usage you choose. If you elect to use US style dates (an option in MLA style, MLA 83), for example “April 1, 2009,” use that format throughout your text including references. If you opt for the universal format preferred in MLA style, “1 April 2009,” that format must be used exclusively in your text. Be consistent!

MLA foibles & silliness. The MLA Handbook is prone to excess through changing editions. An earlier edition (5th) presented an elaborate scheme for presenting quotations. This was rescinded in the (6th) edition, but a comparably excessive scheme for referencing electronic sources was introduced. This in turn is gone with current edition, but with more silliness (adding the medium of publication to all references). The Handbook also has a passion for abbreviations (it even devotes a chapter to the subject), a passion that most journals using the style happily ignore. It serves no useful purpose and can have some unpleasant phrasing, such as “U Chicago P” (You Chicago Pee) for University of Chicago Press. Consider these as charming eccentricities. More seriously, the Handbook omits the state where a book is published in its references. This is unacceptable. While New York is globally known, what about Springfield (there are many) or Redmond, or Englewood Cliffs?

FBI Warning! You are welcome to print, link, or distribute MLA (Style) Lite for Research Papers for not-for-profit educational purposes. Instructors are encouraged to use the guide in their classrooms. No additional permission is required. MLA Lite is revised on a regular basis; you are invited to link directly to the document rather than post it to another site. FBI Warning: Plagiarism is naughty!

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1.1 PMLA ENHANCEMENTS

Dumbing down the style. The MLA Handbook leaves out a number of features found in every style manual for research papers, most notably, the use of headings, subheadings, and lists. What is even worse, the MLA uses these features in their own flagship publication, PMLA (Publications of the Modern Language Association). Apparently they have determined that these features are appropriate when used by advanced scholars, but too sophisticated for mere students. Doc Scribe holds that a style is first and foremost what is printed in research publications, not what is described in a style manual or handbook.

Pedantic professors may disagree. This creates a dilemma for students. Do you use the true style, or the dumbed-down version in the MLA Handbook? Both are featured in MLA Lite. The best advice is to stick to the limitations of the Handbook when the style itself is the content of the exercise; use the PMLA enhancements when the content of the paper is the focus, not the style. If you are writing a serious paper is it not appropriate to use the same style that serious scholars use when publishing articles in PMLA?

1.2 COMMON RULES

There are a few basic features that recur throughout MLA style that might be missed if mentioned only in one section of MLA Lite.

Capitalization. There are two styles of capitalization used with headings and titles of articles and books.

- Sentence capitalization capitalizes a title as you would a sentence, capitalizing the first word and proper nouns.
- Heading capitalization capitalizes all words except articles (e.g., a, an, the, etc.), prepositions (e.g., as, in, of, to, etc.), and conjunctions (e.g., and, but, for, or, etc.). The term is not found in the MLA Handbook—it is an adaptation of the term headline capitalization for its use in newspaper headlines (see, Chicago Manual of Style 366-367).

Space after punctuation. Previously the MLA Handbooks would have you space once after punctuation at the end of a sentence. Now you may space once or twice unless your grade-giver objects (MLA 78, 116). Be consistent!

Version of record. When citing the work of others—referencing sources—serious scholars prefer to cite the version of record, typically the print version of an article or book. The MLA Handbook gives the impression that all sources are equal and equivalent. That is simply not true. Printed books and articles are typically subjected to peer review, favorably evaluated by experts of specialists in the field before they are allowed to be published. Everything else is of an uncertain quality, something to keep in mind when drawing on casual sources from the Internet.

2.0 FORMAT OF THE RESEARCH PAPER

Easy to Read? The goal of any research style is clarity of communication. “Effective writing depends as much on clarity and readability as on content” (MLA 49).

- Page numbers are required on every page. The page header is the author's last name. These go inside the margin space, one-half inch from the top of the page, next to the right margin.
- Margins. One inch margins are required on all four sides of a page. This applies to all pages, and the contents of all pages, but excludes the page number/header.
- Justification? “Do not justify the lines of text at the right margin; turn off your word processor’s automatic hyphenation feature” (MLA 116). Hyphens introduced to break words and wrap lines can confuse a reader.
- Typeface (fonts). The MLA Handbook expresses no clear preference, though sample pages feature a sans serif typeface (e.g., Arial, Helvetica). A 10- or 12-point type mirrors traditional typewriter typefaces, and are acceptable. The Handbook no longer prefers underlining wherever you might use italics.
- Double-space lines throughout the text! Space twice after punctuation at the ends of sentences; space once after colons.
- Dates may follow US format (e.g., April 1, 2009) or universal format (1 April 2009). The Handbook gives you the choice, but be consistent, including references. The preference is for the universal format.
- Title. The title is centered on the page and formatted in heading caps (see Section 3.5 for the rule).
- Indents. Indent paragraphs one-half inch, except block quotes. Indent block quotes one inch. There are special rules for indenting block quotes that run beyond a single paragraph (see Section 3.4).
- Block quotes are required when a quote exceeds four lines in your paper. Indent the quote one inch, paragraphs in block quotes a quarter-inch more.
- Endnotes are preferred, place before the works-cited list. Footnotes go inside the margins with the text.
- Title page ID block. This is an essential feature of MLA style—do not improvise!
2.1 Title & Text Pages

The research paper in MLA style begins with a distinctive title page, an MLA trademark. Text pages follow the same general form.

Fig. 1. Basic format and features of MLA style. The ID Block—name, instructor, course, date—must be presented exactly as shown.

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2.2 PMLA Style Headings & Lists

- No headings? The MLA Handbook has no instructions for using headings or subheadings, but the style applied in the MLA’s own journal, PMLA, does. The austere format should be acceptable to most instructors.

The MLA Handbook makes no provision for headings (or “subheadings” if you prefer) in research papers. However, the MLA’s own journal, PMLA, does. About half the articles make use of headings, following one of two styles.

[ I ]

The first style uses roman numerals placed inside brackets to indicate a change in the flow of the text. This style is so austere that most instructors can hardly object; a student need only explain they are just following the example of the MLA’s own journal.

[ II ]

The second style is a bit more ambitious, as shown in the following section. This style is widely shared by many major research styles, as featured in the Publication Manual of the American Psychological Association (APA) and other style guides.

Fig. 2. PMLA style austere (sub)headings. The headings are roman numerals set inside brackets. There is just a single level with this heading style.

