

Doc Rock's Growing List of Technical Writing Hints, Tips, and Tricks

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This informal list is intended to assist those who prepare technical manuscripts but are not yet fully versed in the nuances that make such writing different from general writing style.

Engineers, on average, spend about 50% of our work-hours *writing*! Most of us *ain't* good, natural writers; please join me in a continuous effort to improve our technical writing.

Employers of engineers routinely list that having good communication skills is the #1 desired attribute in their new hires. Effective writing is a major component of communication skills.

The purpose of technical writing is to successfully describe our methods, ideas, designs, other results, conclusions, and recommendations to our clients and other readers. Our writings are often preserved for posterity, often online worldwide, whether we want them to be or not.

Due to the economic pressures of our times, publishers often do little or *no* editing of accepted manuscripts, except for final-formatting. So it is up to you, and worth your while, to make your writings of professional quality every time. For substantial documents the publisher should send you a "proof" just before they print it; you must review the proof *very* carefully and return your as brief as possible comments swiftly so as not to delay or cancel publication. Their editor may have made substantive changes with which you disagree, so, again, read the proof very carefully.

Learning the conventions and rules of technical writing can be tedious, but once familiar with their use technical writing becomes much easier.

If writing for a specific publication such as for a journal or magazine, a master's thesis or Ph.D. dissertation, a competition, or a book or web publisher, before you start obtain, read, and follow precisely the publisher's rules and their style conventions. These rules are often posted on their website, or printed within a journal itself, for example. Also study several highest quality examples of what they have published recently to observe, and possibly mimic, successful

writing styles. However, if a publisher will be formatting your work their editors generally do not want you to do too much formatting yourself because they use different software, e.g., desktop publishing (DTP) vs. our common word processing applications (e.g., MS Word®).

Publishers' and successful authors' style preferences vary, but the ultimate guide to general publishing style is The Chicago Manual of Style (CMS or CMOS) [The University of Chicago 2010]. Standard technical writing style does vary somewhat from general or "APA" style.

Spoken American-English is different from that written. Also, American-English varies somewhat from British-English and other variations, so be careful of spelling and terminology differences. Be mindful of a publisher's location – if in Europe, for example, its editors likely prefer or require British-English, and use of SI units, only.

Assume a general-technical audience for most of your technical writings; I, for example, think of how a civil engineer, as the reader, would understand HVAC or solar energy. In addition, your audience might or will be international, so be aware of inch-pound (I-P) vs. SI systems of units, dialect and cultural differences, etc. For example, there are different dollar currencies used worldwide, so using "US\$" or "USD" at first mention is clearer than just using the "\$" symbol. Non-native English-users appreciate things being spelled-out rather than using contractions, so write cannot instead of can't, for example.

Technical writing is formal writing, so don't use jargon, informal sports or popular-culture phrases, etc. And don't use ", etc." – list all the items instead. And don't start sentences with "And." No emojis' use either. ☹

Beware of over- or improper use of certain words. For example, use "impact" to mean when physical objects are hitting one another with great force, and instead use "affect," "effect," "influence," "increase," "reduce," "limit," "stop," or "consequence," for example, when discussing something's effect on another thing. "Impactful" is not a proper word, nor is "orientate" or "preventative" in formal American-English.

Avoid commercialism. When wanting to mention a specific product use an equivalent generic term for it instead, and only cite the commercial source if absolutely necessary via your Reference list. For example, use "gypsum wallboard" instead of "Sheetrock®." However if a tradename cannot be avoided, e.g., in discussing the history of something specific, include the registered trademark (®) symbol with the first use of that term.

Use the front side of paper, only, for most technical products that are delivered in hardcopy-form. Ask if double-sided copies are appropriate for large works.

Use generous margins, normally one inch on each of the four sides of the page. However, if to be directly-reproduced and bound, make the binding-side margin wider, e.g., 1.25 or even 1.5 inches.

Use double line spacing for theses and dissertations, but 1.5 spacing for most other manuscripts. Use a single column of text per page. The publisher, in the final formatting, may do otherwise, e.g., two columns and single spacing is typical for academic journals. If self-publishing, you may

need to use desktop publishing software, and its conventions that are in addition to the advice given here.

