



IUM Actuality



IUM Author Guidelines (4th edition, revised and updated)

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No. 7 (4th Ed., rev. and updated)

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IUM Author Guidelines **(4th edition, revised and updated)**

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IUM Research and Development Center

May 2022

The publication *IUM Actuality* aims to publish electronically on the IUM website, essays or opinion articles on current security and defense topics, as well as works on relevant topics and of added value for the Institute's praxis, preferably authored by IUM professors. researchers from CIDIUM or other national or foreign researchers, at the invitation of the Director or on his own initiative.

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Introductory note

This publication is a revised and updated version of IUM Actuality No. 7, *IUM Author Guidelines* (3rd edition, revised and updated) by Fachada, Ranhola, Marreiros and Santos (2020).

This new version of IUM Actuality, *IUM Author Guidelines* (4th edition, revised and updated) makes the structure and organization of the chapters / subchapters / sections of the articles to be submitted more flexible. Nevertheless, the two guiding objectives of the previous edition remain the same. The first stated goal of IUM Actuality No. 7 was to serve as a guide for researchers who wish to submit their work / studies to the consideration of the IUM Research and Development Centre (Pedrouços) for publication in one of its Editorial Lines (*Portuguese Journal of Military Sciences*, “*ARES*” Collection, *IUM Notebooks* and *IUM Actuality*) in case of approval. The second was to provide a source for consultation by military personnel / auditors conducting research work for the courses administered at the IUM.

The guidelines presented here are fundamentally practical:

- They explain how to write the References and in-text citations (direct and indirect citations) according to the IUM version of the APA Standard (2013);
- They are consistent with the following framing documents:
 - *Orientações metodológicas para a elaboração de trabalhos de investigação* (Santos & Lima, 2019);
 - The IUM’s *Normas de Execução Permanente / Investigação* [Standing Operating/Research Procedures] (NEP/INV)¹: NEP/INV – 001(A1), which aims to *establish standards and procedures for Research Work conducted within the scope of courses that do not award an academic degree*; and NEP/INV – 003(A2), which *outlines the structure, citation and referencing styles for the written works prepared at the IUM*, issued, respectively, on September 2020 and on April 2022.

¹ These internal regulations (NEP/INV 001 and 003) are periodically revised; nevertheless, all share the same fundamental approach to the contents they aim to define / standardise.

1. Author guidelines applicable to all Editorial Lines of the IUM Research and Development Centre (CIDIUM)

1.1 General guidelines

The works submitted to the Editorial Lines must should be sent by email to the respective addresses (listed in subchapters 2.1 to 2.4).

The integrity and accuracy of the work, as well as the opinions expressed in the published texts are the sole responsibility of the author(s). The works must be submitted in a Word document or compatible format. Works that include figures, tables, charts, or contents taken (directly or indirectly) from other publications must be accompanied by an identification of the source, be duly referenced in the body of the text (in the previous paragraph), and attached in a separate, clearly labelled editable file.

The author(s) grant the IUM, through a non-exclusive licence, the right to publish the work in any format, including making it available in the Institution's Repository. This does not mean that the author(s) cannot publish it in other Open Access Repositories, or in another format, upon agreement with the IUM.

The submitted works must be original and unpublished, as stated in the Declaration of Honor, and must comply with the *Publishing Ethics Guidelines and Responsibilities of the Portuguese Journal of Military Sciences (PJMS)*.

All texts submitted to the Editorial Lines of the IUM Research and Development Centre (CIDIUM) through the email addresses listed below (sub-chapters 2.1, 2.2, 2.3 and 2.4) are subject to analysis and review.

1.2 General organisation of the text

The works should generally be organised as follows:

- 1.2.1 Title in Portuguese and English.
- 1.2.2 Abstract in Portuguese and English, not exceeding 200 words (optional for the *IUM Actuality* Editorial Line). The abstract should briefly present the study problem / objective; the study methodology; the findings; the most relevant conclusions.
- 1.2.3 Keywords in Portuguese and English, which should not include more than six items (words or phrases; optional for the *IUM Actuality* Editorial Line).
- 1.2.4 Body of the text (chapters, subchapters, and sections).
- 1.2.5 Reference list at the end of the work, consistent with the IUM Author Guidelines and the examples below. This section must be titled "References"; it should not include subchapters and only works cited in the text should be listed.

- 1.2.6 Appendices, Annexes, and Attachments, when applicable, appear at the end of the work, numbered as a separate sequence using Arabic numerals, and cited in the text. These elements are defined as follows (NEP/INV 003(A2), 2022, p. 7):

Annexes: detailed data retrieved from sources not elaborated or altered by the author, which serve to clarify certain aspects of the work; the Annexes must be cited in the body of the text;

Appendices: documents prepared or altered by the author containing complementary information that broadens or explains certain aspects of the text or the annexes;

Attachments: complete documents not prepared by the author, received by military correspondence or attached to a service document issued for a specific purpose.

1.3 Formatting

- 1.3.1 The text alignment should be justified and the font should be Times New Roman, size 12, at 1.5 spacing, with 3 cm (left) and 2.5 cm (top, bottom, and right) margins and a paragraph indent of 1.0 cm.

- 1.3.2 The work should be formatted in a simple style, that is, without hyperlinks, automatic indexing and other similar resources.

- 1.3.3 Italics, underlining and bold:

- 1.3.3.1 Italics may be used to highlight parts of the text, but this should be done sparingly; otherwise they might not achieve the desired effect.

Italics may be used in the following situations:

- In the (full) title of literary works, newspapers, magazines, journals and similar publications;
- In the names of ships, aircraft, brands, etc.;
- In epithets and bynames;
- In the titles of artistic works and works of art (films, paintings, musical pieces, sculptures, etc.);
- In letters that represent variables;
- In the scientific names of animals or plants;
- In foreign words inserted in the text;
- In Latin phrases and other foreign expressions that have not been assimilated into current English.

- 1.3.3.2 Underlining and bold are mainly used when transcribing citations where the original text is underlined / in bold. They may be used in

other cases, but this should be done sparingly; otherwise they might not achieve the desired effect.