Fig 3. PMLA style conventional (sub)headings, with the bold font added for emphasis. There are three levels with this heading style used in the order shown. This style is widely shared with other popular styles, such as that of the American Psychological Association.
Lists (seriation). Seriation is a technique to itemize or enumerate the parts to a series or an argument. This can be helpful when the parts are complex, elaborate, or disparate. It is particularly useful in constructing a transition paragraph to introduce a series of topics. Chicago style refers to this as a process of enumeration.

Sentence seriation. A series or list of terms or phrases can be introduced following a colon: (1) marked by numbers in parentheses; (2) to enumerate a series of topics; (3) especially when the topics differentiated are complex, lengthy, or disparate. The MLA Handbook is silent on this practice, but recent papers in PMLA also use numbers.

Paragraph seriation. If each element in the series requires a separate paragraph, these are set flush with the left margin with each paragraph indented and numbered appropriately. An introductory clause or sentence ending with a colon typically introduces the series:

1. This form of seriation is useful in detailing and summarizing an argument, or perhaps the results of a research study in the conclusion.
2. Each element in the series may contribute to the general topic with extensive commentary.
3. But as a practical matter, this form of seriation is not particularly common in research papers. When the elements require this form of elaboration it is more common to set them under their own subheadings in the text, perhaps following sentence seriation in a transition paragraph under a major heading.

No Bullets! Chicago advises “the use of bullets (heavy dots) in place of enumeration is sometimes resorted to, but these may be considered cumbersome, especially in scholarly work” (314).

2.3 TABLES, FIGURES, & EXHIBITS

Tables and illustrations are rare in MLA publications. The MLA Handbook has very little to say about tables and illustrations, devoting just two and a half pages to the topic. The APA (American Psychological Association) Publications Manual addresses the subject in fifty-five pages; the Chicago Manual of Style devotes fifty pages. If you are crafting a large complex table refer one of these manuals, tables in these styles are virtually identical to MLA style. Illustrations, figures and exhibits, require just a caption. There is no guidance in the Handbook for graphs. The APA Manual has much to say on the subject if you need help.

<table>
<thead>
<tr>
<th>Field</th>
<th>1980</th>
<th>2000</th>
<th>% Change</th>
<th>% Male</th>
</tr>
</thead>
<tbody>
<tr>
<td>Biological Sciences</td>
<td>3,636</td>
<td>4,867</td>
<td>33.9</td>
<td>44.7</td>
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<tr>
<td>Computer Science &amp; Engineering a</td>
<td>2,747</td>
<td>6,167</td>
<td>55.5</td>
<td>84.4</td>
</tr>
<tr>
<td>Education</td>
<td>7,314</td>
<td>6,830</td>
<td>-6.6</td>
<td>35.4</td>
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<tr>
<td>Language &amp; Literature b</td>
<td>2,049</td>
<td>2,543</td>
<td>24.1</td>
<td>41.2</td>
</tr>
<tr>
<td>Mathematics &amp; Natural Science</td>
<td>3,852</td>
<td>5,124</td>
<td>33.0</td>
<td>74.6</td>
</tr>
</tbody>
</table>


aEnglish language, literature, and modern languages.
bComputer science and all engineering disciplines.

Fig 4. Tables. The source note is formatted with a hanging indent, table notes are formatted as indented paragraphs (MLA 119).

Number tables consecutively as they appear in your text.

• Each table must have a label beginning with the table number and describing the contents. The label needs to inform the reader what the table presents (coefficients, means, percentages, rates, etc.), the time frame, and the coverage (e.g., United States, Illinois, Cook County, Chicago, South Side).
• Each row and column must have a heading. Subheadings may be used to expand or clarify headings. MLA tables may use symbols in column headings, e.g., % or $.

• A general note is the first note below the table. If the contents of a table are drawn or adapted from a published source, note that as a source note as shown in figure 5. A special format is used (see Attribution below).

• Add footnotes to explain specific features of the table contents, such as units of measure (e.g., population in 1000s). These are labeled with superscript letters (e.g., a, b, c, etc.), to avoid confusion with numbered text endnotes or footnotes (if any), and placed below the source note or general table note.

The more information that is put in a table the harder it is to read. Readers rarely study tables. “An informative table supplements—it does not duplicate—the text” (APA 84).

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Ex. 1. Opening measures of *O Come All Ye Faithful*.

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Fig. 5. Illustrations: figures and exhibits.

Number figures and exhibits consecutively throughout your text, independently from tables (each has their own number sequence). Musical scores are presented as “exhibits,” captioned Ex. 1, Ex. 2, etc., numbered independently of figures.
Attribution. When tables and illustrations are borrowed a reference to that source is required. The table or illustration may be mentioned in the text in cited in the same manner as any other source and referenced in the works-cited list at the end of the paper. When this is not the case, a source note must be added as a table note or appended to the caption. A special format is required, although this is not documented in the Handbook, merely shown in examples. The format was featured in an appendix to the previous edition.

Book (Musical Score)


Article

2.4 ENDNOTES & FOOTNOTES
Historically, MLA style frowned on the use of notes, though many journals using the style employ endnotes. The previous edition of the MLA Handbook even had an appendix featuring a special format for references in notes (and for sources referenced in table or figure notes). This is gone. The MLA Handbook now explains the use of two types of endnotes or footnotes: bibliographic notes and content notes (MLA 230–232). 1

1 Bibliographic notes enable an author to refer readers to sources not directly cite in the text for additional information. For example, the MLA Handbook is a popular style guide for research papers as are the APA Publication Manual, the Chicago Manual of Style, and Kate Turabian’s venerable Manual for Writers of Research Papers. Each of these sources must be listed in the works-cited list. However, a parenthetical citation in the text is also acceptable: There are several popular style guides (e.g., APA Publication Manual, Chicago Manual of Style, Turabian’s Manual for Writers). This is illustrated in the MLA Handbook (216).

2 Content notes let an author present a useful digression that might otherwise disrupt the main theme of the text. Journals using notes appear to favor endnotes. Whether as endnotes or footnotes the format is that of an indented paragraph, marked with a superscript number in the text and note, with each numbered note starting a new paragraph. Notes are numbered consecutively through the text. Footnotes are placed within the margins, that is, sharing the text space (not the margin space). Endnotes go before the list of works cited.

