PRESENTATION OF REFERENCES, QUOTATIONS AND BIBLIOGRAPHICAL ENTRIES

TRANSLATED AND ADAPTED BY KAREN SHERMAN

(VERSION ORIGINALE EN FRANÇAIS)



Important: When you present someone else's work as your own, you commit plagiarism. Plagiarism is an act of fraud that can incur sanctions ranging up to expulsion from HEC Montréal. Any total or partial reproduction (be it a few words, a couple of lines or more than one page) of a text written by another author, along with any quotation of ideas, must include the exact reference to the source, regardless of whether the original text is a printed or electronic document (see Appendix for examples of plagiarism). For more information, please

consult the **biblioguide** <u>Citer ses sources</u> (HEC Montréal, 2011a). To avoid unintentional plagiarism, it is recommended that when taking notes you clearly distinguish all information (full or partial sentences and ideas) taken from other authors.

1 Presentation of references and quotations in a text

Here are some ways to refer to other authors' works in your own texts using the *author*, *date* method, which is preferred in most fields, rather than the footnote (see Section 3).

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Exact reproduction of another person's words and reference in the text according to the author, date method

Examples¹:

Quotation of a complete sentence

"He's the one who will give our young people, most of whom are budding Craftsmen, a chance to get started" (Pitcher, 1995: 187).

Run-in quotation integrated in a sentence

Regarding the role of the Craftsman vis-à-vis the younger generation, "he's the one who will mentor, empower and teach and train and invest in them" (Pitcher, 1995: 187).

Run-in quotation that is slightly modified as part of a sentence²

"The Craftsman [...] will give our young people, most of whom are budding Craftsmen, a chance to get started" (Pitcher, 1995: 187).

Run-in quotation preceded by a preposition such as according to

According to Pitcher (1995:187), "the important thing for the Craftsman is less that the person displays what they know and what they want to learn to do".

Or:

According to Pitcher (1995), "the important thing for the Craftsman is less that the person displays what they know and what they want to learn to do" (187).

Run-in quotation introduced by a speech verb³
 followed by the conjunction that

Pitcher (1995) asserts that "the Craftsman is the preserver and the mentor" (187).

Punctuation

Always enclose a **short quotation*** in quotation marks. Use italics for a short quotation if it is in any language other than English (if you are writing in English).

The reference that follows the quotation is placed after the closing quotation mark ("), between parentheses and before the final punctuation mark of the sentence. In parentheses, the **author's name and date** are separated by a comma. The **reference to the page**⁴ is the last item inside the parentheses.

* The short quotation, normally of three lines or fewer, is differentiated from the long quotation, more three lines long.

Long quotations are set off from the text, indented to the right (in block format) and are single spaced. The long quotation is not enclosed in quotation marks and is generally written in font one or two points smaller. Use italics only if the quote is in a foreign language (if necessary offer a translation of the quotation in a footnote, followed by the comment our translation between parentheses).

Patricia Pitcher, Artists, Craftsmen and Technocrats: The Dreams, Realities and Illusions of Leadership, Toronto: Stoddart, 1995, 289 p.

Here, the brackets indicate a transformation of the original text. For example: "The Craftsman [...] will give our young people, most of whom are budding Craftsmen, a chance to get started." The brackets represent a phrase in the original text that is not pertinent to the student's text, so it has been omitted.

A speech verb is a verb that reports a person's words or thoughts, for example *affirm, believe, say, think, explain, note, observe, clarify, argue.* In this context, these verbs are generally followed by a subordinate clause beginning with the word *that.*

To indicate the page reference, the colon is increasingly used, rather than the abbreviation "p." (for example: According to Pitcher (1995: 187). Page indications are necessary only when there is a quote in quotation marks.

Translation and paraphrasing of someone else's words or ideas

Original Text

"TROISIÈME NIVEAU DE COMPÉTENCE : INFLUENCER, MOTIVER ET GÉRER

Il s'agit du niveau de compétence communicationnel le plus élevé, celui qui permet une gestion sur le plan mondial."

Olivier Irrmann, "Parlez-vous international? Capacité communicationnelle et internationalisation." *Gestion*, Vol. 31, no. 1 (Spring 2006):112.

Paraphrase

The third level of competence entails influencing, motivating and managing. At the highest level, it gives rise to global management (Irrmann, 2006).

