



Guidance for preferred grammar, spelling and referencing

**DPC Style Guide**

Version 7, October 2022

# Introduction

The preferred grammar and usage of the DPC is based on the Chicago Manual of Style (17th ed.), though it has some deviations. Referencing is based on the Harvard in-text (or author-date) system. This Style Guide is not exhaustive but provides basic guidelines relevant to ensuring DPC publications remain clear and consistent as possible, acknowledging that digital preservation encompasses a broad range of disciplines with different grammar and usage conventions. If an author is unsure of a point of grammar or usage, they should consult the source guidelines (mentioned above) or clarify with the DPC.

For clarity, the examples of correct grammar/style used in this document are highlighted in green.

Summary of changes in version 7:

1. Inclusive language guidance added
2. Edits and clarifications added to references section

Summary of changes in version 6:

1. Glossary preferences
2. Archive/repository terminology

Summary of changes in version 5:

1. Simplified bullet point list punctuation to always use full stops.

Summary of changes in version 4:

1. Website references no longer use footnotes, making them consistent with the referencing of other works.
2. In text references should include a live hyperlink where appropriate.
3. Other minor formatting changes to align more closely with Harvard style referencing.
4. Cross references are more tightly defined and should use the MS Word cross referencing feature.
5. A variety of minor changes for clarity and understandability.

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## Spelling

* As a general guide to spelling, DPC prefers the first spelling given in the Oxford English Dictionary. This preference gives priority to certain norms including ‘z’ spellings (for example, ‘digitization’ not ‘digitisation’ and ‘organize’ not ‘organise’), though it provides commonly used exceptions: advertise, advise, analyse, chastise, compromise, improvise, televise. Some other preferred spellings include artefact, medieval, homogeneous, millennium.
* Foreign place names consistently follow either the anglicized or the country of origin’s form, but not both in the same work.

## Terminology and use of inclusive language

* Use inclusive language that will not cause offense to any individuals. There are particular words and phrases that can come up when talking about digital preservation which should be avoided, for example:
  + Avoid using the term ‘master’ files - use terms like ‘preservation TIFFs’, ‘primary files’ or ‘original digitized images’ instead.
  + Avoid ‘sanitizing’ or ‘cleansing’ file names to get rid of non-ASCII characters – use more neutral language such as ‘file names were changed’ instead.
  + Avoid using the terms ‘blacklist’ or ‘whitelist’ – use the terms ‘disallow’ and ‘allow’ instead.

There are many guides to inclusive language online, and some that have a particular focus on words to avoid when working in a technical context (for example, <https://www.madetech.com/blog/inclusive-language-in-tech/>).

* When referring to an organisation that is preserving digital content, it can be important to use a term that is appropriate for the situation and context. For example, if discussing preservation within an academic context, the term “institution” might be appropriate. However, it’s important to appreciate that the DPC is made up off a broad community of organizational types from many different sectors. “Repository” can therefore be a useful and neutral way to describe a preserving organization when there is no specific context to reference.

## Grammar and Usage

### Abbreviations and acronyms

* Full stops are used for abbreviations that end in a lowercase letter: p. (page), vol., e.g., i.e., etc., a.k.a., a.m., p.m., Ms., Dr., et al. (‘et’ is not an abbreviation; ‘al.’ is).
* Full stops are used for initials standing for given names: E. B. White; but are not used for an entire name replaced by initials: JFK.
* There are no full stops with abbreviations that include two or more capital letters, even if the abbreviation also includes lowercase letters: VP, CEO, MD, PhD, UK, US, NY, and so on.
* In main text, ‘for example’ and ‘such as’ are used rather than ‘e.g.’. Similarly, ‘that is’ rather than ‘i.e.’, and ‘and so on’ rather than ‘etc’ (although these may be used in tables). A comma precedes ‘e.g.’. Full stops are used in ‘i.e.’, ‘e.g.’ and ‘et al.’.
* At the first occurrence of an acronym, the full name is spelt out, with the acronym in brackets following it. For example, the Digital Preservation Coalition (DPC). After that, the acronym is used.
* Page numbers are indicated by ‘p.’ followed by the number for a single page, or ‘pp.’ followed by the page numbers with no space, for example pp.12-21.