3.0 MECHANICS OF WRITING (TEXT RULES)
A long chapter in the MLA Handbook, coincidentally chapter 3, bears the title “Mechanics of Writing.” This includes common English usage for punctuation and spelling as well as rules unique to MLA style. Only the essential text rules are featured and abridged in MLA Life.

3.1 ABBREVIATIONS
“Abbreviations are used regularly in the list of works cited and in tables but rarely in the text of a research paper (except within parentheses). In choosing abbreviations, keep your audience in mind. While economy of space is important, clarity is more so. Spell out a term if the abbreviation may puzzle your readers” (MLA 234).

• Never begin a sentence with a lowercase abbreviation. Avoid beginning a sentence with an acronym.
• Common Latin abbreviations such as etc., e.g., and i.e. may be used only in parentheses. In the text write for example (e.g.); and so forth (etc.); that is (i.e.).
• Spell out the names of countries, states, counties, provinces, territories, bodies of water, mountains, in the text.
• Most prefixes to places, such as Fort, North, Port, South, are spelled out in the text; as are suffixes such as Peak or Fork. Write: North Platte, Fort Collins, Port Huron, South Bend, Long’s Peak.
• When writing initials, the traditional format is still preferred—put a period and a single space after each. For example, write: J. S. Bach, E. E. Cummings, C. S. Lewis, J. R. R. Tolkien.

Acronyms/Initialisms. “The trend in abbreviation is to use neither periods after letters nor spaces between letters, especially for abbreviations made up of all capital letters” (MLA 234). For example, write: CA, PhD, MLA, CD-ROM, US, UK.

• If an acronym is commonly used as a word, it does not require explanation (IQ, LSD, FBI, ESP).
• A term must be fully written the first time it is used, thereafter just the acronym is used.
• If an acronym is not familiar use an expanded abbreviation; for MLA write Mod. Lang. Assn.
• Use two-letter postal codes for US states and Canadian provinces in references only (GA, PQ, etc.).
• Write the plural form of an acronym without an apostrophe (e.g. some MBAs command high salaries).
3.2 **Italics (Underlining) & Quotation Marks**

**Italics.** The MLA *Handbook* no longer recommends underlining where italics might be used. *Add italics to a word or phrase only the first time it is used, thereafter use plain text.*

- Emphasize a keyword or phrase in your text by placing it in italics. The next time the term or phrase is used it should be in plain text.
- Use italics for the titles of books and the names of periodicals in your text and references.
- Use italics for "words and letters that are referred to as words or letters" (MLA 78). For example, write “The term *American Indian* is inclusive of over 500 Federally recognized ethnic communities.”
- Use italics for non-English words or terms used in your text. For example, "*Ya-te-hay* is a form of greeting in the Diné (Navajo) language.” This practice excludes those words that have become incorporated in the English language, such as laissez-faire, or arroyo.

**Within quotations.** Emphasis may be added to a word or phrase in a quotation by placing it in italics. When this is done the note [emphasis added] or [italics added] must be inserted in brackets at the end of the quotation (within the quotation marks), or if the emphasis comes at the end of the sentence, in parentheses outside the quotation marks.

"Place quotation marks around a word or phrase given in a special sense or purposefully *misused*" (emphasis added, MLA 75).

**Quotation marks.** Use quotation marks other than for quotes only in the following circumstances:

- "Place quotation marks around a word or phrase given in a special sense or purposefully misused” (MLA 75). For example, The Population Council criticized the "outrageous" position of the Church on birth control.
- Use quotation marks to enclose a translation of a non-English term in your text. *Addis Ababa*, the name of the capital of Ethiopia, is literally translated "new flower.”

NB: “If introduced unnecessarily, this device can make writing heavy-handed” (MLA 76).

3.3 **Numbers & Dates**

- **Numbers.** If your topic makes little use of numbers, “you may spell out numbers written in one or two words” (MLA 81). Otherwise, use arabic numerals. Write: *one*, *five*, *twenty-one*, *one hundred*, *eighteen hundred*, but write 5½, *101*, *3,810*. If your writing contains the recurrent use of numeric statistical or scientific data, use numerals for those numbers.
- Hyphenate compound numbers from twenty-one to ninety-nine, compounds with a number as the first element (e.g., three-way lightbulb), and the written form of fractions.
- When numbers or a date are required to open a sentence, write them out. For example: "Five girls and 125 boys tried out for the varsity soccer team.” If you can, rewrite the sentence.
- Do not mix numbers that are spelled out with symbols, write out the term for the symbols as well. For example, write: 45%, or forty-five percent; $20 or twenty dollars.
- Do not mix numerals with written numbers when they refer to similar things. For example, "Only 10 of the 150 people on the tour (not ten of the 150 tourists) were willing to visit the city after the riot.” But also write: "The President got 1.3 trillion of the 1.6 trillion dollar tax cut he proposed.”
- Use numerals with symbols and abbreviations (e.g., %, $, c. ft., lbs., p.m., ed. vol.) when these appear frequently in your text or are used in references. For example, write: 25%, $25, 50 lbs., 3rd ed., vol. 5. Otherwise write out numbers with measures in your text (but not in references) when you can do so in three words or less, twenty-five percent, twenty-five dollars, fifty pounds.

**Ordinal numbers** follow the general rules for numbers. For example, "The window for applications was the third to twenty-third of August.” But use numerals if more than two words are needed to write the number. For example, the *Statistical Abstract of the United States* is in its 124th edition. Use only numerals in references (e.g., 2nd ed.).

**Inclusive range of numbers.** MLA style drops digits in numbers above 99 according to specific rules. This is the process of *eliding* a range of inclusive numbers.

- When writing numbers through 99 give the full digits. For example, write 42-48 not 42-8.
- Page numbers above 99 require only the last two digits of the second number as long as the result is unambiguous. Leading zeros are not dropped in MLA practice. Write pages 1123–24 not 1123–1124; write pages 2000–04 not 2000–4 nor 2000-2004. Write pages 112–35 and pages 102–21, but write pages 102–08 not 102–8.
- Write pages 1,584–621 not pages 1,582–1,621, and certainly not pages 1,584–21.
- Elide dates only when they fall within the same century. Write the years 1865-1917 not 1865-917.
NB> When expressing a range of numerals in text do not use a dash unless the numbers reflect an inclusive range of dates, write “to” instead. For example, “The IQ range of the first group was 86 to 112.” But also write “The years of the Great Depression, 1930–40, tested America severely.”