- 1.3.4 Footnotes versus endnotes. Endnotes (or footnotes) may be used to elaborate on topics mentioned in the work that do not require in-text explanation. The font used in the footnotes should be Times New Roman, size 10, single spacing, no indentation.
- 1.3.5 Curved and straight brackets. In direct citations use: curved brackets where they occur in the source text; straight brackets to insert ellipses or words added by the author.
- 1.3.6 Bullets. Avoid using different bullet types for the same level and use neutral characters such as the dash for the first level and bullet points for the second level.
- 1.3.7 To facilitate reading, the numbering and formatting of chapters, subchapters, sections, and subsections should follow the structure / formatting outlined in Table 1.

Table 1 – Titles, subtitles, and sections

| Numbering | Formatting |
|---|--|
| 1. [Chapter title] 1.1 [Subchapter title] 1.2 2. [Chapter title] 2.1 [Subchapter title] 2.1.1 [Section title] 2.1.2 2.1.2.1 [Subsection title] (...) | 1st level title: Times New Roman, size 12, bold. 2nd level title: Times New Roman, size 12, bold, indented (aligned with 1st level title). 3rd level title: Times New Roman, size 12, indented (aligned with 2nd level title). 4th level title: Times New Roman, size 12, indented (aligned with 3rd level title). (...) |

- 1.3.8 Number abbreviation. Use the letter “N” followed by the letter “o” and a dot, as follows: No.;
- 1.3.9 Legal references. Should be written out as in the following example: Pursuant to Article 11(1)(c) of Decree-Law No. 99/2022 of 06 July, “it is now mandatory to [...]”.
- 1.3.10 Units of measurement. Units of measurement should follow the International Measurement System (IMS) as provided for in Decree-Law No. 128/2010 of 03 September. Measurements of length, height, weight, and volume should be

expressed using the metric system (metre, kilogram, or litre) or their decimal multiples. Temperatures should be expressed in degrees Celsius. There should be a space between the numerals and the unit of measurement, which should be written out as defined by the IMS. For example:

3.5 m ; 100 km² ; 25 l

- 1.3.11 Formulas and equations. Equations and formulas should be written in a separate line, centred in relation to the text. Formulas should be numbered only when needed. For example:

$$X + Y = Z$$

- 1.3.12 Date format. Dates referring to large chronological units – such as 2nd millennium, 10th century, second quarter of the 15th century, which do not mention a specific year – should follow the BC (before Christ) and AD (anno Domini) system.

- 1.3.13 Numbers. When not followed by units of measurement, numbers from one to ten should be written out; use Arabic numerals for numbers 11 and above. For numbers above one million, refer to the notation in Table 2 (examples column).

Table 2 – Notation for numbers over one million

| Spelled out | Numerals | Exponents | Examples (IUM) |
|----------------------|---------------------------|------------------|---|
| One thousand | 1,000 | 10 ³ | One hundred and twenty thousand (120x10 ³) |
| One million | 1,000,000 | 10 ⁶ | One million euros (1x10 ⁶ €) |
| One thousand million | 1,000,000,000 | 10 ⁹ | Fifteen thousand million (15x10 ⁹) |
| 1 billion | 1,000,000,000,000 | 10 ¹² | Seven billion euros (7X10 ¹² €) |
| One thousand billion | 1,000,000,000,000,000 | 10 ¹⁵ | Fifty thousand billion (50x10 ¹⁵) |
| One trillion | 1,000,000,000,000,000,000 | 10 ¹⁸ | Two trillion euros (2x10 ¹⁸ €) |

- 1.3.14 Tables and Figures (and other graphical elements such as maps, drawings or charts) should:

- 1.3.14.1 Be referred to in the text by Arabic numerals followed by a dash, as shown in Table 3.

Table 3 – Numbering of Tables and Figures

| | |
|---------------|----------------|
| Tables | Figures |
|---------------|----------------|

| | |
|--------------------------|--------------------------------|
| Table 1 - Portuguese GDP | Figure 1 - Solar system |
| Table 2 - French GDP | Figure 2 - Nervous system |
| Table 3 - German GDP | Figure 3 - Respiratory system |
| | Figure 4 - Neurological system |

1.3.14.2 Be followed by a brief descriptive title (Times New Roman font, size 9, bold) and the identification of the source (Times New Roman, size 9, preceded by “Source:”).

Note₁: When the graphic materials (tables, figures, and similar elements) included in the work are prepared and created by the author, the source should not be identified.

Note₂: When the graphic materials (tables, figures, and similar elements) are a reproduction or an adaptation, the source must be cited in one of the following manners (depending on the source):

- Source: Surname (date) followed by a full stop;
- Source: Adapted from Surname (date).

In the latter case, when the elements are adapted from several authors, all authors should be identified in alphabetical order, as follows:

Source: Adapted from Alves (2018), Sousa (2018) and Vargas (2001).

1.3.14.3 Be filled out in Times New Roman font, size 10, single spaced (line spacing set at 1).

1.3.14.4 Be referred to in the text immediately above, always with the first letter capitalized.

1.3.14.5 Be submitted separately in editable format.

1.3.14.6 Be formatted as in the following examples, include a legend and the identification of the source (in the Tables, the title should appear above and the Source below; in the Figures and other elements, the caption and source appear below these elements, single spaced), and be referred to in the text.

1.3.15 Indented quotations. Direct quotes of 40 words or more should be indented by 2 cm, without quotation marks, written in Times New Roman, size 12 font, set at 1.5 spacing, and the source should appear on the right side, as in the example below. Note: This is the only case where the source appears after the full stop (see example below).

Example of indented quotation

The body responsible for managing the IUM Editorial Lines is the IUM Research and Development Centre (CIDIUM). CIDIUM publishes a scientific journal, the *Portuguese Journal of Military Sciences* that:

[...] is fully committed to adopt the paramount of only accepting contents that respect the principles of scientific research and publication ethics.

Among others, the PJMS defines as a rule of thumb the principles of research integrity, rigor, scrupulous, seriousness, transparency, care and respect for all participants, honesty and originality of the scientific and academic content that publishes, authenticity and recognized added value to relevant literature in the field of Military Sciences.

In addition, the PJMS applies the principles of Publication Ethics and Publication Malpractice Statement based on the Code of Conduct and Best Practice Guidelines for Journal Editors of the Committee on Publication Ethics – COPE (available at COPE: Committee on Publication Ethics | Promoting integrity in scholarly research and its publication). (PJMS, 2022)

1.3.16 Rules. The rules for the References section and in-text citations (direct and indirect) and for the structure, writing style, and standardisation of the works produced at the IUM and / or submitted for publication in a CIDIUM Editorial Line should follow the version of the APA Style adapted by the IUM (as in the examples below).