### Capitalization

* Capitals are used sparingly. They are used for proper nouns, titles (including local or central government departments, directorates or sections), and for prefixes forming part of a compound name, such as the Archbishop of Canterbury and the Duke of Edinburgh. Where a prefix or title is used in a general sense, it is lower case, such as ‘a duke’, ‘the president’, ‘county archaeologist’, ‘member’, and so on.
* The definite article – ‘the’ – is capitalized where it forms part of the name of an organization or institution. The definite article is also capitalized where it forms part of a title of a publication, such as The Times, or The History of Mr Polly.
* Parts of geographical names are capitalized when they refer to recognized divisions of a country. For example: Northern Ireland (a political division), but northern Scotland (a general geographical description).
* Capitals are used for names of institutions and movements, including schools of painting, so that Christianity, Buddhism, Islam, Marxism, Colourists and the Church (when it refers to the Christian Church as a whole) are capitalized.
* Words in the titles of books or exhibitions all have initial capitals, except for words such as ‘it’, ‘and’, and so on.

### Contractions

* Technology Watch Reports do not use contractions. Words like ‘it’s’ and ‘can’t’ are spelt out in full.
* For other DPC publications, such as Guidance Notes, contractions are used if preferred by the author, as long as they are consistent. All contractions should be spelt out or all contractions should remain shortened, but not both in the same work.

### Quotations

* Short quotations are incorporated into the text using single quotation marks, also called inverted commas (following the Oxford style rather than the Chicago Manual of Style). Longer quotations (usually about 100 words or more) are set off from the text by indenting or centring, without quotation marks.
* Quotations are given exactly as they appear in the original and not altered to conform to DPC Style. If any words are added or omitted, square brackets are inserted to indicate additions, and the mark of an ellipsis (…) for omissions.
* Some changes are permissible to make a passage fit into the syntax and typography of the surrounding text. Single quotation marks may be changed to double, and double to single. The initial letter may be changed to a capital or a lowercase letter. Obvious typographic errors may be corrected silently (without comment.
* Direct quotations are always indicated through attribution in the referencing system (see section 1.3).
* If a quotation is in a language other than English, it is preferred if the author provides a translation of it so that readers do not miss important content.
* For quotes within quotes, or speech within speech, double quotation marks are used.
* In quotations, the closing quotation mark comes before a final full stop. For example: ‘In most cases, the simplest way to mitigate risks with storage media is to transfer all content into a managed storage system’.
* The closing quotation mark comes after any punctuation mark that is not a full-stop (such as an exclamation mark) which is part of the text being quoted. For example: Before he opened his mouth, I knew he would say, ‘Digitization is not the same as digital preservation!.
* When the quoted speech is interrupted by a reporting verb such as ‘says’ or ‘shouts,’ and so on, the punctuation that divides the sentence is put inside the quotation marks. For example: ‘Development of services for non-technical users has come a long way,’ he argues, ‘making emulation a more viable approach’.
* If a quoted word or phrase comes at the end of a sentence or coincides with a comma, the punctuation that belongs to the sentence as a whole is placed outside the quotation marks. For example: What is ‘bit rot’?

### Cross-references

* References are made to chapter or section headings and to table and illustration numbers as far as possible. Similarly, references to ‘the table below/above’ are not used, as what appears below/above in the draft may not appear in the same location once typeset.
* The MS Word “Cross Reference” feature should be used for all cross references. This will automatically create a hot link in the final PDF report and will ensure that the reference is automatically updated if the name of the cross-reference destination changes during editing.
* When inserting an MS Word Cross Reference, the “Reference Type” should be “Heading” and the “Insert reference to:” should be “Heading number”. The cross reference should be shown in brackets. For example, a cross reference to the Spelling section of this document, should be as follows: (see section 1.1).