Full dates when written in the text may be in US format: month day, year (e.g., August 21, 2001); or in universal or European format, day month year (e.g., 21 August 2001). Be consistent throughout the text.

NB> References typically use the day-month-year format; sample references in the MLA Handbook and MLA Lite use this format.

3.4 QUOTATIONS

- Direct quotes must be placed in quotation marks or indented as a block quote. All quotations must include a citation referring the reader to the source document. As a matter of form, quotations should flow with your text, and may be edited to do so. MLA Lite covers only the basics in showing how to quote the work of others, the MLA Handbook further discusses how to quote from works of poetry, and plays or movies.

  - “The accuracy of quotations in research writing is extremely important” (MLA 92). “Direct quotations must reproduce exactly not only the wording but the spelling, capitalization, and internal punctuation of the original” (CMS 357–358).

  - “If you quote material in a foreign [sic] language, you must reproduce all accents and other marks exactly as they appear in the original (école, pietà, tête, leçon, Fährä, año)” (MLA 66).

  - If you quote material that contains a citation to another work, include this citation in your quotation. The work cited does not have to be included in the list of works cited if it is cited only in the quotation.

“Quotations are effective” in research papers when used selectively. Quote only words, phrases, lines, and passages that are particularly interesting, vivid, unusual, or apt, and keep all quotations as brief as possible. Overquotation can bore your readers and might lead them to conclude that you are neither an original thinker nor a skilful writer” (MLA 92).

Quotations in running text. Shorter quotations, most quotes in research writing, are embedded directly in the text. Place quotes in running text inside quotation marks. Do not use the abbreviation “p.” for “page.”

  - When the author is introduced in the text the page number follows the quotation. Smith reported that “the creature walked like a duck and quacked like a duck” (23).

  - Without an introductory phrase, the author and page are placed together. For example— It was reported that “the creature walked like a duck and quacked like a duck” (Smith 23).

  - When citing a quote drawn from several pages in the source, separate page numbers in the citation with commas. For example, write (Thoreau, Walden 23, 129-31, 144).

Block quotes are required with longer quotations. “If a quotation extends more then four lines when run into the text” set it off as a block quote (MLA 94). Block quotes are continuously indented from the left margin one inch. Double space within, before, and after a block quote. Do not place the quote inside quotation marks.

  - “If you quote only a single paragraph or part of one, do not indent the first line more than the rest” (MLA 94).

  - “If you need to quote two or more paragraphs, indent the first line of each paragraph an additional quarter inch. . . . If the first sentence quoted does not begin a paragraph in the source, however, do not indent it the additional amount. Indent only the first line of successive paragraphs” (MLA 94).

The first paragraph of a block quote— whether it was indented in the original or not— is not indented if only one paragraph is quoted. But if two or more paragraphs are quoted, then all paragraphs begin with an indent— in addition to the one inch block quote indent— if they were indented in the original.

NB> Paragraph indents in block quotes are one-quarter inch, half the standard indent.

Add text to a quotation. It may be helpful to add text to merge a quote with the flow and tense of your text, to add emphasis, or to clarify the original. Brackets are required to indicate material or emphasis added to a quote. For example: "They [the Irish Republican Army] initiated a cease fire.”

Emphasis may be added to a word or phrase in a quotation by placing it in italics. When this is done the note (emphasis added) or (italics added) must be added after the quotation marks (see MLA 101).

Correct errors. Obvious typographical errors in a quote may be corrected. But for an unusual word choice or spelling it may be best to note the original is being quoted faithfully. This is done by inserting the Latin term sic (thus), in italics or underlined, in brackets within the quotation (but in parentheses at the end of a quote), immediately following the term. For example, “The ship struck an iceberg and floundered (sic), with the loss of all on board.” Or write “The ship struck an iceberg and floundered” (sic). (Note, to flounder is to thrash about wildly. To founder is to fill with water and sink.)
The Modern Language Association (MLA) has evolved a crisp modern style that reflects "the customs of a community of writers who greatly value scrupulous scholarship and the careful documentation . . . of research" (Franklin xv, in Gibaldi). Though it has its foibles, compared to other styles it is remarkably uncluttered and easy to use. Among its foibles are the fairy complex rules for formatting long quotations as block quotes:

- If a quotation runs to more than four lines in your paper, set it off from your text by beginning a new line, indenting one inch [emphasis added] . . . from the left margin, and typing it double-spaced, without quotation marks. A colon generally introduces a quotation displayed this way . . . sometimes the context may require a different mark . . . or none at all . . . .
- If you need to [block] quote two or more paragraphs, indent the first line of each paragraph an additional quarter inch. If the first sentence quoted does not begin a paragraph in the source, however, do not indent it the additional amount. (Gibaldi 111; MLA 94)

There are additional rules to follow when quoting poetry, plays, or translating a quotation. In these instances, the MLA Handbook is an essential guide.

Fig. 6. Short and long quotations. The style uses three indents: (1) a standard half-inch indent to start paragraphs in the main text, (2) a full one-inch indent for block quotes, and (3) a one and one-quarter inch indent beginning some paragraphs inside block quotations.

Editing quotations. Capitalization and punctuation may be freely changed to merge a quote into the text, but "a quotation should never be presented in a way that could cause a reader to misunderstand the sentence structure of the original source" (MLA 97). Examples are drawn from the paragraph below.

Effective writing seeks to merge a quotation into the flow of the text. It is not necessary to indicate the minor changes needed to do so. The reader should not stumble over a quote. Edit a quotation according to the following rules.

- If a quote begins in what is mid-sentence in the original, the first letter of the first word may be uppercased to open a sentence. Write: "Merge quotations into . . . " (not "[M]erge quotations. . .").
- A quote that begins with a capital letter in the original may be lowercased to match the syntax without noting the change. For example, good writers know that "the reader should not stumble over a quote."
- The punctuation mark at the end of a quote may be changed to fit the syntax. Please note, a "reader should not stumble over a quote!" But, "if the [original] quotation ends with a question mark or an exclamation point . . . the original punctuation is retained" (MLA 103).
- Double quotation marks may be changed to single quotation marks, and the reverse.