2. Author Guidelines specific to the CIDIUM Editorial Lines

2.1 Portuguese Journal of Military Sciences

The PJMS is published in two versions. A digital version, retrievable from the IUM website, and a printed version. In addition to the Guidelines listed in point 1, the manuscripts submitted must comply the *Publishing Ethics Guidelines and Responsibilities of the PJMS* (available at [Publishing-Ethics-Guidelines-and-Responsibilities-of-the-PJMS.pdf \(ium.pt\)](#)) and be accompanied by the *Identification Form: Article / Author(s)* ([Identification-Form-article-author.pdf \(ium.pt\)](#)) and *Declaration of Honor* ([Declaration-of-honor Submission-to-PJMS.pdf \(ium.pt\)](#)), duly filled out. In addition, they can follow the above structure.

2.1.1 Recommended structure:

2.1.1.1 Be 8000 to 10000 words long (including footnotes and graphic elements such as tables, and excluding the References), and should include no more than 10 figures / tables (preferably in black and white).

2.1.1.2 Be organized into chapters. The following is an example of a possible structure (others may be used):

- **Abstract.** Maximum of 200 words, describing: the research problem / object of study; the research methodology; the main findings; the most important conclusions;
- **Keywords.** Maximum of six words and / or phrases that accurately describe the contents of the work.
- **Introduction.** First numbered chapter, which may include: the contextualisation of the topic and why it should be examined; the object of study and research problem; the delimitation of the study (in terms of time, space and content); the research objectives (general and specific - GO and SO); and the research question(s) (RQs).
- **Theoretical and conceptual framework.** Second numbered chapter, which may include: the state-of-the-art / literature review, the theoretical framework / extant theories, key concepts and analysis model.
- **Methodology and method.** A numbered chapter that follows the theoretical and conceptual framework, describing all steps that help explain the study and the study findings so future studies can attempt to replicate them. This includes the research methodology (research approach, research strategy and research design) and methods

(participants and procedure, data collection instrument(s), and data processing technique(s)).

- **Presentation of data and analysis of findings;** this section contains: the data presented in the form of tables, charts, etc. (when applicable); the examination of the findings; the validation of the hypotheses (when applicable); the answer to the subsidiary questions and, finally, the research question.

Note: When the findings discussion section is relatively long, the author may choose to divide the information into two chapters: an “n” chapter titled “Presentation of data” and an “n+1” chapter titled “Discussion of findings”. In this case, the “Conclusions” will be chapter “n+2”.

- **Conclusions.** Last numbered chapter that may include: a brief contextualisation of the topic; a (very brief) summary of the methodological procedure; the main research findings; the study’s contribution(s) to knowledge; the study limitation(s); suggestions for future studies; practical recommendation(s) (when applicable).
- **References.** This section should only include sources that are cited in the text.

2.1.2 Critical book reviews should:

2.1.2.1 Be 3000 to 3500 words long (including footnotes, bibliography and any graphic elements, including tables);

2.1.2.2 Be organised according to the following chapter structure:

- **Book data.** The first numbered chapter containing the following identifying elements: author; date; title; publisher (published by); structure; number of pages (pages); keywords (up to 5 words and / or phrases); name of critical review author;
- **Author data** (this refers to the author(s) of the reviewed work);
- **General impressions;**
- **Summary;**
- **Strengths and weaknesses** (of the arguments presented by the author);
- **Reading recommendations;**
- **References** (the only unnumbered chapter).

2.1.3 Email address to which the elements listed in 2.1.1 and 2.1.2 should be sent:
revistacienciasmilitares@ium.pt.

- 2.1.4 The PJMS is a double-blind peer-reviewed international journal, published biannually in May and November.

2.2 “ARES” Collection

The “ARES” Collection is published in printed format. In addition to the Guidelines listed in point 1, there are certain specific requirements.

- 2.2.1 The works submitted to the “ARES” Collection should fall within the scope of publication of this Editorial Line:
- 2.2.1.1 Namely publish PhD theses by CIDIUM researchers and researchers from other institutions on topics that address the core areas of Military Sciences and national and international Security and Defence.
- 2.2.1.2 Disseminate the academic, scientific, and research work produced by IUM researchers, autonomously or in collaboration with national and foreign researchers.
- 2.2.2 Email address to which the elements listed in 2.2.1 should be sent: cidium@ium.pt.
- 2.2.3 The “ARES” Collection does not have a regular schedule of publication. However, at least four issues should be published annually.

2.3 IUM Notebooks

The IUM Notebooks aim to disseminate the findings of the studies carried out at the IUM, autonomously or in collaboration. In addition to the general guidelines listed in point 1, there are certain specific requirements.

- 2.3.1 The papers submitted to the IUM Notebooks should fall within the scope of publication of this Editorial Line, and should consist of:
- 2.3.1.1 Research work produced by CIDIUM researchers and other national and foreign researchers on topics pertaining to Military Science, National and International Security and Defence, and / or that address CIDIUM’s priority research lines.
- 2.3.1.2 High-quality individual or group research works / practical application studies by IUM students, in particular by the auditors of the Flag / General Officers Course (CPOG), the Joint Staff Course (CEMC), and the Field Grade Officers Course (CPOS), upon recommendation of the lecturers or of jury members present at the work’s public defence.

- 2.3.1.3 Papers, essays, and reflection articles prepared by the lecturers of the Department of Postgraduate Studies (DEPG), CIDIUM researchers and course auditors.
- 2.3.1.4 Communications by CIDIUM researchers presented at scientific events (e.g., seminars, conferences, workshops, panels, round tables), in Portugal and abroad.
- 2.3.2 The *IUM Notebooks* are published in digital format (e-book retrievable from the IUM website) and in print, and do not have a regular schedule of publication. However, at least six issues should be published annually.
- 2.3.3 Email address to which the elements listed in 2.3.1 should be sent: cidium@ium.pt.

2.4 *IUM Actuality*

IUM Actuality is published in digital format (e-book retrievable from the IUM website). In addition to the Guidelines listed in point 1, there are some specific requirements.