This is a paraphrased excerpt of a direct translation of a text by Irrmann. You do not need to indicate that it is a translation because it is not a direct quotation. Otherwise you should put the words **our translation** in parentheses after the quote (p.13).

Reformulation and paraphrasing of someone else's words or ideas

Example⁵:

In the neoclassic economic literature (Bushman and Smith, 2001; La Porta *et al.*, 2000; Shleifer and Vishny, 1997), governance is defined primarily as a means of protecting investors.

Here, the reformulation summarizes the thoughts of several authors ⁶: it is different from the original but conveys the converging ideas of the authors.

Paraphrasing and synthesis should always be used more frequently than quotations. The next example – a quotation within a quotation – should be used only when you cannot consult the work or article by the author cited in the original text.

Quotation within a quotation (reference to an author cited by another author)

Example:

The examination in context of not-for-profit organizations should consider "both external and internal contingencies" (Ostrower and Stone, 2006: 612, cited by Turbide *et al.*, 2008: 7)

All references within the text (in the example above Turbide *et al.*, but not Ostrower and Stone) must also appear in the bibliography of your text where the bibliographical entry must be complete.

⁵ J. Turbide, C. Laurin, L. Lapierre, and R. Morissette. "Financial Crises in the Arts Sector: Is Governance the Illness or the Cure?" *International Journal of Arts Management*, Vol. 10, no. 2 (Winter 2008): 4-13.

If you summarize the thoughts of several authors who are not co-authors, the references between parentheses must be separated by semicolons, for example (Villers, 2003; Malo, 1996). If your bibliography includes at least two texts by the same author published in the same year, add a lowercase letter without a space following the year of publication (e.g. Mintzberg, 1990a or Mintzberg, 1990b, etc.).

2 Presentation of bibliographical entries

There are several ways to present bibliographical references. The important step is to choose a presentation style, bearing in mind the types of reference documents (books, journal articles, websites, etc.), and to use this style consistently throughout the bibliography. To help you, the HEC Montréal library currently offers *EndNote*, bibliography management software, which is free to use. Simply select the style, for example, <u>style bibliographique HEC Montréal</u> (HEC Montréal, 2011b), which resembles the style below. The guidelines below are intended to help people who do not use the software.

Below we suggest an order for information found in a standard bibliographical entry.

Information and typography	Punctuation and spacing
1. Author's name,	Comma
Include accents on capital letters, if applicable.	Space
2. Author's first name	Space
If applicable:	
, and First name of second author Last name	Period
4. Title of work	
Or:	Period
Title of work: Subtitle of work	Space
5. Additional information (if applicable)	Comma
E.g.: edited by John Doe, 2nd ed., doctoral thesis	Space
6. Place of publication	Colon
	Space
7. Publisher's name (do not mention "Publications" or "Publisher")	Comma
	Space
8. Name of collection	Comma
	Space
9. Year	Comma
	Space
10. Number of pages p	Period

Examples:

Pitcher, Patricia. *Artists, Craftsmen and Technocrats: The Dreams, Realities and Illusions of Leadership.* Toronto: Stoddart, 1995, 239 p.

Pauchant, Thierry C., and Ian I. Mitroff⁷. *Transforming the Crisis-Prone Organization*. San Francisco: Jossey-Bass, 1992, 255 p.

When using the author, date method, always separate the names of two authors cited in the text by the word and, for example (Pauchant and Mitroff, 1992).

Here are some examples of more complex bibliographical entries.

♦ Article in a periodical

Author's Last name, First name. "Title of article: Subtitle of article." *Title of periodical*, Vol. 00, no. 0 (Month Year): first page-last page.

Pozzebon, Marlei. "The Influence of a Structurationist Perspective on Strategic Management Research." *Journal of Management Studies*, Vol. 41, no. 2 (March 2004): 247-272.

Ayayi, Ayi. "Les particularités du marché du capital de risque." *Gestion*, Vol. 26, no. 4 (Winter 2002): 23-33.

♦ Translated work

Author's last name, first name. *Title of translation* (English/French version... of *Title in original language*, X ed. (additional information if applicable, trans. by Translator's First name Last name). City of publication: Publisher, Year, Number of pages p.

