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Most important thing to keep in mind: consistency, logic, and ease of reading for our readers.

Note: the abbreviation CMS in text refers to the Chicago Manual of Style.
Part I: Punctuation Guide

BRACKETS AND PARENTHESES
Brackets are commonly misused in place of parentheses. It may be helpful to keep in mind that in general, the main function of brackets is to enclose inserted material in a quotation that the original writer could not have supplied.

Examples: “These companies [the aforementioned ones] are expecting a record-breaking year.”
“Many MS [multiple sclerosis] patients are seeking alternative therapy.”
“Columbus discovered the New World on October 11 [12].”
[The spokesperson did not reply to us by the time we went to press.—Ed]

Parentheses are generally used to enclose clarifying material. Many times commas and dashes can be used in place of the parentheses, but it is preferable to use parentheses when enclosing matter that has no essential connection with the rest of the sentence in which it occurs.

Examples: The new insurance rates will be published in the company’s annual report (coming out next year).
Ten percent of the shareholders are in favor of the proposal (New York Times).
Dostoevsky (some sources spell his name Dostoevski) wrote his first book in 1846.

Within parentheses: brackets are used to enclose parenthetical matter within parenthetical matter.

Examples: Dostoevsky (some sources spell his name Dostoevski; see Abrams [2003] and Sanchez [2006]) wrote his first book in 1846.
All abbreviations using capital letters are spelled without periods except U.S. and the first and middle initials of persons (e.g., W. E. B. Du Bois [note, too, the space between each initial]).

THE COLON
Colons are mainly used to 1) introduce a formal statement or 2) introduce a series (or run-in list).

Examples: Of life two things are true: “The unexamined life is not worth living” and “The unlived life is not with examining.”

We have covered the following companies in CaseWorks: Foamex, Target Corp., Costco, and Cablevision.

Note that there should be only one space after the colon.

Inappropriate uses of the colon:
After “namely”:
Right: The professor specializes in three fields, namely, business ethics, management, and marketing.
Wrong: The professor specializes in three fields, namely: business ethics, management, and marketing

Preceding a series introduced by a verb or a preposition:
Right: The professor’s specializations include business ethics, management, and marketing.

or

The professor is mostly concerned with business ethics, management, and marketing.

Wrong: The professor’s specializations include: business ethics, management, and marketing.

or

The professor is mostly concerned with: business ethics, management, and marketing

If the elements introduced by a colon consist of more than one sentence or if it is a formal statement or a quotation, it should begin with a capital letter; otherwise it should be lowercased.

THE COMMA

Per CMS: “The comma, aside from its technical uses in mathematical, bibliographical, and other contexts, indicates the smallest break in sentence structure. It denotes a slight pause. Effective use of the comma involves good judgment, with ease of reading the end in view.”

Addresses and Names

Commas are also used to set off elements in an address.

Examples: Her home is now in Peabody, Massachusetts, but she was born here.

The reception was held in Washington, DC.

He stopped off briefly in Turin, Italy, before returning to Beirut.

Insert a comma to set off a place of residence immediately following a person’s name unless the place is essential to the meaning of the sentence.

Examples: We elected Howard Cagney, of Bronx, New York, as our chapter president.

but

The Cagneys of Bronx, New York, are unrelated to the Cagneys of Queens, New York.

Dates

Use a comma in the month-day-year style (the most common style in the United States).

Examples: The company was founded on April 3, 2005, by a small group of investors.

The professor referred to the September 1, 2008, CaseWork [Note: Some might find this awkward. An alternative could be “The professor referred to the CaseWork of September, 1, 2008.”]

Note: do not use the “th” following the date (May 1, 2008, not May 1st, 2008).

Independent Clauses

Conjunction between clauses: When independent clauses (a sentence in which two or more verbs share different subjects) are joined by conjunctions such as “and,” “but,” and “or,” a comma usually precedes the conjunction unless the clauses are very short and closely connected.
Example: Applications for admission to Columbia Business School have increased by 75%, and each year members of the incoming class are of higher caliber. [Note: this is an example of an independent clause—what follows the comma takes its own subject and verb and can stand on its own as a separate sentence.]

The following is an example in which a comma may be omitted because the clauses are short and closely related:
Example: She spoke but he didn’t.

A common error is inserting a comma before an adverbial phrase.
Example: Wrong: He had come alone to the party, and, as he made his way through the crowd, he saw no one he knew.
Right: He had come alone to the party, and as he made his way through the crowd, he saw no one he knew.

**Compound Predicate:** A comma is not normally used in a compound predicate (a sentence in which two or more verbs share the same subject). An exception to this is when a sentence is very long and a comma could help to indicate a pause or to prevent misreading.
Examples: CaseWorks began in 2007 and has thrived since then. [Note: the two verbs in this sentence—“began” and “thrived” share the same subject—CaseWorks, so no comma is needed before the conjunction “and.”]

Professor Jones wrote the case but was not involved in the editing.

but
She recognized the woman who entered the room, and gasped. [Note: the person who is gasping is the woman who recognizes, not the woman who enters the room.]