- 2.4.1 The works submitted to *IUM Actuality* should:
 - 2.4.1.1 Fall within the scope of publication of this Editorial Line, and should consist of:
 - Essays or opinion articles on current issues in security and defence;
 - Works on topics relevant to the Institute's processes and procedures.
 - 2.4.1.2 Preferably be written by IUM lecturers, CIDIUM researchers or other national or foreign researchers who collaborate with the IUM.
- 2.4.2 *IUM Actuality* does not have a regular schedule of publication.
- 2.4.3 Email address to which the elements listed in 2.4.1 should be sent: cidium@ium.pt.

3. In-text citations (applicable to all works produced and / or published by the IUM)

3.1 In-text citations of sources consulted by the author

Table 4 contains the rules for citing primary sources.

Table 4 – Rules for citing primary sources

| Authorship / Special Cases | In-text citation | |
|--|--|---|
| | Author name outside brackets | Author name within brackets |
| <p>One work by one author. Note: Primary source citations must include the page number or numbers, preceded by the abbreviations p. or pp., respectively. When there is no page number available, the paragraph number where readers can find the cited passage should be included. In indirect citations (secondary sources) this is optional but recommended, as it helps readers locate the paraphrased passage (APA, 2013, p. 171).</p> | <p>On the other hand, according to Pinheiro (2007, p. 215) “about 700 million passengers [...]”.</p> <p><u>Or</u>, when there is no page number:</p> <p>On the other hand, according to Pinheiro (2007, para. 4) “about 700 million passengers [...]”.</p> | <p>So far this year there have been about 700 million passengers (Pinheiro, 2007, p. 215).</p> <p><u>or</u>,</p> <p>So far this year there have been about 700 million passengers (Pinheiro, 2007, para. 4).</p> |
| One work by two authors . | Silva and Sousa (2008, p. 33) noted “that the costs associated with change [...]”. | Later research (Silva & Sousa, 2008, p. 33) showed that the costs [...]. |
| One work by three to five authors . | <p><u>First reference:</u> Silva, Sousa & Costa (2008, p. 33) noted “that the costs associated with change [...]”.</p> <p><u>Subsequent references:</u> Silva et al. (2008, p. 48) found that [...].</p> | <p><u>First reference:</u> “The costs associated with change are extremely high because [...]”. (Silva, Sousa & Costa, 2008, p. 33).</p> <p><u>Subsequent references:</u> There are many high costs associated with change (Silva et al., 2008, p. 48).</p> |
| One work by six or more authors : use et al. for all citations, including the first. | Castro et al. (2016, pp. 33-38), argue “that a marked decrease is expected to occur next year [...]”. | Next year should bring a marked decrease in terms of [...] (Castro et al., 2016, pp. 33-38). |
| Two or more works by different authors : list the references in alphabetical order. | Amarante (1998, p. 131), Costa and Abreu (2002, p. 21) and Pereira (1997, p. 23) agree that the GDP [...]. | Several researchers (Amarante, 1998; Costa & Abreu, 2002; Pereira, 1997) state that the GDP [...]. |
| Several works by one author published in the same year : add a letter to the year of publication (in alphabetical order according to the first letter of the title). | In his research, Sousa (2016a, 2016b) observed that economic growth has progressed towards [...]. | In terms of trends, economic growth has tended to [...] (Sousa, 2016a, 2016b). |
| Several works by one author published in different years : write the references in chronological order. | As noted by Silva (2002; 2004a; 2004b), growth has tended to [...]. | Growth has tended to [...] (Silva, 2002; 2004a; 2004b; 2016). |
| Collective / group author (with an easily identifiable abbreviation) : in the first reference, write the name in full, followed by the abbreviation enclosed in brackets; in subsequent references write only the abbreviation. | <p><u>First reference:</u> The Military University Institute (IUM, 2016) includes [...].</p> <p><u>Subsequent references:</u> In terms of Standards, the NEP/ACA 001 issued by the IUM (2018) defines [...].</p> | <p><u>First reference:</u> Military higher education is highly demanding and challenging (Military University Institute [IUM], 2016).</p> <p><u>Subsequent references:</u> With regards to Standards, the NEP/INV 001 is perfectly clear (IUM, 2018).</p> |

| | | |
|--|---|--|
| Collective / group author (no abbreviation). | The University of Petersburg (2005) [...]. | [...] is not a practice of the university (University of Petersburg, 2005). |
| Electronic communications, telephone conversations or other type of personal communications (face-to-face interviews, personal letters, etc.) are not considered recoverable (“recoverable data”, APA, 2013, p.179) and should only appear as in-text citations, identifying the initials of the “communicator”, followed by the surname and date (as accurate as possible). | <p><u>First reference:</u> As stated by A. B. Costa (face-to-face interview, 06 December 2018), “the national GDP [...]”</p> <p>In the words of J.M. Sousa (face-to-face interview, 24 December 2018), “the national GDP [...]”</p> <p>According to data provided by the Air Force Directorate of Personnel (email, 06 December 2018), “the number of hires in [...]”</p> <p><u>Subsequent references:</u> As stated by A. B. Costa (op. cit.), “are inexistent [...]”</p> <p>In the words of J.M. Sousa (op. cit.), “have not occurred [...]”</p> <p>According to data provided by the Air Force Directorate of Personnel (op. cit.), “military contract personnel were [...]”</p> | <p><u>First reference:</u> [...] national GDP is extremely high (A. B. Costa, face-to-face interview, 06 December 2018).</p> <p>[...] has increased (J.M. Sousa, face-to-face interview, 24 December 2018).</p> <p>[...] has decreased (Air Force Directorate of Personnel, email, 06 December 2018).</p> <p><u>Subsequent references:</u> [...] are inexistent (A. B. Costa, op. cit.).</p> <p>[...] were inexistent (J.M. Sousa, op. cit.).</p> <p>[...] require further study (Air Force Directorate of Personnel, op. cit.).</p> |
| <p>Special cases in which some descriptive elements are missing. When:</p> <p>1. The name of the author is unknown, use Anonymous;</p> <p>2. The date of publication is unknown, use n.d. (no date).</p> | <p>As postulated by Anonymous. (1999, p. 177), “the national landscape [...]”.</p> <p>In his research, Smith (n.d., p. 33) observed that “the higher the GDP [...]”.</p> | <p>The national landscape [...] (Anonymous, 1999, p. 177).</p> <p>The higher the GDP [...] (Smith, n.d., p. 33).</p> |

Source: Adapted from APA (2013).

3.2 In-text citations of works written in a foreign language

When citing sources written in a foreign language, paraphrase the passage in the body of the text (without quotation marks):

- When using only the most relevant content / idea;
- When translating the source text.