E.g.: Parkin, Michael, Robin Bade, and Benoît Carmichael. *Introduction à la macroéconomie moderne*. 2nd ed. (French version of *Macroeconomics – Canada in the global environment*, 3rd ed., Parkin, Michael, and Robin Bade, 1997, trans. by Geneviève Boury, and Suzanne Geoffrion). Montréal: ERPI, 2002, 577 p.

♦ Work or article published by more than two authors⁸

Guffey, Mary Ellen, Kathleen Rhodes, and Patricia Rogin. *Business Communication: Process and Product.* Scarborough: Nelson Canada, 1996, 601 p.

Bourhis, Anne, Alain Gosselin, Michel Tremblay, and Thierry Wils. *Gestion des ressources humaines - Mises en situation et cas.* Montréal: ERPI, 2000, 236 p.

Colbert, François, Alain d'Astous, and Marie-Agnès Parmentier. "La commandite des arts et de la culture par le secteur privé par opposition au secteur public: qu'en pensent les consommateurs?" *Gestion*, Vol. 30, no. 2 (Summer 2005): 10-15.

In the bibliography, specify all the authors whose names are written on the cover of the book. In the text, using the author, date method, when you refer to a document with **3 to 5 authors** cite all the authors the first time. Subsequently, cite only the name of the first author followed by et al. unless there is a risk of confusion with another work. Always use et al. if there are more than five authors. Note that the Latin abbreviation et al. should be in italics (e.g. Guffey et al., 1996).

♦ Collective work in which distinct parts are associated with different authors

WORK CONTAINING SEVERAL ARTICLES OR CHAPTERS WRITTEN BY DIFFERENT AUTHORS

Last name, First name of editor (ed.). *Title of work.* City, Publisher, Name of collection, Year, Number of pages p.

E.g.: Byram, Michael, and Peter Grundy (eds.). Context and Culture in Language Teaching and Learning. Clevedon: Multilingual Matters, Languages for Intercultural Communication and Education, 2003, 105 p.

ISSUE OF A SPECIALIZED JOURNAL

Last name, First name of editor (ed.). "*Title of issue*." *Name of journal*, no. 00 (Month). City: Publisher, Year, Number of pages p.

E.g.: Boch, Françoise, and Francis Grossmann (eds.). "Apprendre à citer le discours d'autrui," *Revue de linguistique et de didactique des langues*, no. 24 (December). Grenoble: Université Stendhal, 2001, 181 p.

Text published in a collective work

Author's last name, first name. "Title of article," in *Title of work,* Editor's first name and last name (ed.). City: Publisher, Name of collection, Year, first page-last page.

E.g.: Harel-Giasson, Francine. "Femmes gestionnaires – L'actrice et l'organisation," in *l'Individu dans l'organisation: Les Dimensions oubliées*, Jean-François Chanlat (ed.). Québec: Presses de l'Université Laval and Eska, Sciences de l'administration, 1990, 407-416.

E.g.: Holtzer, Gisèle. "Learning Culture by Communicating: Native-Non-Native Speaker Telephone Interactions," in *Context and Culture in Language Teaching and Learning,* Michael Byram and Peter Grundy (ed.). Clevedon: Multilingual Matters, Languages for Intercultural Communication and Education, 2003, 43-50.

♦ Thesis or dissertation

Collard, Janice. *The Theme of Rebirth in Canadian Drama*. Master's thesis, McGill University, McGill-Queen's University Press, 1989.

D'Astous, A. *The Use of Nonanalytic Cognitive Processes in Consumer Evaluative Judgment Making*. Ph. D. dissertation, University of Florida, 1985.

Paper presented at conference

CONFERENCE, PAPER PRESENTED AT A SYMPOSIUM, CONVENTION

Speaker's Last name, First name. "Title of conference," paper presented at name or *Title* of convention, Name of organization if applicable. City, State, or Country (if city not well known), Month Day, Year.

E.g.: Grad, Karene. "When High Culture Was Popular Culture," paper given at the annual meeting of the Organization of American Historians. Boston, MA, March 26, 2004.

■ IN CONFERENCE PROCEEDINGS

Speaker's Last name, First name. "Title of text," in *Name of proceedings*, proceedings of the conference held on Month Day, Year, other information if applicable, Editor's First name Last name (ed.), City of publication: Publisher, Name of collection, no. 00, Year of publication, first page-last page.