### Dates

* Dates are given as in the British sequence: day month year, as in 1 January 2020.
* Decades are expressed as the 1970s, not 1970’s or ‘70s.
* Names of months are not contracted, except in figures, tables, or marketing materials for reasons of space.
* The names of historical periods are usually capitalized, for example: the Middle Ages, the Jurassic, the Holocene, Iron Age, but not medieval.
* Pairs of dates are usually reduced to their shortest pronounceable form, for example: 1914–18, 1878–79. However, an oblique is used when referring to financial years because they are made up of parts of two calendar years and should be indicated as 2003/04.

### Fonts and formatting

* Fonts and other typical formatting for headings and spacing are already defined in the respective templates for Reports and for Guidance Notes. Note that main text should be Calibri size 11.
* Floating carriage returns should be avoided where possible. In particular they should not be used at the end of a paragraph or prior to a new section or sub-section. In almost all cases, spacing is adequately provided by the formatting configured in the relevant Technology Watch template. However, it is noted that MS Word’s handling of bulleted lists sometimes leads to cramped spacing that may in exceptional cases need to be separated with a carriage return.
* Avoid cut and pasting formatting and styles changes into your document, which can often introduce formatting challenges.

### Footnotes and endnotes

* Footnotes and endnotes are not used.

### Hyphens

* Hyphens are used sparingly but consistently.
* Compound adjectives are hyphenated, so ‘a nine-year-old-child’, a ‘seventeenth-century document’, but ‘the child was nine years old’, ‘the chair was made in the seventeenth century’.
* Hyphens are not used between an adverb and part of a verb used adjectivally, for example badly drawn boy, ineptly scripted presentation.
* Numbers from 21 to 99, and fractions, are hyphenated when written out, for example twenty-one, ninety-nine.

### Italics

* Italics are used for the names of books, exhibitions, paintings, journals and magazines, newspapers, plays, films, legal cases, epic poems, and ships (although HMS and SS in ships’ names are not italicized).
* Many words from other languages are commonly italicized, although there is no need to italicize words that are now common in English language usage. For example, vice versa, chic, ersatz, naïve, facade and prima facie do not need to be italicized, although ipso facto, Zeitgeist, ibid., et al. and ad hoc often are.

### Lists

* Items in a list are separated by commas. When a conjunction joins the last two elements in a series of three or more, a comma (called a serial comma or Oxford comma) should appear before the conjunction to prevent ambiguity. For example:

There are several options for storage, such as optical disk, magnetic tape, and cloud storage.

* If the last element consists of a pair joined by ‘and’, the pair should still be preceded by a serial comma and the first ‘and’. For example:

Best practice for a long-term web archiving programme avoids approaches like print to PDF, screenshots, and copy and paste.

* A bullet point list should have a full stop at the end of every bullet point. For example:

His aims were to:

* research all the commercially available repository systems.
* compare their functionality and costs.
* consult the DPC Executive Guide and Business Case Toolkit.
* create a business case to present to his management team.

### Numbers and measurements

* In the text, numbers up to ten are spelt out; after that, numerals are used. The exception is when a number starts a sentence, as then it should be written out in full.
* If a percentage contains a decimal point, as in 5.4%, numerals are used.
* Numbers from 21 to 99, where spelt out, and fractions, are hyphenated, such as twenty-one and two-thirds.
* The percentage sign (%) is used in tables, illustrations, and text.
* A ‘0’ is used in front of decimals. For example: 0.6.
* The abbreviation ‘No.’ is used for ‘number’.
* Numerals are used for measurements and weights, for example: 3 metres, 25 km, 4 kg. When citing measurements, use a form that conveys the precision of the measurement, for example: the ditch is 0.85m wide, the brooch is 35mm wide and 87mm long, not the ditch is 850mm wide, the brooch is 0.035m wide and 0.087m long.
* Numbers from 1,000 onwards use commas as it makes numbers easier to read. Note no full stops in am/pm for times of day.
* Numbers are reduced to the shortest form consistent with clarity. For example: 254–8, 343–7, but 214–18.