Delete parts of quotes. Ellipsis points are used to indicate text omitted from a quotation. Three ellipsis points (periods with a single space before, between, and after each period) indicate material has been omitted within a sentence or at the end of a sentence. Unless clarity demands it, do not use ellipsis points to begin a quotation. For example, Henry David Thoreau asserts:

"To be a philosopher is not merely to have subtle thoughts, nor even to found a school, but to so love wisdom as to live according to its dictates, a life of simplicity, independence, magnanimity, and trust" (Thoreau 15, ch. 1).

An omission within the quote is edited:

"To be a philosopher is not merely to have subtle thoughts, . . . but to so love wisdom as to live according to its dictates, a life of simplicity, independence, magnanimity, and trust" (Thoreau 15; ch. 1).

"If a parenthetical reference [citation] follows the ellipsis at the end of your sentence, . . . use three periods with a space before each, and place the sentence period after the final parentheses" (MLA 98).
“To be a philosopher is not merely to have subtle thoughts, nor even to found a school, but to so love wisdom as to live according to its dictates . . .” (Thoreau 15; ch. 1).

Delete entire sentences. If the original text reads:
This is a delicious evening, when the whole body is one sense, and imbibes delight through every pore. I go and come with a strange liberty in Nature, a part of herself. As I walk along the stony shore of the pond in my shirt-sleeves, though it is cool as well as windy, and I see nothing special to attract me, all the elements are unusually congenial to me” (Thoreau, Walden, 90; ch. 5).

Omitting a full sentence:
“This is a delicious evening, when the whole body is one sense, . . . As I walk along the stony shore of the pond in my shirt-sleeves, though it is cool as well as windy, and I see nothing special to attract me, all the elements are unusually congenial to me” (Thoreau 90).

Omitting the end of one sentence, and the next:
“This is a delicious evening, when the whole body is one sense, . . . As I walk along the stony shore of the pond in my shirt-sleeves, though it is cool as well as windy, and I see nothing special to attract me, all the elements are unusually congenial to me” (Thoreau 90).

Omitting text from the middle of one sentence to the middle of another:
“This is a delicious evening, when the whole body is one sense, . . . though it is cool as well as windy, and I see nothing special to attract me, all the elements are unusually congenial to me” (Thoreau 90).

Delete the beginning of a sentence. The leading portion of a sentence opening a quotation may be omitted from the quotation without indicating an omission as long as the original meaning is not marred.

3.5 TITLES OF WORKS & HEADINGS (CAPITALIZATION)
- Capitalization in MLA style is mostly conventional, with the exceptions noted below. Generally, specific designations are capitalized, as in the American West. But more general designations--or designations used as adjectives--are lowercased: The western United States, eastern Europe.
  • The names of ethnic or racial groups are capitalized if they represent a geographical region or language group. For example, Hispanic, Asian, African American, Appalachian.
  • Terms based only on color, direction, size, habitat, customs, or local usage are usually lowercased.

NB> When in doubt, and when a good guide to grammar and usage is no help, follow whatever practice appeals to you but be consistent throughout your text!

Heading caps. “The rules for capitalizing are strict. In a title or subtitle, capitalize the first word, the last word, and all principal words, including those that follow hyphens in compound terms” (MLA 86). These are commonly referred to as heading caps. Do not capitalize the following unless they begin a title or follow a colon:
  • Articles: a, an, the.
  • Prepositions: against, between, in, of, to.
  • Conjunctions: and, but, for, nor, or, so, yet.
  • Infinitive: to.

Sentence caps capitalize just the first word, the first word after a colon, and any proper nouns in a heading or title.
  • Use heading caps for the titles of books and articles used in the text and in references.
  • Use heading caps for major headings in your paper (except run-in headings).
  • Use sentence caps for titles of most non-English works.
  • Use sentence caps for lower level run-in or paragraph subheadings.

NB> MLA style uses heading caps for the titles of sources—books, chapters, or articles—both in references and in the text. Titles in French, German, Italian, Spanish, or Latin are more conventionally rendered in sentence caps (capitalize the first word, proper nouns [according to the convention of the language], and first word after a colon).

4.0 TEXT CITATIONS
MLA style use a parenthetical form of text citation. Unlike the author-date format used in the social sciences and psychology, MLA style place only the author’s name—and the page number when citing a direct quote—in the citation. The MLA Handbook notes two basic rules to follow when citing sources:
1. “References in the text must clearly point to specific sources in the list of works cited.” (MLA 214).
2. “Identify the location of the borrowed information as specifically as possible.” (MLA 215) Cite the specific chapter, act and scene, or section of a work when appropriate.

What to cite? Cite all direct quotations as well as significant ideas, concepts, or findings borrowed or adapted from others. The MLA Handbook warns that “forms of plagiarism include the failure to give appropriate acknowledgment when repeating or paraphrasing another’s wording, . . . another’s argument, or when presenting another’s line of thinking” (MLA 56).
What not to cite. It is generally not necessary to cite: (1) dictionary definitions of words unless the specific dictionary is relevant to the context; (2) well documented historical facts; (3) conventional knowledge or knowledge broadly shared in a discipline.

4.1. Basic Citation Format

Each separate referent to a source must be cited however many times this may occur in a paper. "To avoid interrupting the flow of your writing, place the parenthetical reference where a pause would naturally occur (preferably at the end of a sentence), as near as possible to the material documented" (MLA 217). A page number is usually cited only with a direct quotation unless the reader needs to be referred to an unusual concept or idea for possible verification.

An introductory phrase leads into a direct quotation by placing the author’s name in the text. The page citation in parentheses then follows the quotation. For example: Smith stated “now is the time to run for the gold” (123). As a matter of style it is helpful to the reader to integrate citations into the flow of your text. This is an important consideration in MLA style.

If there is no introductory phrase cite both the author and page in parentheses. For example: One expert observed that “the creature quacks like a duck” (Smith 123).

<table>
<thead>
<tr>
<th>Source</th>
<th>Citation</th>
<th>Source</th>
<th>Citation</th>
</tr>
</thead>
<tbody>
<tr>
<td>No Author</td>
<td>(Book Title 123) (“Article Title” 123)</td>
<td>Corporate</td>
<td>(Modern Language Association 123)</td>
</tr>
<tr>
<td>1 Author</td>
<td>(Smith 123)</td>
<td>Literary</td>
<td>(King Lear 4.1) (Thoreau 11; ch.1)</td>
</tr>
<tr>
<td>2 Authors</td>
<td>(Smith and Jones 123)</td>
<td>Multiple</td>
<td>(Adams 11; Baker 21; Chavez 123)</td>
</tr>
<tr>
<td>3 Authors</td>
<td>(Smith, Jones, and Garcia 123)</td>
<td>Two Works</td>
<td>(Thoreau, Walden 8) (Thoreau, “Life” 9)</td>
</tr>
<tr>
<td>4 Authors+</td>
<td>(Smith et al. 123)</td>
<td>Volume/Page</td>
<td>(Burton 2: 123)</td>
</tr>
</tbody>
</table>

Fig. 7. Parenthetical text citations.