E.g.: Villers, Marie-Éva de. "La presse écrite: illustration d'une norme implicite," in *La représentation de la norme dans les pratiques terminologiques et lexicographiques,* proceedings of the conference held on May 14 and 15, 2001 at Université de Sherbrooke as part of the 69th ACFAS CONFERENCE, Pierre Bouchard and Monique C. Cormier (eds.), Québec: Office de la langue française, Langues et Sociétés, no. 39, 2002, 49-75.

Research manual, research report or working paper

Miller, David C., Anindita Sen, and Lydia B. Malley. *Comparative Indicators of Education in the United States and other G8 Countries: 2006*, report No. GPO ED003826P. Washington, DC: National Center for Education Statistics, Institute of Education Sciences, U.S. Department of Education, 2007. http://nces.ed.gov/pubsearch/pubsinfo.asp?pubid=2007006

Houle, Alain. Le rôle de l'information chez les gestionnaires des P.M.E. exportatrices du Québec, research report. Montréal: École des hautes études commerciales⁹, 1994.

Denis, Jean-Émile. *Une synthèse de la recherche sur le comportement des firmes à l'exportation*, working paper No. 15. Ottawa: University of Ottawa, 1990.

The official name *HEC Montréal* was adopted in 2002. Before this date, the full name was used: *École des hautes études commerciales*. This name can still be used, providing you capitalize the first word only, as recommended by the OQLF.

• Reference to an online document

Government of Canada. "Access to Statistics Canada's electronic publications at no charge," *The Daily* [online], Statistics Canada, http://www.statcan.ca/Daily/English/html. (Accessed April 24, 006).

Lapointe-Giguère, Micheline, and Yolande Perron. *Vocabulaire de la prestation de services*, Québec, Gouvernement du Québec, 2004. http://www.oqlf.gouv.qc.ca/ressources/bibliotheque/dictionnaires/vocabulair e prestation services 20040611.pdf. (Accessed September 4, 2004).

Négothèque [online database], Ottawa, Government of Canada, http://206.191.16.137/gol/. (Accessed July 14, 2005).

Software program or CD-ROM

Antidote Prisme, Version 5 [software], Montréal: Druide informatique, 2004.

"Acquired Immunodeficiency Syndrome." In MESH vocabulary file [database on-line]. Bethesda, Md.: National Library of Medicine, 1990 [cited October 3, 1990]. Identifier No. D000163. [49 lines.].

Villers, Marie-Éva de. *Multidictionnaire de la langue française*, electronic version [CD-ROM], Montréal: Québec Amérique, 2001.

♦ Email

Rocray, Claude (crocray@mail.dcrp.hydro.qc.ca). *Document de l'OLF*, [email to Lise Maisonneuve] (Imcat@microtec.net), October 31, 1997.

Grutman, Rainier (grutman@uottawa.ca). *Le cas Richler,* [e-mail to Claude Rocray] (crocray@mail.dcrp.hydro.qc.ca), November 3, 1997. Original message: *Mordecai Richler,* by Benoît Melançon.

♦ Annual report (online)

Author's Last name, First Initial or Corporate Author Name. Year of Publication. *Title*. Retrieved from URL

Sample Citation:

Honda Motor Co. 2004 Annual report. Retrieved from http://world.honda.com/investors/annualreport/2004/07.html.

♦ Interview

■ FORMAL INTERVIEW

Last name and first name of person interviewed. "Title of interview," if applicable, *Title of television or radio program where interview was broadcast*. Interview conducted by First name, Last name, Day, month year at City, produced by First name Last name, City, Station, Day Month Year of broadcast, 00:00.

■ INFORMAL INTERVIEW

Last name and first name of person interviewed. Personal Interview. Date.

♦ Radio and television programs

Title of program. Name of episode, Written by First name Last name, Directed by First name Last name, Station, City, Day, Month, Year of broadcast, 00:00.

Reference to a film

Last name, First name of director (dir.). *Title of film.* City: Edition, Year of broadcast, 00:00.

3. Footnotes

As mentioned in Section 1, the *author, date* method is preferred in texts and articles in several fields, rather than footnotes. In a text where the *author, date* method is used, footnotes are generally reserved for comments or theoretical clarification.