In both cases, the cited work is identified by surname, date and page(s) number(s) (the latter is recommended but not mandatory).

Note: In example b., when the author provides a direct translation of the source text, the translation may be followed by a footnote and the original text (in the case of English, Spanish and French sources) between quotation marks, as in the following example:

Author’s translation of “Original text / texto original / texte original.”

3.3 In-text citations of works not consulted by the author

Table 5 contains the rules for citing secondary sources.

Table 5 – Rules for citing secondary sources

| Authorship / Special Cases | In-text citation | |
|--|---|--|
| | Author name outside brackets | Author name within brackets |
| When a work is cited through secondary sources, write the name of the original author, the year of publication, followed by “cited in” and the name of the author of the consulted work, followed by the year of publication and page number. Note: The page number must be mentioned when citing primary sources. When citing secondary sources, this is optional but recommended, as it helps readers find the paraphrased passage (APA, 2013, p. 171). | The research conducted by Brown (1966 cited in Bassett, 1986, p. 142) revealed that “there is a positive correlation between [...]” | In fact, a positive correlation was found between the two variables above (Brown, 1966, cited in Bassett, 1986, p. 142). |

Source: Adapted from APA (2013).

4. Creating the reference list (applicable to all works produced at and / or published by the IUM)

4.1 Printed books, reference works and parts of printed books

Book by one author

Surname, Initials. (Year of publication). *Title of work* (and edition if not the first edition). City: Publisher.

Baron, D. E. (2008). *Business and the organisation*. Chester: Pearson.

Book by two to seven authors

Surname, Initials (last two names joined with an ampersand (&)). Year of publication. *Title of work* (and edition if not the first edition). City: Publisher.

Barker, R. A., Kirk, J., & Munday, R. H. (1988). *Narrative analysis* (3rd Ed.). Bloomington: Indiana University Press.

Book by eight or more authors

Surname, Initials (list the first six names followed by an ellipsis and the last name). (Year of publication). *Title of work* (and edition if not the first edition). City: Publisher.

Author, A. A., Author, B. B., Author, C. C., Author, D. D., Author, E. E., . . . Author, H. H. (Year of publication). *Title of work* (and edition if not the first edition). City: Publisher.

Chapter in a book

Surname, Initials. (Year of publication of chapter). Title of chapter. In: Editor / coordinator (Initials and Surname) (Ed.), *Title of book* (page number(s)). City: Publisher.

Samson, C.F. (1970). Problems of information studies in history. In: S. Stone (Ed.), *Humanities information research* (pp. 44-68). Sheffield: CRUS.

Collective author / institution

Name of organization (Year of publication). *Title of work* (and edition if not the first edition). City: Publisher.

American Psychiatric Association (1994). *Diagnostic and statistical manual of mental disorders* (4th Ed.). Cambridge MA: Harvard.

Author or editor / reviewer / organiser / coordinator / director

Surname, Initials (Ed. / Rev. / Org. / Coord. / Dir.). (Year of publication). *Title of work* (and edition if not the first edition). City: Publisher.

Menéres, M. G. (Ed.) (2005). *Peregrinação de Fernão Mendes Pinto*. Rio de Janeiro: Nova Fronteira.

Silverman, D. G., & Propp, K. W. (Eds.) (1990). *The active interview* (3rd Ed.). Beverly Hills, CA: Sage.

Several works by one author in the same year

Surname, Initials. (Year of publication followed by letter; in alphabetical order according to the first letter of the title). *Title of work* (and edition if not the first edition). City: Publisher.

Soros, G. (1966a). *Beyond the road to serfdom*. Chicago: University of Chicago Press.

Soros, G. (1966b). *The road to serfdom*. Chicago: University of Chicago Press.

Edition number

Surname, Initials. (Year of publication). *Title of work* (and edition if not the first edition). City: Publisher (Note: If it is not the first edition, the edition number should be cited).

Redman, P. H. (2006). *Good essay writing: a social sciences guide* (3rd Ed.). London: Open University.

Translated books

Surname, Initials. (Year of publication). *Title of work* (and edition if not the first edition) (Name of translator: initials and surname, followed by Transl.). City: Publisher.

Canetti, E. G. (2001). *As vozes de Marrakesh: o registo de uma visita* (J. A. Underwood, Transl.). San Francisco: Arion.

E-books

Surname, Initials. (Year). *Title of work* [Type of electronic document (if a printed version is available)]. doi:xx.xxxxx (when available) or Retrieved from URL (for works that do not have a doi)

Ashwin, P. G. (2005). *Changing Higher Education: The Development of Learning and Teaching* [PDF]. Retrieved from <http://lib.mylibrary.com?ID=24441.pdf>

O'Keefe, E. F. (n.d.). *Egoism & the crisis in Western values*. Retrieved from: <http://www.onlineoriginals.com/showitem.asp?itemID=135>

Schiraldi, G. R. (2001). *The post-traumatic stress disorder sourcebook: A guide to healing, recovery, and growth* [PDF]. doi:10.1036/0071393722

4.2 Journal articles and theses

Journal articles

Surname, Initials. (Date). Title of article. *Full title of journal*, Volume (Number), Page number(s). doi:xx.xxxxx (when available) or Retrieved from URL (for articles that do not have a doi and are available online)

Printed works without a doi:

Perry, C. D., Reading, J. L., Williams, T. P., Andrews, K. W., & Wilson, P. H. (2001, 25 May). What health care assistants know about clean hands. *Nursing Times*, 97(22), 63-64.

Online works without a doi:

Adler, J.M., & McAdams, D.P. (2007). Time, Culture, and Stories of the Self. *Psychology Inquiry*, 18(2), pp. 97-128. Retrieved from <https://www.sesp.northwestern.edu/docs/publications/1394533777469664904db9f.pdf>

With a doi:

Assunção, R. R., Domingos, S. R. M., Cabral, A. C. A. , Santos, S. M., & Pessoa, M. N. M. (2014). Satisfação e comprometimento organizacional afetivo: um estudo com docentes universitários do curso de ciências contábeis. *Revista de Administração da UFSM*, 7(3), pp. 453-468. doi: 10.5902/198346595767

Articles accepted for publication but not yet published

Surname, Initials. (Year the work was completed). *Title*. Unpublished manuscript.

Surname, X. W. (2018). *Title of article*. Unpublished manuscript.