1. No Author? Substitute the title of the work (title of an article or book) for the author in both the reference list and text citation. The first word in the citation must be the first significant word (ignore a, and, the) in the title as used to alphabetize the reference in the list of works cited. If the title is long use a short form or just the first word.

2. Two or Three Authors. Cite both authors’ names: (Smith and Jones 123). When there are two or more authors with the same surname repeat the surname for each author. For example, write (Smithe, Smithe, and Smithe 123).

3. Four or More Authors. You may cite the lead author plus et al. in all text citations (see MLA 215). Be consistent in whatever practice you adopt, and consistent in matching the text citation with the entry in the reference list.

4. Multiple sources are cited enclosed in a single set of parentheses. List sources alphabetically in the order they appear in the reference list. Each citation is separated by a semicolon. For example, write (Alt 12; Brown 23; Car 123; Dean 123–46; Smith 99).

5. Multiple works by one author require the short title of the specific work to be added to the citation (See MLA 225). For example, write (Thoreau, Walden 123) to contrast the source of a quote from another work by Thoreau (Thoreau, “Life Without Principle” 23).

6. Corporate Author. Cite the full name of the group or institution as given in the reference list entry.

The MLA Handbook offers no examples of acronyms used in references or citations.

4.2 Literary Citations

MLA style makes special provision for the repeated citation of literary works. "In a reference to a commonly studied prose work, such as a novel or play, that is available in several editions, it is helpful to provide more information than just the page number" (MLA 226). The objective is to help a reader with an edition different from the author’s to find the same passage. MLA style distinguishes between prose books and plays and verse books, plays, and poems.

Prose works. MLA style wants writers to identify a source as specifically as may be reasonable. The style for doing this takes two forms, one for prose works, another for verse. Prose works cite the page followed by a semicolon, then additional identifying information.

- Chapter. Cite the page followed by a semicolon, then additional identifying information. For example, in Walden Henry David Thoreau claimed “the mass of men lead lives of quiet desperation” (111; ch. 1). This same passage is found on different pages in other editions, but always in the first chapter (Thoreau 111; ch. 1).
- Volume. Anthologies and other longer works often come in several volumes. “When citing a volume number as well as a page reference for a multivolume work, separate the two by a colon and a space: (Wellek 2: 1–10)” (MLA 222).
5.1 B

When citing a specific page, the page number is understood to come after the volume. For example: "Few Moslems contemplate for the first time the Ka'abah [sic], without fear and awe: there is a popular jest against new comers, that they generally inquire the direction of prayer" (Burton 2: 161).

When citing an entire volume, add the abbreviation "vol." to the citation. For example, in his _Personal Narrative of a Pilgrimage to Al-Madina and Meccah_, he includes a detailed account of a clandestine visit to Mecca in 1853 (Burton, vol. 2).

When citing an entire volume with the reference in the text, spell out volume. For example, "Burton provides an exacting account of his clandestine visit to Mecca in volume 2 of _Personal Narrative of a Pilgrimage to Al-Madina and Meccah_" (159–258).

**Verse works** are cited in a manner many will find unconventional. MLA style advises use of a decimal notation system.

- The following passage is from the Bible: "For whosoever shall call upon the name of the Lord shall be saved." This is found in the book of Romans, Chapter 10, verse 13. MLA style cites this (Rom. 10.13). Conventional notation cites this (Rom. 10:13).

- The following passage is from the _Merchant of Venice_ (MV). Shylock is speaking: "I'll have my bond; speak not against my bond; I have sworn an oath that I will have my bond. . . ." MLA cites this (MV 3.3). Conventional notation might cite this (_Merchant of Venice_, act III, sc. iii).

**NB:** The MLA _Handbook_ cautions that "some instructors prefer roman numerals, . . . but if your instructor does not require this practice, use arabic numerals (King Lear 4.1), [rather than (King Lear IV.i) or (King Lear act IV, sc. 1)]" (227).

### 5.0 WORKS-CITED LIST

**Place references** on a new page under the centered heading "Works Cited" (in heading caps one inch below the top of the page just inside the top margin). Continue the page numbering from the previous page. The list of works cited comes after the text and endnotes (if any); it is the last part of your paper. Reference only what you cite in the text and cite in your text every entry in the reference list.

The MLA _Handbook_ instructs students to double space everything, including references. When formatting a paper for presentation (or other than class use), the more compact block paragraph spacing is appropriate: single space within references, double space between them.

- **Arrange references alphabetically** by author, if there is no author by title (ignore _A_, _An_, _The_, and equivalents). "The alphabetical order of names is determined by the letters before the commas that separate last name and first names. Spaces and other punctuation marks [and case] are ignored" (MLA 131).

- Use a hanging indent, with the indent one-half inch from the left margin.

- **Give authors’ full names** (first, middle, last) when possible. “You may spell out a name abbreviated [to initials] . . . if you think the additional information will be helpful to readers” (MLA 149). Fill in the names in brackets.

- List up to three authors to a work; with four or more authors, note the first plus "et al."

- Multiple works by the same author list **alphabetically by title, not by date.** MLA style approximates a three-em dash with three hyphens followed by a period. Use this "three-em dash" in place of the author’s name in subsequent works by the same exact author(s).

- **All titles are set in heading caps** (except languages where sentence caps are customary). Titles of articles, reports, and chapters in edited books are placed in quotes. Titles of books and volumes, and the names of journals, are underlined or placed in italics.

### 5.1 BASIC RULES FOR REFERENCES

- Titles of works that stand alone, (e.g., books, films, monographs, reports, webpages) are usually underlined (or placed in italics). The titles of works that are parts of something (e.g., books, journals, encyclopedias) are usually placed in quotation marks. For an uncommon source, such as a personal interview, see the _Handbook_.