### Punctuation

* Colons and semi-colons are followed by a lowercase initial letter, except where the colon precedes a quotation or the subtitle of an exhibition or book. For example: Practical Digital Preservation: A how-to guide for organizations of any size.
* Full stops are not used at the end of headings or lists of single words.
* Ampersands are not used in text but may be used to save space in tables.
* The % sign is used in tables and captions but spelt out as ‘per cent’ in running text.
* Double spaces between words should not be used.

## References

This section gives an overview of how DPC publications acknowledge quotations and references derived from the work of other individuals and institutions. The DPC Style Guide uses the Harvard (or author-date) system of referencing, with some minor differences in formatting. The author and publication date are given in the text, and a full reference given in the list of references at the end of the publication. The in-text reference includes a hyperlink to any live web-based resource, and the matching reference at the end will link to a web archived version of the same resource.

### The in-text reference

* The in-text reference provides the anchor within the main body of text which is paired with an entry in the more detailed information found in the References section at the end of the document (see section 1.3.2). It should follow the Harvard author/date format.
* An example in-text reference:

Experienced professionals (Brown, 2013) emphasize the importance of using real examples of digital assets at risk when presenting a business case.

* Where a page number within the referenced material needs to be given, this should be recorded as follows:

Experienced professionals (Brown, 2013, p.36) emphasize the importance of using real examples of digital assets at risk when presenting a business case.

* If the author’s name forms part of the sentence, it is not repeated in the reference. For example:

Brown (2013) argues that ‘the benefits of ensuring their preservation, and the consequential impact arising from their loss, can then be measured in terms that will resonate most strongly with the organisation’.

* Where the work has an associated DOI or URL, this should be provided as a hyperlink to the live web, on the author’s name. For example: ([Brown](https://doi.org/10.2218/ijdc.v2i1.10), 2013). Note that a DOI is preferred to a URL, if available.
* If there is no publication date, the reference should indicate that with “n.d.” instead of the year.
* If the author published more than one work in a year, publications are labelled (2014a) and so on. If more than one work by the same author is included in a reference, it appears as (2014a, b).
* Citations of references with three or more authors give all the authors at the first instance. For example: (Williams, Burnap, and Sloan, 2017) shortened to (Williams et al., 2017) thereafter.
* References to two or more works given together are separated by semicolons, for example: (Brown and Thomson, 2003; Brown and Smith, 2004).
* When an association, agency, or organization has produced the publication, and no author’s name appears on the title page, the name of the organization will act as the author.
* Where a work has a compiling editor or editors rather than an author, the reference indicates this with the word “Eds”, for example: (Brown and Thomson, Eds, 2003).
* Some works are not associated with a particular author, such as web pages for software tools. In this case an appropriate alternative can be used in place of the author name, such as the name of the website. For example, the ffmprovisr software tool webpage can be referenced as follows: ([ffmprovisr](https://amiaopensource.github.io/ffmprovisr/), 2019).
* When citing unpublished material, if the reader will be able to obtain the work without too much difficulty (for example, a thesis lodged at a university), a reference is included, preferably with a DOI or URL. If the material is in preparation or in press, but confirmed as accepted for publication, as much information about the source of the material is given and the entry marked as ‘forthcoming’.