Articles submitted for publication or in preparation

Surname, Initials. (Year the work was completed). *Title*. Manuscript submitted for publication or Manuscript in preparation

Surname, X. W. (2018). *Title of article*. Manuscript submitted for publication.

Abstract of an article

Surname, Initials. (Year of publication). Title of article [*Abstract*]. *Full title of Magazine, Volume* (Issue number), page number(s) (when available).

Boughton, J. W. (2002). The Bretton Woods proposal: a brief look [*Abstract*]. *Political Science Quarterly*, 42(6), 44-56.

Boughton, J. W. (2002). The Bretton Woods proposal: a brief look [*Abstract*]. *Political Science Quarterly*, 42(6), 44-56. Abstract retrieved from <http://libweb.anglia.ac.uk>

Dissertations and theses

Surname, Initials. (Year of publication). *Title of dissertation / thesis* (Author data). Official title of Institution, City.

Graça, C. D. (2008). *A evolução do pensamento estratégico cabo-verdiano (1975 a 2007)* (Master's dissertation in History, Defence, and International Relations). Institute of Social and Political Sciences [ISCSP], Lisbon.

4.3 Conferences, seminars and symposiums

Conference papers and reports

Surname, Initials. (Year, Month). *Full title of conference paper / report*. Paper / report presented at conference held by Host Institution, City.

Brown, J. W. (2005, May). *Evaluating surveys of transparent governance*. Paper presented at the 6th Global forum on reinventing government: towards participatory and transparent governance, United Nations, New York.

Unpublished communications presented at congresses, meetings, symposiums, or conferences

Surname, Initials. (Year, Month). Title of communication. In: Host institution, *Title of symposium*. Symposium organised by Institution XX, City.

Ferreira, J. D. (2007, November). A 1.^a invasão francesa: porque não se lutou desde a primeira hora?. In: Portuguese Military History Committee, *A Guerra Peninsular: Perspetivas Multidisciplinares: Congresso Internacional e Interdisciplinar Evocativo da Guerra Peninsular*. Congress organised by the Calouste Gulbenkian Foundation, Lisbon.

Brown, J. W. (2005, May). Evaluating surveys of transparent governance. In: United Nations Department of Economic and Social Affairs [UNDESA], *6th Global forum on reinventing government: towards participatory and transparent governance*. Symposium organised by the United Nations, New York.

4.4 Technical standards and legal documents

Technical and research reports

Issuing authority or author. (Year of publication). *Title* (Title of report). City: Publisher or issuing authority (Note: when the two are the same, use “Author” as in the example below).

Ministry of National Defence. (2014). *Iniciativas Multinacionais de Transporte Estratégico - Modelo de Participação Nacional* (Information/Opinion 1225). Lisbon: Author.

Ministry of Science, Technology and Higher Education. (1999). *Declaração de Bolonha*. Retrieved from <http://www.dges.mctes.pt/DGES/pt/Estudantes/Processo+de+Bolonha/Processo+de+Bolonha/>

Ministry of National Defence, Directorate General for National Defence Resources. (2015). *Relatório da visita do Diretor do MCCE*. Lisbon: Author.

Broadhurst, R. G., & Maller, R. A. (1991). *Sex offending and recidivism* (Tech. Rep. No. 3). Nedlands: University of Western Australia, Crime Research Centre

Technical standards

Title of standard (Year of entry into force). *Title of standard*. City: Issuing authority.

NP 405-1. (1994). *References: printed sources* Lisbon: Portuguese Quality Institute.

Legal documents

Legal documents have no authorship in APA style, and no information is provided for citing legislation from countries other than the United States of America. Therefore, when citing Portuguese legal documents, follow the example below:

Title of document (Year). *Title of document*. Title of publication, number of series, issue number of Diary of the Republic / other sources, Page number(s). City: Issuing authority.

Decree-Law No. 192/1989 of 08 June (1989). *Utilização de aditivos nos géneros alimentícios*. Diary of the Republic, 1st Series, 131, 2254-2257. Lisbon: Ministry of Agriculture, Rural Development and Fisheries.

Decree-Law No. 48/1986 of 13 March (1986). *Sets out the legal framework that governs the institutional relationship between military higher education schools and the establishments that integrate the Portuguese university system*. Diary of the Republic, 1st Series, 60, 608-609. Lisbon: Ministry of National Defence.

Organic Law No. 5/2014 of 29 August (2014). *First amendment to the Law on National Defence, approved by Organic Law No. 1-B/2009 of 7 July*. Diary of the Republic, 1st Series, 166, 4545-4557. Lisbon: Assembly of the Republic.

4.5 Personal communications (face-to-face interviews, etc.)

Personal communications (which include face-to-face interviews, telephone communications, personal letters, memoranda, emails, etc.) are not considered recoverable (“recoverable data”, APA, 2013, p. 179). Therefore, they should not be included in the references, but should be cited in the text (cf. Table 4).

4.6 Mailing lists and other types of online communication

Email (included in personal communications)

Electronic communications (including telephone conversations and other types of personal communication: face-to-face interviews, personal letters, etc.) are not considered recoverable (“recoverable data”, APA, 2013, p. 179). Therefore, they should not be included in the references, but should be cited in the text (cf. Table 4).

Webpages

Author or source. (Year, day, month). Title [Type of media]. Retrieved from URL

Armed Forces General Staff (n.d.). Current Missions [Online]. Retrieved from <https://www.emgfa.pt/pt/operacoes/missoes>

Blog / Social media / Mailing lists

Author, Initials. (Year, day, month). *Title of blog* - Title of blog homepage [Type of medium]. Retrieved from URL

Gomes, C. D. (2017, 27 July). Blogue de Lisboa - Museu de Marinha apresenta exposição temporária sobre a Aviação Militar Portuguesa [Blog post]. Retrieved from <https://bloguedelisboa.blogs.sapo.pt/tag/for%C3%A7as+armadas>

Rampersad, T. P. (2005, 08 June). Re: Traditional knowledge and traditional cultural expressions [Web forum comment]. Retrieved from http://www.wipo.int/roller/comments/ipisforum/Weblog/theme_eight_how_can_cultural#comments

MiddleKid, F. W. H. (2007, 22 January). Re: The unfortunate prerequisites and consequences of partitioning your mind [Blog comment]. Retrieved from http://scienceblogs.com/pharyngula/2007/01/the_unfortunate_prerequisites.php

Folha, J. O. (2008, 22 January). Direito à privacidade/Fotografia@net [Online discussion forum]. Retrieved from <https://www.forumfotografia.net/topic/3-direito-%C3%A0-privacidade/>

4.7 Archive material and collections

Archive material

Issuer / Author surname, Initials. (Date). *Title of materials* [Description of materials]. Name of collection (Number, name or file number, box, etc.). Name of library / archive, Location.