Example¹⁰:

For several years, many organizations have favored the creation of this type of community as hubs of creation and sharing of knowledge as part of a process of knowledge management and development (Deloitte Research, 2001). Continuity in dissemination of knowledge is indeed indispensable to effective succession management (Saba, 2003). In addition, the author underline that implementation of communities allows one to put in place open communication channel that seek transparency.

[...]

Pilot projects entail experimentation and a learning profile. The following pages which are dedicated to one of these projects, that of the information solution department, illustrate the changes challenges faced and those inherent in putting in place the cooperation and sharing networks.⁵

5. Data were gathered using formal interviews and discussions with the following individuals: people engaged directly in the succession management program, members of the DSI department participating in implementing the network, a network manager and some participants. [...]

However, sometimes you need a footnote to indicate bibliographical references. In this case, it is good to know the main presentation rules and the most commonly used Latin abbreviation, to avoid repetition.

Reference elements placed in a footnote are generally the same as those included in the bibliography, but the order and punctuation differ. For example:

Note Number Author's First name Last name, *Title of work: Subtitle* (City: Publisher, Year), first page-last page.

E.g.:

1 Marie-Éva de Villers, *Multidictionnaire de la langue française* (Montréal: Québec Amérique, 2009), 100-102.

¹⁰ This example is our translation of an excerpt from Bourhis, Anne, Line Dubé and Réal Jacob, "La contribution de la gestion des connaissances à la gestion de la relève: le cas Hydro-Québec," *Gestion*, Vol. 29, no. 3 (Fall): 2004, 73-81.

Currently only one Latin abbreviation is used to avoid repetition when the same work is cited more than once.

♦ Ibid. (for ibidem), meaning "in the same place"

This abbreviation is used **when you cite the same document in consecutive notes**. Starting from the second note, use the abbreviation *Ibid.*, followed by a comma, and the new page number cited, if applicable.

E.g.: 1 Villers, Multidictionnaire de la langue française (Montréal : Québec Amérique, 2009), p. 100-102. 2 Ibid., 1250. 3 Ibid.

For subsequent references in non-consecutive footnotes, simply write:

1 Villers, Multidictionnaire de la langue française, 1252.

APPENDIX: Examples of excerpts plagiarized and cited correctly 1. Examples based on a text published in English

Author's original text

[...] The Craftsman is the preserver and the mentor. Since when have realism and conviction become outmoded, old-fashioned? He's the one who will give our young people, most of whom are budding Craftsmen, a chance to get started. He's the one who will accept them into the organization even if they are not "brilliant". He won't ask them if they are charismatic. He doesn't expect them to be. He will ask them what they *know* and whether they have the desire to *learn how to do*. He's the one who will mentor, empower and teach and train and invest in them. The Artist hasn't got the time. And the Technocrat hasn't got the inclination. [...] (p. 187)

Source: Patricia Pitcher. *Artists, Craftsmen and Technocrats: The Dreams, Realities and Illusions of Leadership.* Toronto, Stoddart, 1995, 239 p.

Plagiarism: prohibited

This section describes the characteristics of the "Craftsman" type manager compared with the "artist." The Craftsman is above all a preserver and mentor (Pitcher, 1995). He gives young people, most of whom are budding Craftsmen, a chance to get started. The mentor is also the one who will accept them into the organization even if they are not brilliant. The important thing, for the Craftsman, is to know that a person wants to learn how to do. Lastly, the craftsman is the one who will mentor, empower and teach and train and invest in young people.

As for the Artist type manager, he ...

Citation: permitted

This section describes the characteristics of the "Craftsman"- type manager compared with the artist. Pitcher (1995) considers the Craftsman above all as a preserver and the mentor. In addition, "He's the one who will give our young people, most of whom are budding Craftsmen, a chance to get started" (Pitcher, 1995: 187). According to this author, the important thing for the craftsman is less that the person displays what they know than that they want to learn how to do. In effect, the craftsperson will invest with youth in their learning. In short he is the one who will mentor, empower and teach and train and invest in them" (Pitcher, 1995: 187).

As for the Artist type manager, he

CHARACTERISTICS:

- Parts of phrases copied without crediting the author.
- Reference to an original author associated with only part of his text.
- Appropriation, by the student of the author's ideas.