### The references section

* All in-text references should be paired with a [full reference description, in author/date Harvard format](https://en.wikipedia.org/wiki/Parenthetical_referencing#Examples), in the References section at the end of the document.
* References are listed in alphabetical order by author surname, with titles by the same author listed chronologically. Works by the author individually are listed before works co-written or works which the author has edited. Joint works are listed alphabetically by second author.
* When an association, agency, or organization has produced the publication, and no author’s name appears on the title page, the name of the organization usually acts as the author, and should match with the in-text reference.
* URLs in the references section should point to a version in a web archive if possible (as opposed to the in-text URL, which should point to the live web). For example:

Witness.org (n.d.). *Video Archiving.* Available at: <https://web.archive.org/web/20210108142419/https://archiving.witness.org/>

* If it is not possible to provide a URL to a web archived version of the work (for example, it’s behind a paywall, so it’s only possible to link to the access page), a date of access should be provided in square brackets at the end.

ISO (2012). *ISO 14721:2012. Space data and information transfer systems — Open archival information system (OAIS) — Reference model*. Available at: <https://www.iso.org/standard/57284.html> [accessed 8 January 2021]

* Some web archives provide their own guidance on how to cite one of their resources. Authors can find further guidance on citing archived web content from the [UK Government Web Archive](https://www.nationalarchives.gov.uk/help-with-your-research/citing-records-national-archives/#section8), the [Bodleian Libraries’ Web Archive](https://libguides.bodleian.ox.ac.uk/web-archives), and the [National Records of Scotland Web Archive](https://www.nrscotland.gov.uk/research/researching-online/the-nrs-web-continuity-service/guidance-on-copyright-and-re-use-of-nrs-web-archive-content).
* If a web archived version is not available, it can be added to the Internet Archive using the [Save Page Now](https://web.archive.org/save/) function.

### Example references

The following text provides an example of in-text referencing for the following works: A book, an eBook, an eJournal paper and a software tool:

This is an in-text reference to a book (Harvey and Weatherburn, 2018) that is followed by an in-text reference to an eBook ([Driscoll and Pierazzo](https://doi.org/10.11647/OBP.0095), Eds, 2016) which is followed by an in-text reference to an eJournal paper ([Williams, Burnap, and Sloan](https://doi.org/10.1177%2F0038038517708140) 2017) and the sentence is completed with an in-text reference to a software tool ([ffmprovisr](https://amiaopensource.github.io/ffmprovisr/) n.d.).

And the corresponding text for the References section would be:

Harvey, R. and Weatherburn, J. (2018) *Preserving Digital Materials*. 3rd edn. Lanham, MD: Rowman & Littlefield

Driscoll, M.J. and Pierazzo, E. (eds.) (2016) *Digital Scholarly Editing: Theories and Practices*. Available at: <https://web.archive.org/web/20220119152149/https://books.openbookpublishers.com/10.11647/obp.0095.pdf>

Williams, M.L., Burnap, P., and Sloan, L. (2017) *Towards an Ethical Framework for Publishing Twitter Data in Social Research: Taking into Account Users' Views, Online Context and Algorithmic Estimation*. Sociology 51(6), pp.1149-68. Available at: <https://web.archive.org/web/20220501184643/https://journals.sagepub.com/doi/10.1177/0038038517708140>

ffmprovisr (n.d.). *ffmprovisr*. Available at: <https://web.archive.org/web/20201209131300/https://amiaopensource.github.io/ffmprovisr/>

Note that the DOI to the eBook reference points to the publishers landing page. Providing this URL to the Wayback Machine fails to save the actual text of the eBook. Instead, the URL to the PDF was more successfully archived.

## Other inclusions

### Appendices

These are included if they provide access to details that are too bulky or repetitive to include in the main text. Appendices are numbered consecutively, included in tables of content, and referenced as per cross references (see section 1.2.5).

### Glossary

Glossary entries may use a citation if helpful, but this is not mandatory. Where a citation is used, it should follow the standard form and be listed in the references.

### Further reading

All sources provided in this section follow the style of the references (as in section 1.3) but may contain short annotations or a brief description of the contents of the resource by the author.

*DPC acknowledges the generous assistance of Susan Pacitti (Glasgow Museums) in preparing this document.*