Chamber of Commerce. (1788, 24 May). *Alvará* [Manuscript]. Records of the requests made to the board of directors of the factories and waterworks of the Portuguese Kingdom (L. 431, f. 138). Torre do Tombo National Archive [NA / TT], Lisbon.

Brown, P. W. (1915). *An address to the Farmer* [Manuscript]. Holdbury Collection. 600. Holdbury Library, London, England.

Coelho, S. P. (1999). *Uniformes militares portuguesas do século XIX* [Postcard] Archive of the League of Friends of the Military Museum, Porto.

Images, photographs and letters (collection)

Issuer / Author surname, Initials. (Date). [Type]. Collection data (Number, name or file number, box, etc.). Name of library / archive, Location.

[Photographs by Robert M. Yerkes]. (ca. 1917–1954). *Papers* by Robert Mearns Yerkes (Box 137, Folder 2292). Manuscripts and Archives, Yale University Library, New Haven, CT.

Letter in a repository:

Frank, L. K. (1935, 4 February). [Letter to Robert M. Ogden]. Archive of the Rockefeller Center (GEB series 1.3, Box 371, Folder 3877), Tarrytown, NY.

Letter in a private collection:

Zacharius, G. P. (1953, 15 August). [Letter to William Rickel (W. Rickel, Transl.)]. Copy owned by Hendrika Vande Kemp.

Collection of letters in an archive:

Allport, G. W. (1930–1967). Correspondence. Gordon W. Allport Papers (HUG 4118.10). Harvard University Archives, Cambridge, MA.

In-text citations:

(Allport, G. W., 1930–1967, Allport to E. G. Boring, 1 March, 1939)

(Allport, G. W., 1930–1967, E. G. Boring to Allport, 26 December, 1937)

Recorded interview in an official / institutional archive

Name of interviewee (Year, day, month). Interviewed by Name of interviewer [Type of media]. Additional data.

Smith, M. B. (1989, 12 August). Interviewed by C. A. Kiesler [Tape recording]. President's Oral History Project, American Psychological Association. APA Archives, Washington, DC.

Silva, A. F. G. (1990, 10 December). Interviewed by Herman José [TV]. In *Conversas vadias*. RTP Archives, Lisbon.

4.8 Audiovisual media

Maps

Author of (original) map. (Year). Title of map. [Type of map]. City: Publisher.

Silva, J. M. (1972). Mapa dos arredores de Lisboa [Cartographic map]. Lisbon: Editorial Organizações.

Lewis County Geographic Information Services. (2002). Population density, 2000 U.S. Census [Demographic map]. Retrieved from http://www.co.lewis.wa.us/publicworks/maps/Demographics/census-pop-dens_2000.pdf

Google Earth 6.0. (2008). Hylands House and Estates [3D Buildings data layer]. Retrieved from <http://www.google.com/earth/index.html>

Video

Producer. (Year). *Title* [Type of media]. Place of recording: Publisher.

If the work is a film:

Producer, Director. (Year), *Title* [Type of media]. Place of recording: Publisher.

American Psychological Association. (2000). *Responding therapeutically to patient expressions of sexual attraction* [DVD]. Retrieved from <http://www.apa.org/videos/>

Egan, D. F. (Writer), & Alexander, J. M. (2005). *Failure to communicate* [TV series]. In D. Shore, House. New York, NY: Fox Broadcasting.

Music sources

Surname of composer, Initials. (Year of copyright). Title [Name of artist if different than composer]. In *Title of album* [Type of recording] Place of recording: *label*. (Date of recording when different than date of copyright).

Gallagher, N. P. (1994). Live forever [Oasis]. In *Definitely maybe* [CD]. Manchester: Creation Records.

Lang, K. D. (2008). Shadow and the frame. In *Watershed* [CD]. New York, NY: Nonesuch Records.

In-text citations should indicate the side or track number:
“Shadow and the frame” (Lang, 2008, track 10)

4.9 Others

For other types of references not included in this publication refer to the *Publication Manual of the American Psychological Association* (APA).

References

- American Psychological Association. (2013). *Publication manual of the American Psychological Association* (6th Ed.). Washington, DC: Author.
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Authors biographies²

Cristina Paula de Almeida Fachada is a Psychologist Lieutenant Colonel in the Portuguese Air Force (PoAF). She has a degree in Psychology – Psychotherapy and Counselling from the Faculty of Psychology of the University of Lisbon (FPUL); a master's degree in Human Resources Development Policies from ISCTE - University Institute of Lisbon (obtained after the public defence of the dissertation *Liderança: percepção, formação e socialização no contexto de ensino superior militar* [Leadership: perceptions, training, and socialisation in military higher education]); and a PhD in Psychology – Social Psychology from the FPUL (obtained after the public defence of the thesis *O Piloto Aviador Militar: Traços Disposicionais, Características Adaptativas e História de Vida* [The Military Pilot: Dispositional Signature, Adaptive Characteristics/Characteristic Adaptations and Life Story]). She has a postgraduate diploma in Military and Aeronautical Sciences from the Military University Institute (IUM) obtained after the public defence of the research work *Percepções da Sociedade Civil Portuguesa sobre a Força Aérea* [Civil Society's Perceptions about the Portuguese Air Force]. In addition to the mandatory career courses, she has completed the Psychological Operations Planning Course. As part of her duties as officer, she has held command / direction / leadership positions and has served as a psychologist: 1. in the PoAF Psychology Centre, where she was: acting director; head psychologist; head of the Department of Military Psychology and Organizational Development; head of the Department of Clinical and Educational Psychology; selection, clinical, educational, and research psychologist; 2. in the Air Force Academy (AFA), where, in addition to being head professor and / or teaching several Curricular Units (CUs), she was course director for technical and military training in Psychology, squadron commander, area coordinator for the Quality and Evaluation Office, and psychologist responsible for monitoring students' psychological wellbeing. She is currently stationed at the IUM, where she is a research associate at CIDIUM and head of the editorial team managing the IUM editorial lines – the *Journal of Military Sciences* (a bilingual scientific journal that uses a double-blind peer-review system and that is in the process of being indexed by SciELO), the *ARES Collection*, the *IUM Notebooks*, and *IUM Actuality*. She also has duties as professor at the Doctorate in Military Sciences and psychologist. She has authored, co-authored, and coordinated several peer-reviewed scientific articles and books. She is a member of the IUM Scientific and Pedagogical Councils. She supervises and co-supervises research works by master's and postgraduate students, as well as by students attending mandatory career courses. She is the psychologist responsible for monitoring the IUM's teaching activities. She has served as an examiner for master's dissertations at both civilian and military universities, and a reviewer to the *Portuguese Journal of Military Sciences*.