- The MLA _Handbook_ makes an obsession of using abbreviations in references (see MLA chap. 7). Many authors and journal editors dispense with the more esoteric of these in print.

- Use decimal notation to indicate issue number in a journal volume, that is, volume four, number two is written “4.2” not the more conventional "4(2)."

- Reprinted works require the original publication date as well as the date the reprint was published. The original publication date comes after the title.

- The day-month-year format, 1 April 2010, is preferred.

- The MLA _Handbook_ offers no examples of acronyms used in references or citations.

- Line wrap URLs by breaking them after a slash. Do not insert a hyphen!

- The medium of publication must be noted in all references (e.g., CD, PDF file, Print, Web).
5.2 ARTICLES IN JOURNALS, MAGAZINES, & NEWSPAPERS

Research journals are typically paged consecutively from issue to issue—if the previous issue ended at page 101 the next would start at page 102. This makes it superfluous to reference the number of an issue in a volume, a volume typically being a year. Nonetheless, MLA style asks that you note the volume and issue number in all references using the decimal format unique to the style, volume.issue.

- Double space references.
- Article titles are in heading caps inside quotation marks. Languages not English use native capitalization.
- The name of the periodical is in italics.
- Cite the volume and issue for journals, just the date for newspapers and magazines.
- Elide page number ranges, that is, drop digits when feasible. For example, write 1134-56 rather than 1134-1156.

**Journal Articles**


Citations: (Dietler 123); (Dumper 123); (Solé 123); (Dietler 123; Dumper 123; Solé 123)

**NB>** Note the volume and issue number in all references using the decimal format unique to MLA style, volume.issue (e.g., 96.3; 21.4; 4.1).

**NB>** If there are quotation marks in a title these are changed to single quotes. The article by Solé is in Spanish and is capitalized according to the conventions of that language. Several sources can be noted in a single citation, each separated by a semicolon.

**NB>** Citations with multiple authors list alphabetically: (Dietler 123; Dumper 123; Solé 123).
Two Authors - Paged by Issue

Citation: (Kelley and Francis 123)

Three Authors

Citation: (Thwaites, Taviner, and Grant 123)

Four or More Authors - Annual Review

Citation: (Rivara et al. 123)

NB> With four or more authors you may list all authors or just the lead author, *and others* (et al.).

Corporate/Group Author (Magazine)

Citation: (Editorial Staff of the *Smithsonian* 123)

No Author - Review

Citation [no author]: (Rev. of *Anthology of Danish Literature* 123)

Newspaper & Magazine Articles


Citations: (Curry 123); ("Feds" 123); (Hall 123); (Curry 123; "Feds" 123; Hall 123)

NB> If the locale of a publication is not evident from its name and likely to be unfamiliar to readers add that information in brackets.

Reviews

Citation: (Camhi 123)

NB> A review may have a title different from the work being reviewed. That title goes in quotes in references..

3. BOOKS & COMPILATIONS

Compilations combine features of references to articles and to books. When referencing a part of a compilation the title of the part goes in quotes, the title of the compilation is in italics. Both titles are in heading caps: page numbers are required.

Anthology/Compilation: Part-Chapter/Complete Volume


Citations: (Hemingway 123); (Jung 123); (Whitman 123); (Hemingway 123; Jung 123; Whitman 123)

One Author: Translation-Initials/Editor


Citations: (Eco 123); (Tolkien 123)
Two Authors

Citation: (Bourdieu and Passeron 123)

Three Authors - Edition Other Than First

Citation: (Booth, Colomb, and Williams 123)

Corporate Author: Government Publication-Edition Other Than First

Citation: (Bureau of the Census 123)

Multiple Works

Citations: (Follett, *Lie Down* 123); (Follett, *Pillars* 123)

NB> A 3-em dash is used to list multiple works by the same author after the first reference. The MLA Handbook instructs you use three dashes followed by a period, not the em dash of your word processor. List in the order they appear in the works-cited list, alphabetically by title,

Title as Author (No Author)

Citation: (*MLA Handbook* 123)

Edited Book

Foreword, Afterword, Introduction, Preface

Citation: (Nichols 123)

Language Other Than English

Citation: (Hadot 123)

Reprint

NB> The original publication date of a reprint usually goes immediately after the title.

Citation: (Arendt 123)

Multivolume Work - Reprint

Citation: (Burton 123)

Translator as Author

Citation: (French 123)
5.4 Monographs & Reference Works

Dictionary


Citation: (American Heritage 123); ("Occams Razor" 123)

Dissertation


Citation: (Pfingstag 123)

NB> "To cite a master’s thesis, substitute the appropriate label (e.g., MA thesis, MS thesis) for Diss. (MLA 180).

Encyclopedia


Citation: (Bregman 123)

Government Report


Citation: (Taylor 123)

5.5 Common Nonprint Sources

Articles in Journals, Magazines, & Newspapers. References to electronic sources follow the same format as those to print sources, with additional information. The MLA Handbook no longer asks that URLs be included in references to online sources (182). However, if the URL is included it should lead directly to the page. An access date is required with or without a URL in all references where the Web is designated the medium.

Online Journal


NB> References to these electronic journals follow MLA notation style in numbering the issue in the respective volumes, 2.3 (volume 2, issue 3) and 8.3. The second has numbered paragraphs in the original.

NB> Line wrap URLs by breaking them after a slash (or before a period). Do not insert a hyphen!

Citations: (Barry 123); (Bowers 123)

Online Facsimile of a Print Journal - PDF File


Citations: (Fine 123); (Weber 123)

Newspaper & Magazine Articles


Citations: (Adams 123); (Cordi 123); (“Don’t Spoil” 123); (Jonsson 123); (Sterritt 123)

Books & Compilations. There is a vast amount of classical literature no longer protected by copyright laws. The more familiar works are readily available in print, but some works are quite rare. If these works are also available in a print edition it may be helpful to note that if the information is readily available. Some of the information shown in the sample references may not be readily. The objective of any reference is to lead the interested reader to the source. The title and URL may meet that basic need.

Book Online


Citation: (Thoreau 123)

Part of a Compilation


Citations: (Thoreau, Walden 123); (Thoreau, “Life” 123)

Web Source with Print Publication - Initials


Citation: (Rolt and Pseudo-Dionysius 123)

Monographs, Reports. & Websites

Dr. Abel Scribe PhD. MLA (Style) Lite for Research Papers. Fall 2009. PDF file.