Unless instructed to do otherwise, use a 12 point proportional serif font such as Times-Roman for your text, and a bolded sans-serif font such as Arial or Universal for figures' and tables' captions. Use a monospaced font such as Courier for any programming-language stubs inserted into your manuscript or included in appendices. Use bold and all-capitalized text for the manuscript's title and its sections' main headings; second-level headings are commonly of mixed capitalization and either bolded or in italics. Third-level headings, if any, are often italicized instead of bolded. Don't use colons (:), in, or underlining of, headings or subheadings.

Full-justification, vs. left- (a.k.a. "right-ragged"), is usually preferred for the text portions of your technical writings, and is used in this document. Hyphenate words, at their proper syllable-breaks and at the end of text-lines sparingly, if at all. And remember that "pagination" of the same manuscript's file will vary between versions of software, installed fonts, and printers.

When including long quotations in your manuscripts, indent the quoted text by half an inch on both the left and right, and also offset vertically by an extra space before and after, to "set it off from the main text." Be sure to give the citation for the quote too, typically at the end of the sentence before the quote, and provide the source in your References section.

Orient the manuscript as "Portrait." All text, including captions and labels within figures, then must read from the bottom or right side of the document. Never from the left or top. Very wide figures or tables may be rotated 90 degrees counterclockwise, along with their captions, if placed on separate pages; no general text is to appear on pages with rotated figures or tables. However, the page numbers on such rotated-figures' pages are normally oriented, to read from the bottom, if page numbering is utilized in the document.

Don't be hesitant to include extra blank spaces; e.g., vertically before and after lists, tables, equations, or figures; or about showing figures or tables on separate pages, or making things larger if doing so will improve the readability of your manuscript. Again, the primary purpose is to convey your ideas successfully to the reader, not to save paper or bandwidth. Do reuse or recycle your scrap paper when possible.

Consistently indent the beginning of new paragraphs or put a vertical space between paragraphs, but do not do both. The latter is done in this white-paper. When indenting instead, an exception is that some publications do not indent the first paragraph.

Don't use one-sentence-only paragraphs unless absolutely needed for very strong emphasis. Beware of run-on sentences too – break them up into multiple, logical sentences.

Avoid "widowed or orphaned" full or partial sentences when your paragraphs extend from one page to another. Word processing software often has "widow and orphan protection" available as an option. However, in some cases you may need to insert a "hard page break" instead.

Basic technical manuscripts include a Title, Abstract, Introduction, other main body sections, Results and Discussion, Conclusions and Recommendations, Acknowledgments, and References.

For long manuscripts, such as for books, theses, dissertations, or reports, include a separate title page and a Table of Contents. If there are many figures or tables, consider also including a Table of Figures or Table of Tables. For long writings, its “front matter” including the title page, Abstract, Table of Contents, as well as the chapters and other major sections each begin on a new page. If a very long manuscript, such as for a book, create and include an Index and place it at the end; remember to update the page numbers shown in the Index so that they are accurate for the as-printed version – do not assume that the publisher will make the last-second updates to your Index.

Use present-tense for the Abstract and future-tense for the Recommendations, but past-tense for almost everything else in your technical writings.

Provide transitions, usually via creating short paragraphs, between the main body’s sections to help guide the reader from one topic to the next.

The Abstract will often be the last major section of your draft that you write. Its purpose is to pique skimmers’ interest so that they will read the remainder of your paper, etc. So wet their appetites in the Abstract, but don’t give away the ending.

The main body of your manuscript will likely begin with the Introduction section or chapter. The first or maybe second paragraph of the Introduction should be your problem statement. In just a few sentences describe the big issues, but then funnel down quickly to the specific ones that your manuscript will address. The next portion of your Introduction is typically the literature review – use search tools such as Ei’s Compendex[®] (license required), Google Scholar[®] (scholar.google.com), and regular web searches to find relevant literature. For a very long manuscript its literature review is often in a separate chapter or section that follows the Introduction, and is commonly named Background.

After writing sections that describe your method, data, experiments or case studies, etc., the Results and Discussion section will present your findings. This portion of your manuscript is often data-intensive; consider using graphs instead of large tables for your results, for example, to assist the readers. Avoid small print in tables and figures as it may be unreadable in the final product. If your data or other content is bulky, put a sample and a description in your manuscript’s main body; place the remainder in an appendix or refer the reader to a publicly available source of that data.