Nuno Miguel Brazuna Ranhola is a Commander in the Portuguese Navy. He holds a degree in Military Naval Sciences – Navy from the Naval School and a postgraduate diploma in Military Sciences – Security and Defence from the Military University Institute (IUM). He has a specialisation in Communications. In addition to the mandatory career courses, he has completed the Joint Staff Course, the NATO Lessons Learned Staff Officer Course (NLLSOC) and JALLC Analyst Training Course, the Maritime Warfare Course (MWC) of the Royal Navy, the Cyberdefense Operations Planning Course, and the African Studies Course of the IUM. He has held command, management and general staff positions at sea and on land. At sea, he held command posts and was First Mate in several naval units; he was Commander of the *Dragão* speedboat and of the *João Roby* corvette; he was twice Chief of Staff of the European Naval Force (EUNAVFOR) in Operation ATALANTA, which aims to combat piracy in the Horn of Africa, and has been attached to several European naval units. On land, he was commander of the Patrol Boat Group; head of the Communications Centre and of the Communications and Information Systems Department of the Azores Operational Command (COA), where he also served as Joint Chief of Staff Officer; head of the Analysis and Development Department of the Integrated Centre for Naval Training and Evaluation, trainer and course director for the Naval Operations Planning Course and the Advanced Naval Tactics and Operations Course; he was the Portuguese Subject Matter Expert for Communications and Message Text Formats, and represented Portugal and the Portuguese Navy in several working groups, national fora and at NATO. He was the Portuguese representative to several NATO working groups responsible for standardising publications, tactics and procedures in joint and combined naval operations; as General Staff Officer in the Portuguese Naval Force Command (POTG) and J5 of the Immediate Reaction Force (FRI), he participated in the planning, execution and analysis of several national exercises; he was head of the Communications and Cyphers Centre (CCC) of the General Staff of the Armed Forces (EMGFA). He is currently stationed at the IUM, where he serves as Military Operations Specialist and lecturer of the Human Behaviour and Resource Administration Teaching Area (AECHAR) responsible for the Organizational Behaviour CU; he teaches the following CUs: Command and Leadership, Scientific Research Methodology, Dissertation (for the Master's in Military Sciences – Security and Defence), Individual Research Work, Final Work, Individual End of Course Work, and Final Group Work, and Final Work of the Arms and Services Course. He supervises and co-supervises research works by postgraduate students and students attending mandatory career courses. His article *A (R)Evolução das Armas de Energia Dirigida nos Conflitos Militares* [A (R)Evolution of Directed Energy Weapons in Military Conflicts]

² The authors appear in the order in which they were listed at the beginning of this publication.

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João Paulo Ramalho Marreiros is a Commodore in the Portuguese Navy. He has a degree in Military Naval Sciences with a specialisation in Hydrography from the Naval School; a Master's in Geodesy and Geomatics from the University of New Brunswick, Canada; a PhD in Surveying Engineering from the Faculty of Science of the University of Porto. As a junior officer, he served on board the NRP *Sacadura Cabral*, on the Hydrographic Brigade, on board the NRP *Almeida Carvalho* and on the Hydrographic Institute Division. As a senior officer, he was head of the Hydrographic Brigade, head of the Equipment, Systems and Methods section of the Hydrographic Institute, commander of the NRP *D. Carlos I*, commander of the Hydrographic Vessels Group, lead expert on the project to refurbish the hydrographic vessel NRP *Almirante Gago Coutinho*, director of the School of Hydrography and Oceanography, director of the Documentation Department of the Hydrographic Institute, and teaching director and lecturer at the Naval School. He has coordinated the Human Behaviour and Resource Administration Teaching Area of the Department of Postgraduate Studies of the Military University Institute, and is currently the director of the IUM Research and Development Centre. He is also the director of the Flag Officers Course and the director of the Doctorate in Military Sciences, as well as professor. He serves as thesis supervisor and member of examiner committees, and, as a researcher, has authored and co-authored scientific articles in the field of geographic engineering and military sciences.

Lúcio Agostinho Barreiros dos Santos is a Reserve Colonel in the Portuguese Army. He holds a degree and a Master's degree in Military Sciences from the Military Academy; a degree in Human Resource Management from the Lusófona University; a postgraduate diploma from the National Institute of Administration (Studies in Leadership and People Management); and a PhD in Economics and Management with a specialisation in Human Resources from the Lusfada University. He is a Recognised Expert in Human Behaviour and Healthcare in Military Contexts, one of the core areas of Military Sciences. He has completed the mandatory career courses, the General Staff Course, the Commander Internship Programme and the General Officers Course. He has completed several short monographic courses in the areas of leadership and management, emotional intelligence and data processing (National Institute of Administration, PSE, Thomaz International). He has held command / direction / management and general staff positions and served at the EPI, RI19, EME, IAEM and IESM (as lecturer and course director), at the RI2 (as 2nd Commander), at the ESE (as Commander) and at the AM (as director of the Department of Social and Human Sciences and of the Education Coordination Department). He was director of the Security and Defence Research Centre (CISD) of the Military University Institute (IUM), editorial coordinator of the *Portuguese Journal of Military Sciences*, as well as of the other IUM editorial lines (*ARES Collection*, *IUM Notebooks* and *IUM Actuality*), and a member of the IUM Pedagogical Council and of the Evaluation Committee of the IUM's Internal Quality Assurance System. He has authored and co-authored educational publications and journal articles in the areas of leadership, human resource management and training. He is an Integrated Researcher of the Centre for Research in Organisations, Markets and Industrial Management (COMEGI) of the Lusfada University. He is a full member of the *Revista Militar* and a member of AFCEA Portugal.

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