Target Corp. has made large investments in distribution center capacity to support new stores and handle increases in carton volume, and plans to open four new distribution centers and two import warehouses in 2009. [Note: The comma here indicates a pause, although some editors might not insert one. There is no wrong or right here but differing editorial judgments.]

In the following example, it is best to observe the rule of not breaking a compound predicate, even if there might be a natural pause before the conjunction if the sentence were read aloud. Per *Words Into Type*, “In following rules for punctuation the written word always takes precedence over the oral word.”
Example: He grabbed the teapot and, after removing its lid, served his mother.

**Introductory Word and Phrases**
Set off long introductory phrases or dependent clauses with a comma, especially if a slight pause is intended.
Examples: Because of traffic delays, she was late for the meeting.
While he was home, he made all the telephone calls on his list.

*but*
After eating she took a nap. [Unless it could be misread—e.g., After eating, the family took a nap.]

**Parenthetical Phrase**
No punctuation—including a comma—ever precedes a parenthetical phrase. Following the parenthetical phrase, use whatever punctuation would have been appropriate if the phrase were removed.
Example: The stockholders voted for the proposal (although there was one vote against it), and the proposal passed.

**Restrictive/Nonrestrictive Clauses or Phrases**
Commas are also used to set off nonrestrictive clauses or phrases. A nonrestrictive clause is one that if it were omitted, the meaning of the sentence would not be changed. The relative pronouns “which” and “that” (see examples below) should generally be used to introduce nonrestrictive and restrictive clauses, respectively, when the choice is between the two.
Examples: 
*Nonrestrictive*: These books, which are placed on reserve in the library, are required for the course.
*Restrictive*: The books that are required for the course are in the library.

*Nonrestrictive*: My professor, Dirk Jones, teaches the course (I have only one professor).
*Restrictive*: My professor Shania Chan teaches the course (I have more than one professor).

**Serial Comma**
Use a comma before the final “and” or “or” in a series.
Examples: She has four books, three pencils, two pens, and one eraser.

Do you have any doubts about the case, hesitations about its outcome, and questions about its procedures? 

but

Is it by Professor Jones or Smith or Lee? [*Note*: The serial comma is not needed here because all the elements in this series are joined by a conjunction. If the elements are long, however, a serial comma could come in handy for ease of reading.]

Note that the insertion (or not) of a serial comma can change the sentence’s meaning.
Examples: “Anna, Wojin and Mary are here” [telling Anna that Wojin and Mary have arrived].

“Anna, Wojin, and Mary are here” [all three have arrived].

**Dashes vs. Hyphens**
There are two kinds of dashes: the em dash and the en dash, and each has its specific uses. The hyphen is mainly used to 1) separate numbers both inclusive (e.g., $13 billion-$21 billion; 2000-2008) and noninclusive (e.g., telephone numbers); 2) join words to form compound words; and 3) form end-of-line word breaks.
Note that the em dash, the en dash, and the hyphen must be distinctly typeset:

Em dash: —
En dash: –
Hyphen: -

**Em dash:** the em dash has several uses, including
1) to amplify or explain
2) to avoid confusion
3) when the words enclosed are to be read parenthetically
4) to indicate a sudden break

Examples: The director described the qualities—experience, intelligence, and initiative—that she most desires in a candidate.

The costs—deductibles and copayments—will increase next year.

Some students thought—and still think—that tuition will not increase.

Will he—can he—attend in light of this latest development?

**En dash:** CaseWorks uses en dashes only in compound adjectives in place of a hyphen when one of the elements of the adjective is an open compound (such as New York) or when two or more of the elements are hyphenated compounds (e.g., New York–London flight, post–Civil War period, quasi-public–quasi-judicial body, Nobel Prize–winning).

**QUOTATION MARKS**
Use double quotation marks for quoted words, phrases, and sentences run into the text. Use single quotation marks to enclose quotes within quotes.

Examples: Analyst John Mally said, “Next year will be a pivotal one for the market.”
“Is it too much to ask,” he bellowed, “that my steak be medium rare?”
He was stunned when the attorney turned to him and asked, “What ‘contract of agreement’ are you referring to?”
He had the nerve to say, “That is not my problem”!
“I quit!” she exclaimed.
Do you think she meant it when she said, “I’m quitting”? 

Note that periods and commas always go inside the closing quotation marks, regardless of grammatical logic. Exclamation points and question marks precede the closing quotation mark if they are a part of the quotation; otherwise, they fall outside of the quotation mark.
THE SEMICOLON
Semicolons mainly serve two functions: 1) separate elements of a series where one or more elements have internal punctuation or 2) separate two parts of an independent clause that is not joined by a conjunction.
Examples: I have lived in the Bronx, New York; Philadelphia, Pennsylvania; and Poland, Ohio.

The staff set up a temporary infirmary in the hotel; hundreds were cared for in the huge ballroom. [Note: this is an example of an independent clause—i.e., both parts of the sentence preceding and following the semicolon can stand on its own. Some editors might use a period instead of a semicolon in this instance.]

Semicolons can also be used to separate items in a series if they are very long and complex.