The main body of your technical manuscript will end with a Conclusions and Recommendations section or chapter. Note it is *not* the “Conclusion” (singular) typical of general writing style; the Conclusions (plural) in technical writings restates the conclusions that you made and reported previously in your manuscript. No new concepts appear for the first time in Conclusions. The Recommendations portion of this section is your opportunity to suggest future work, to be performed yourself or by others. If you are already doing such needed work and intend to publish the results, state so.

After finishing the Abstract, Introduction, and Conclusions portions of your manuscript, you'll likely notice that each of these sections discuss similar concepts in at least slightly different ways. Some readers will jump directly to your Conclusions and Recommendations section, so it should read well as if it were stand-alone; in large reports, an Executive Summary is written too and appears just-after the Abstract. An Executive Summary is similar to but shorter than the Conclusions and Recommendations.

Include a short Acknowledgments section when the work was supported by others, or to recognize the assistance of other people who were not coauthors; anyone who did contribute directly should be listed as a coauthor. List all authors by descending order of most contributing-effort, so the author who did the greatest effort is listed first; listing-order is not by seniority or status. The "corresponding author," who communicates with the publisher and readers, is normally the first one listed so provide that author's full contact information.

For books and other very long manuscripts intended for wide distribution, including an About the Author(s) page, often with a professional "headshot" picture, is helpful for readers. A book publisher will also want a short "sales blurb" to put on the back cover of the book and to use in advertisements; this sales blurb is usually a couple of short, positively-worded paragraphs written in active, present-tense style.

Always give credit where credit is due. Never put yourself in the position of being accused of plagiarism or other theft of intellectual property. This includes borrowed-data used in tables, as well as others' equations and figures. Sources must be cited in the captions, and possibly in your text as well. Publishers will require you to obtain permissions in advance to reuse others' materials, especially figures and tables; consider if recreating them yourself is more efficient, but do still cite the sources of the data or concepts used.

Give complete references. Unless otherwise instructed by the publisher, use the author-year format in the text, e.g., [Rock 2022], and list all citations alphabetically by the first-authors' last names in your References section, e.g.,

ASHRAE 2021. The 2021 Fundamentals volume of the *ASHRAE Handbook*. The American Society of Heating, Refrigerating and Air-Conditioning Engineers, Inc., Atlanta, GA.

Einstein, A. 1905. "Concerning a Heuristic Point of View toward the Emission and Transformation of Light," (in German), *Annalen der Physik*, vol. 17, pp. 132-148, Wiley-VCH, Berlin.

Rock, B. A. 2022. "Doc Rock's Growing List of Technical Writing Hints, Tips, and Tricks," www.people.ku.edu/~hvacman/docrock/Technical_Writing_Hints-.pdf, The University of Kansas, Lawrence, Kansas.

When there are two authors, show both last names and the year, e.g., [Smith and Brown 1998], in your text's citation. If three or more, use the first author's last name and "et al." in the text, for example [Jones et al. 2005], but give all authors' names in your Reference list's entry.

Consider including a Bibliography section too, after the References, for listing any general readings that you didn't specifically cite but may have influenced your work. Format the Bibliography's entries the same as the Reference's.

Appendices must be referred to in the main body, or not be included. If there is more than one appendix, label them Appendix A, Appendix B, etc., and put them at the end of your document in the order first mentioned in the main body. If there is only one appendix, it is the Appendix, and not Appendix A. Use appendices for bulky content that distracts from the flow of the main text. Footnotes are generally discouraged in technical writings, so use them sparingly if at all. An exception is often a footnote on the first page that lists the authors' titles, affiliations, and locations.

Number all the pages. In very formal publications the first page of each new major section is numbered but the number does not appear; all pages are counted, however. Use lower-case Roman numerals starting with "i" for the cover pages, a.k.a. the "front matter," and use Arabic numerals starting with "1" for the main body of the manuscript through the appendices and Index, if any.

Use passive construction. And third-person only, so "I," "me," "we," "our," etc. are not used. Limit or eliminate the use of "one" as a pronoun to avoid a stuffy tone, however in the U.K. one's use is more acceptable.

At the first use of an abbreviation, acronym, or initialism, spell it out fully then follow immediately with the abbreviation in parentheses. E.g., "The indoor air quality (IAQ) was of concern in the room." Doing the reverse, e.g., IAQ (indoor air quality), is incorrect.