Citations: (Dr. Abel 123); (“Using Modern” 123); (Walt Whitman 123)

NB> “Dr. Abel Scribe PhD” is a group or corporate name, not that of an actual person.

5.6 WORKS OF ART & PERFORMANCE

Performance/Recording


Citations: (Beethoven); (Boskovsky); (Strauss); (Dances); (Greene); (Pink Floyd, *Dark Side*); (Pink Floyd, “Any Colour”); (Pink Floyd, *Dark Side*; “Any Colour”)

**Play/Score**


**Visual**


**WORKS CITED**


APPENDIX A: BLOCK FORMAT WITH HEADINGS

MLA style confers a profoundly “rough draft” quality to research papers. Another popular style, that of the American Psychological Association (APA) forgoes that roughness when advising how to format college papers.

<table>
<thead>
<tr>
<th>First M. Lastname</th>
<th>Lastname 1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Professor Adams</td>
<td></td>
</tr>
<tr>
<td>Humanities 101</td>
<td></td>
</tr>
<tr>
<td>1 April 2009</td>
<td></td>
</tr>
<tr>
<td><strong>Centered Title in Heading Caps</strong></td>
<td></td>
</tr>
<tr>
<td>The MLA page format may be extended to reflect journal practices and common conventions. These include the use of headings, single spacing within block quotes and references, and indenting block quotes just one-half inch rather than specified one inch.</td>
<td></td>
</tr>
<tr>
<td><strong>First Level Heading</strong></td>
<td></td>
</tr>
<tr>
<td>The first paragraph after a heading or subheading is not indented. Subsequent paragraphs are indented one-half inch.</td>
<td></td>
</tr>
<tr>
<td>Block quotes are required when the quote exceeds four lines, indented one-half inch from the left margin.</td>
<td></td>
</tr>
<tr>
<td>To be a philosopher is not merely to have subtle thoughts, nor even to found a school, but to so love wisdom as to live according to its dictates, a life of simplicity, independence, magnanimity, and trust. (Thoreau, Walden, ch. 5, 15)</td>
<td></td>
</tr>
<tr>
<td><strong>Second level heading.</strong></td>
<td></td>
</tr>
<tr>
<td>This is often called a run-in or paragraph heading. This is one of several heading styles used by the journal PMLA. The subheading may be set in italics or a bold font, or both. Be consistent!</td>
<td></td>
</tr>
</tbody>
</table>

Fig. 9. PMLA headings with block paragraph spacing.

Headings. The headings in Figure 9 are shared by PMLA (Publications of the Modern Language Association) and the APA Publication Manual. In descending order, these start with a centered heading (in heading caps), a side head (in heading caps), and a run-in or paragraph heading (in sentence caps). A bold font is added to make the headings stand out on the page.

Properly employed, headings provide an outline of the work.

Block spacing. Everything in MLA style is double-spaced. However, the APA Publication Manual notes:

Double-spacing is required throughout most of the manuscript. When single-spacing would improve readability, however, it is usually encouraged. Single-spacing can be used for table titles and headings, figure captions, references (but double-spacing is required between references), footnotes, and long quotations [this is sometimes referred to as block spacing]. (APA, 2003 326)

There is no sanction for this combination of features in MLA style, although other styles are quite comfortable with them. These are features that might be used by advanced students, or by those writing for a broader community than an undergraduate classroom.
APPENDIX B: COPYRIGHT & FAIR USE

You Cannot Copyright a Style. By law (17 U.S.C. 102(b)) "the original and creative word sequences in [a text] are protected by copyright, but a writing style itself is in the public domain, no matter how original it is" (The Copyright Handbook, 3rd ed., by Stephen Fishman, 1998, Berkeley, CA: Nolo Press). You cannot copyright a research (or any) style, nor can you copyright a language, even a programming language. They belong to everyone.

The rationale for this is not hard to understand. If, for example, you wrote a book and stored it on your PC in Microsoft Word, would it then belong to Microsoft? After all, it’s in their word processor format and style. How about copyrighting all the works in the style of William Shakespeare, the style of painting of Rembrandt, or even that of Rock’n Roll? If you could secure a copyright on a style, then you would own the copyright on everything published in that style. More recently the courts have denied copyright protection to programming languages, even those invented by Microsoft and IBM!

Fair Use. Copyright laws provide for the fair use of copyrighted material for educational purposes, reviews, and scholarship. The following is reproduced from the U.S. Copyright Office website:

One of the rights accorded to the owner of copyright is the right to reproduce or to authorize others to reproduce the work in copies or phonorecords. This right is subject to certain limitations found in sections 107 through 118 of the Copyright Act (title 17, U. S. Code). One of the more important limitations is the doctrine of "fair use." Although fair use was not mentioned in the previous copyright law, the doctrine has developed through a substantial number of court decisions over the years. This doctrine has been codified in section 107 of the copyright law.

Section 107 contains a list of the various purposes for which the reproduction of a particular work may be considered "fair," such as criticism, comment, news reporting, teaching, scholarship, and research. Section 107 also sets out four factors to be considered in determining whether or not a particular use is fair:

1. the purpose and character of the use, including whether such use is of commercial nature or is for nonprofit educational purposes;
2. the nature of the copyrighted work;
3. the amount and substantiality of the portion used in relation to the copyrighted work as a whole; and
4. the effect of the use upon the potential market for or value of the copyrighted work.

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The 1961 Report of the Register of Copyrights on the General Revision of the U.S. Copyright Law cites examples of activities that courts have regarded as fair use: "quotation of excerpts in a review or criticism for purposes of illustration or comment; quotation of short passages in a scholarly or technical work, for illustration or clarification of the author’s observations; use in a parody of some of the content of the work parodied; summary of an address or article, with brief quotations, in a news report; reproduction by a library of a portion of a work to replace part of a damaged copy; reproduction by a teacher or student of a small part of a work to illustrate a lesson; reproduction of a work in legislative or judicial proceedings or reports; incidental and fortuitous reproduction, in a newsreel or broadcast, of a work located in the scene of an event being reported."

Copyright protects the particular way an author has expressed himself; it does not extend to any ideas, systems, or factual information conveyed in the work.

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"APA policy permits authors to use . . . a maximum of three figures or tables from a journal article or book chapter, single text extracts of fewer than 400 words, or a series of text extracts that total fewer than 800 words without requesting formal permission from APA" (APA, 2009 173).