CHARACTERISTICS:

- Reference to the original author when his/her words and ideas are reported directly or indirectly.
- Direct textual citations surrounded by quotation marks and followed by reference, including page number.
- Paraphrasing or synthesis of the author's words accompanied by reference to the author.

APPENDIX (continued)

2. Example based on a text published in French

Author's original text

[...] Nous proposons de distinguer trois niveaux de compétences communicationnelles et interculturelles illustrant le passage progressif à travers ces différents niveaux d'apprentissage et de connaissance de la langue et permettant de gérer sur différents plans une activité d'internationalisation de l'entreprise.

Premier niveau de compétence : décoder et échanger [...]

Troisième niveau de compétence : influencer, motiver et gérer

Il s'agit du niveau de compétence communicationnel le plus élevé, celui qui permet une gestion sur le plan mondial. À ce niveau, on est en mesure de comprendre les différentes manières d'utiliser le langage dans différents contextes et d'éviter au maximum de faire des erreurs pragmatiques. [...] (p. 112)

Source: Olivier Irrmann, "Parlez-vous international? Capacité communicationnelle et internationalisation," *Gestion*, Vol. 31, no. 1 (Spring 2006), 108-117.

Plagiarism: prohibited

We are interested in intercultural communication in an international management context.

Particularly, we examine the very high level of communication competence: influencing, motivating and managing because it fosters global management. In fact, it consists in "understanding different ways of using language in different contexts and maximally avoiding making pragmatic errors" (Irrmann 2006). This competence...

in an international management context.

Particularly, we examine the very high level of communication competence. According to Irrmann, "influencing, motivating and managing [...] fosters global management" (Irrmann, 2006: 112, our translation). The author argues that this competence consists in understanding

Citation: permitted

We are interested in intercultural communication

112, our translation). The author **argues** that this competence consists in understanding different language uses while avoiding errors associated with the context of language use. This competence...

CHARACTERISTICS:

- Parts of phrases copied without crediting the original author.
- Paraphrasing part of original text without crediting the author
- No mention that the student translated the source text.
- Appropriation, by the student, of the author's ideas.

CHARACTERISTICS:

- Reference to the original author when his/her words and ideas are reported directly or indirectly
- Quotation marks indicate textual citations
- Paraphrasing or synthesis of author's words, and reference to the author.
- Fact that student provides translation of source text specified.
- Introduction of reported speech or ideas using a verb such as affirm, say, clarify and argue.

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Chassé, Dominique, and Greg Witney. *Guide de rédaction des références bibliographiques*. Montréal: École Polytechnique de Montréal, 1997, 178 p.

Clearwater, Dr. David. *Citation Guide: Footnotes and Bibliographical Entries (Turabian/Chicago Citation Style)*. University of Lethbridge New Media, last updated February 2010. http://people.uleth.ca/~cleada/docs/SampleCitations%28Turabian%29.pdf. (Accessed February 27, 2012).

ISO (2002). *Extraits de la Norme internationale: ISO 690-2* [online]. Ottawa: Library and Archives Canada. http://www.collectionscanada.ca/iso/tc46sc9/standard/690-2f.htm (Accessed October 5, 2004).

Malo, Marie. Guide de la communication écrite au cégep, à l'université et en entreprise. Montréal: Québec Amérique, 1996, 322 p.

Public Works and Government Services Canada Translation Bureau. *The Canadian Style*, http://www.termiumplus.gc.ca/tcdnstyl-chap?lang=eng&lettr=chapsect9&info0=9#zz9, (Accessed February 29, 2012).

Purdue Online Writing Lab. "APA Formatting and Style Guide", Purdue University. http://owl.english.purdue.edu/owl/resource/560/01/. (Accessed February 29, 2012).

Service des Bibliothèques de l'UQAM. "Citer ses sources," *Infosphère*, version 1.3, updated July 5, 2004 [online], Montréal: Université du Québec à Montréal, [http://www.bibliotheques.uqam.ca/InfoSphere/sciences_humaines/evaciter3.html. (Accessed September 14, 2006).

Turabian, Kate L. *A Manual for Writers of Research Papers, Theses, and Dissertations,* 7th ed., Chicago: The University of Chicago Press, 2007, 466 p.

Villers, Marie-Éva de. *Multidictionnaire de la langue française*. 5th ed., Montréal: Québec Amérique, 2009, 1707 p.