Symbols for variables in the text, equations, tables, and figures are italicized and defined at first use. E.g., "The mass (*m*) of the Earth is changing slowly due to arriving meteors and space-dust, less the loss of the lightest gases to space." If variables were not defined previously, include a "where" list just after each equation with brief definitions and their units. Provide a Nomenclature or Symbols list too, typically just after the Conclusions and Recommendations section for papers or before the first chapter for books, if many variables are used in the manuscript. For a very long manuscript a Terminology section may be beneficial as well, and is typically located after the Symbols list.

In the text use Arabic numerals for integers greater than about twelve, so use 13 instead of thirteen, and nine instead of 9. However, if a number starts a sentence, always spell it out; if it seems odd rearrange the sentence.

For “camera-” or “printer-ready” manuscripts; such as for theses, dissertations, and some books, and for self-published documents; their figures, tables, and equations *must* appear directly after first mention. For figures and tables, the best location is at the top of the next page rather than at the bottom of the current. For very formal writing that will be formatted by the publisher, do not embed figures or tables within the text, and definitely do not wrap text around them in your manuscript. For such unformatted manuscripts, tables and then figures appear at the end of the manuscript or as separate computer files, with only one per page or file. A separate page that provides all the table and figure captions may be required by the publisher.

Give all computer files clear, logical, informative names such as “Manuscript-Rock-09AUG2022.doc” and “Figure1-Rock.tiff.” For long writings, such as for books, keep each major section in a separate file. For graphics, check, in advance, which file-formats and minimum resolutions each publisher prefers. For “line art” figures, vector rather than raster files are normally preferred to allow quality resizing. When submitting any files via email, etc., realize that servers often restrict attached files’ sizes, so check for bounce-backs. If a confirmation of receipt is not given in a day or so, follow-up with a brief email message, without attachments, asking if the files were received.

For scholarly works that will be printed, avoid using color figures. Use hatching to fill bar charts, for example, and not “grey scale” because that latter often doesn’t reproduce well – typically too dark or unevenly. Color is expensive to print, and if a color figure is published instead as just black and white the figure may not be easy to understand. However, for glossy magazines, web publications, sales literature, and presentations, color figures are very beneficial and typically are preferred.

All figures, tables, and equations are numbered; most-traditionally, figures and equations are numbered with Arabic numerals, and tables are numbered with capital Roman numerals. Figures, tables, and equations must all be mentioned in the text, or not be included. And, again, they appear directly after first mention in preformatted, fully-edited manuscripts intended for direct publication.

In longer writings with chapters or large sections, it is best to number figures, tables, and equations anew from the beginning of each chapter or section – this also helps readers to find things faster. So, for example, if Chapter 1’s last figure is Figure 11, instead renumber all figures to include the chapter or section number; Figure 11 becomes Figure 1.11, for example. Then the first figure in Chapter 2 is Figure 2.1 instead of Figure 12. Using this convention also makes it easier for the writer – you – to add or delete figures, tables, and equations in your drafts.

Instead of using “(see Figure 4),” make such a concept part of the sentence. E.g., “Figure 4 depicts the relationship between the costs and the years to payback for the available options.” Capitalize the “F” in figure and “T” in table when mentioning specific ones in your text. Some publishers capitalize equation-mentions in the text, e.g., “as shown in Equation 7.23,” but others do not. Some abbreviate Figure with Fig. and Equation with eqn., but others do not.

All figures and tables must have captions, and they are usually in bold. Figures' captions go below the figures, tables' captions go above the tables. A good caption is short but is still descriptive enough so that the figure or table, with its caption, could be understood if separated from the text. A short caption does not necessarily require a complete sentence; if not a complete sentence do not put a period at its end. Again, remember to cite the source of the figure or table if not original, even if created by you but published previously elsewhere. Yes, it is possible to plagiarize yourself! And if you "signed-over" copyrights to the publishers of your prior writings, as is typical, you will need to get written-permissions from those publishers, in advance, to reuse your figures or tables. In formal technical writing, it is often considered inappropriate to cite you own prior work excessively.

For very complex equations use an equation editor, otherwise create them using normal word-processing. Equations are centered and are usually italicized or bolded, or both, and are labeled using right-justified numbers in parentheses, e.g.,

$$E = mc^2 \tag{1}$$

where:

- E = energy, BTU or J,
- m = mass, lb_m or kg, and
- c = speed of light, ft/s or m/s

Note that, as shown in the preceding example, equations are usually presented as part of sentences, so punctuate accordingly. Also note that a full colon, ":", is considered the terminator of a sentence and thus replaces the period. For the preceding, if the colon did not appear after "where" then a period would be used after "m/s" in the list of variables and their units.

For figures, tables, equations, quotations, etc. by others, provide citations in both the text as well as in the figures' or tables' captions; an exception is for things that are very well known to all. So Einstein's relevant paper could have been cited for the preceding Eqn. 1, but probably wouldn't be given because the equation and its discoverer are so well known.

When needing to name specific software or other tools, but trying to avoiding commercialism, describe generically the item and cite instead its user's manual in your References section. E.g., instead of "Trane TRACE[®] was used ..." use "A commercially-available HVAC load calculation program was used to determine the needed peak capacity of the equipment [Trane 2009]" in the text, and in your Reference list show:

Trane 2009. *Trane Trace[®] Load Design User Manual*. The Trane Company, La Crosse, Wisconsin.

Webpages can and do often change frequently, so cite the original, printed source of the information instead. If you cannot avoid citing something from the web or other nonpermanent, nonreadily-available source, obtain or print a hardcopy of that source and keep it in your files in case a reviewer asks about it, or when you or a reader needs to see it many years from now.

Generally, “personal communications,” “letters,” or unpublished drafts are not considered appropriate, citable sources for technical writings.

If you want to reuse copyrighted materials such as figures, tables, lengthy direct quotes, etc., you’ll need prior copyright permission from the copyright holder who is usually the *publisher*, not the author, of that material. If not available to you or too expensive, don’t use the material. For unusable figures, a solution may be for you to redraw them in substantially different ways so that they become original. Remember that, with few exceptions, all published work is copyrighted even if the copyright symbol (©) or statement does not appear.

Don’t state things parenthetically (such as this) in your text. Instead, make them part of the sentences or create whole new sentences with the information.

“It’s” means it is, or it has. “Its” shows possession. It’s its color.

The Latin abbreviation “e.g.” means “for example”; “i.e.” is for “that is.” A comma always follows use of an e.g. or i.e. in sentences, e.g., here.

The above also demonstrates that a comma or period punctuation goes inside a closing quotation mark, and not after. However, dashes, colons, and semicolons go after as is also shown.

When punctuation is needed at the end of a quotation, the symbol appears within the closing quotation mark, “such as this,” and not outside “this way”, even if the punctuation was not part of the original material being quoted or defined. Use an ellipsis (...) when text is deleted from, and [sic] after a preexisting error in a quote. If you add to or correct a quote, put that new text within square bracket[s].

“Datum” is singular so datum is or was; “data” is usually plural so data are or were, and not is or was. There are usage exceptions, however.

Atria, and not atriums, is the correct plural form of Latin names for spaces and things. So plenum/plena; auditorium/auditoria; gymnasium/gymnasia; etc. Multiple people debating or making presentations often stand on the *one* podium, and frequently stand behind one or more lecterns on that podium.

Use because (a reason), since (a time), and like (*not* for “as if”) correctly.

Spell separate, parallel, refrigerate, and paid correctly. Do not confuse break with brake.

Although convenient, using “and/or” is not appropriate in formal writing; “or” is correct for such situations where “and/or” seems to make more sense.

Reduce wordiness, e.g., “in order to” or “in order for” should be just “to” or “for”; “located at” should be “at,” and “prior to” should be “before.”

Fight redundancy, e.g., “10 a.m. in the morning” should be “10 a.m.,” “exact same” should be “same,” and “hot water heater” should be “water heater.”

Use the percent symbol (%) instead of the word unless starting a sentence. So, for example, it’s 100% outside air. One hundred percent outside air ventilates the building. Although decreasing in use, “per cent” is still sometimes used in British-English. Also note that in the U.S. our smallest-denomination coin is a “cent” where the British’s is a “penny.”

Don’t make an error by showing “.79¢” when 79¢ or \$0.79 was meant. Include leading zeros, e.g., the 0 in 0.242 instead of .242 to reduce reading-errors. Use “/” as the symbol for mathematical divisions, and not “÷”; “\” often represents an integer-division rather than a regular one.

Use the temperature degree symbol (°) instead of spelling-out “degrees” unless at the beginning of a sentence, so “Seventy degrees Fahrenheit is comfortable, but 80°F is too warm.” However, degrees are not ever used with Kelvins (K), only with °C, °F, and °R. So 273 K is about 0°C. Investigate whether the intended publication typically puts a space between the number and the temperature scale, e.g., 72°F or 72 °F.

Other common math symbols, and the Greek alphabet, are available in your word-processing software, so use them; for MS Word® use the “Symbol” link in the “Insert” tab. However, many publishers unfortunately can’t or won’t accommodate overstrikes, e.g., \dot{V} or \bar{V} , so reconsider using overbars or -dots, for example. These two may be easy to create in MS Office®, however, by typing 0307 or 0305 then Alt-X immediately after the letter.

Despite strong opinions otherwise, using the serial comma, a.k.a. the Oxford or Harvard comma, is correct (CMS §6.18). So, for example, “The cars for sale on the dealer’s lot were Fords, Toyotas, Chevrolets, and Hondas.” Not using serial commas, such as just after “Chevrolets” in this example, was a space- and lead-saving shortcut developed long ago by newspapers’ typesetters to shorten articles and reduce lead use. The serial comma can be quite necessary for clarity; an example is this sentence that was provided via CMOS-Online years ago: “I would like to thank my parents, Mother Theresa and the Pope.”

Experiencing writer’s block? Just write! Blurt it all out. Don’t worry about flow, corrections, or style until much later.

Save your work frequently. Back it up often too, e.g., at the end of each day, to a separate storage device and store that device in another safe location.

Mark drafts with a large “DRAFT” at their beginnings to avoid problems; red-ink DRAFT stamps are readily available for use on hardcopies. Some organizations require that every page of drafts

be marked with such. Only remove the DRAFT when submitting the final version for review or publication.

Never label a manuscript as its “FINAL DRAFT.” People will almost always require changes if you do.

If delivering your manuscript via a hardcopy, create it using a laser-printer to improve its appearance. After printing, double-check the formatting if you changed printers. Look for cropped lines, missing fonts or figures, strange page breaks, etc.

After you finish a draft, save it. Then do other things – preferably not reading or writing -- for as long as possible. Then come back and edit your draft – you’ll be amazed at all the improvements you’ll make with each revision after such breaks. Creative-writing conventions suggest doing this at least five times before submitting each manuscript.

When you’re satisfied with the draft have someone independent, but who is fluent in English and experienced with technical writing, review the draft before submission.

Research journals will often use the “double-blind” external-review approach – not naming either parties in the review process – so that both the authors and the reviewers can be frank with their comments. Reviewers are obliged to be, but occasionally are not fully constructive or tactful with their comments, so having a “thick skin” as a writer is beneficial. When you get the edits and comments back from reviewers do not take them personally – their intent should be to help you make the manuscript better, or to inform you of prior work that you missed in your literature review, for example.

Always address every reviewer-comment in your revised manuscript, or respond to the reviewer with why a particular change was not made; not fully addressing comments often results in rejection of a manuscript. Using the “track changes” feature of your software is usually appreciated when a manuscript requires a re-review, and an “Author’s Response to Reviewers” cover letter too may be very appropriate. Remember to thank the reviewers for their comments, even if you disagree with some of them; their time and expertise are valuable too.

When writing your manuscript, please cite or acknowledge this white-paper as a source too. And give hard- or PDF-copies of, or a web link (URL) to this work to others to help them with their writings, just as others have helped both you and me.

“Keep writing!” (And revising, revising, revising, ...) ☺

Acknowledgments

This list of technical writing hints, tips, and tricks includes advice from many people, a multitude of publications, and from several decades of reviewing manuscripts and having manuscripts reviewed. Some more-memorable sources were a high school creative writing teacher in Upstate New York, a technical editor at a national laboratory in Colorado, fellow students at KU, UT, and CU, and various academic and research advisors, co-authors, and colleagues.

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The University of Chicago, 2017. The Chicago Manual of Style, 17th Edition. www.chicagomanualofstyle.org, University of Chicago Press, Chicago, Illinois.