Part II: Style Guide

ACRONYMS: BUSINESS

Titles
Is it CEO or chief executive officer? Vice president or VP? CMS does not provide an answer to this. Words Into Type says, “Titles denoting position or rank should usually be spelled out in general text. Occasionally abbreviations may be appropriate.” Keeping in mind CaseWorks’ audience and for ease of reading, the following titles are abbreviated regardless if they precede or follow a person’s name: CEO, CFO, COO, CIO, VP, and SVP.

Note: all acronyms using capital letters are spelled without periods except U.S. and the first and middle initials of persons (e.g., W. E. B. Du Bois [note, too, the space between each initial]).

Company Names
CMS lists the following commonly used generic abbreviations:
Assoc.
Bros.
Co.
Corp.
Inc.
LP (limited partnership)
Ltd.
Mfg.
PLC (public limited company)
RR (railroad)

In running text, company names are best given in their full forms, though Inc. and PLC may be omitted unless relevant to the context.
Examples: The Rand Corporation is a nonprofit organization. Brooks Brothers has many locations.
Abbreviations and ampersands are appropriate in notes, bibliographies, and the like.
Examples: Rand Corp.
          Target Corp.

**Acronyms, General**
Acronyms that are not commonly known should be defined on their first occurrence, followed by
the acronym in parentheses.
Example: The concept is known as square root 5 (sr5).

*Note:* unless the word is a proper noun, the acronym is lowercased.

**ARTICLES**
The indefinite article “a” is used before a pronounced “h” and a long “u” or “eu.”
Examples: a hotel but an honor
          a union
          an heir
          a euphemism
          an undertaker

**CAPITALIZATION**
Professional, religious, civil, and military titles are capitalized when they immediately precede a
personal name as part of the name, usually replacing the person’s first name.
Examples: President Bollinger
          Professor Hubbard

But they are lowercased when they follow the name or are used in place of a name.
Examples: John Jones, treasurer
          The president’s office
          She’s the dean of our school

*Exceptions:* in a running list (such as a board of trustees list where company titles and company
names are given) or for promotional or other purposes.

*Note:* CaseWorks deviates from **CMS** in that CaseWorks capitalizes titles that are used in
apposition to the name and are therefore not part of the name.
Examples: Columbia University President Lee Bollinger [*Note: CMS would
          lowercase “President.”*]
          He then introduced Chief Operating Officer Melika Hoody. [*Note: CMS
          would lowercase “Chief Operating Officer.”*]
Academic
Named professorships are capitalized wherever they appear. University Professor is always capitalized.
Examples: Linda Green is the Armand G. Erpf Professor of the Modern Corporation.
Morris and Alma Schapiro Professor of History Caroline Walker Bynum has been named University Professor, Columbia’s highest faculty honor.

For named academic awards and honors, capitalize the full proper name.
Examples: Nobel Prize, Guggenheim Fellowship, but National Merit scholarship

Formal names of an institution’s departments or divisions are capitalized; informal references are lowercased (the Office of Financial Aid, but the financial aid office).

Institutions and Companies
Formal names of institutions and companies, their departments, and sometimes their short forms are capitalized (the General Foods Corporation; General Foods; the corporation). Generic terms such as company and school are usually lowercased.

Lowercase “The” in the names of organizations, companies, buildings, schools, etc., in running text (note: it’s the Netherlands but The Hague). Also, lowercase and romanize “The” in newspaper and periodical titles in running text (the New York Times and the American Historical Review).

Misc.
In general, capitalize geographical regions but not points of the compass (Middle East, but he faced east).

Lowercase the word “Magazine” when it appears after the proper name unless it’s part of the proper name (New York magazine, but Harper’s Magazine).

DEGREES
CaseWorks abbreviates degrees and does not use periods.
Examples: MBA, BA, PhD

FORMATTING AND FONTS
To Emphasis Words, to Highlight Terms, and for Words and Letters Used as Words
Use italics for all of the above. Note, however, that italics for emphasis should be employed as sparingly as possible. If you find a case that does this often, it can be a sign of weak copy. If the copy is strong enough to stand on its own and get its point across, then there should be no need to italicize excessively.

Per CMS, “Overused, italics quickly lose their force. Seldom should as much as a sentence be italicized for emphasis and never a whole passage.”
When highlighting a key term, italicize on its first occurrence and romanize thereafter.

Do not use all caps to emphasize, highlight, etc.

For Foreign Words
Use italics. However, if the word is in Merriam-Webster’s, then it is considered to be familiar enough that it does not need to be italicized.

To Label Tables, Charts, Exhibits, Etc.
The header for each of the above should be set in boldface and headline style.
Examples: Table 1: Largest Pay-TV Providers
           Chart 4: Debt and Equity Capitalization per Subscriber
           Exhibit 3: Vote on Board Members

Note in the examples above that a colon separates the number of the table, chart, and exhibit from the title.

To Label Sources
Use boldface.
Examples: Source: Miller Buckfire.
          Sources: Miller Buckfire, IBM Corporation, and Edgarscan.

Note in the above examples the terminal period.

HYPHENATION
For a fairly thorough guide to spelling compound words and words with prefixes and suffixes, see CMS pages 302-8. Per CMS: “The guide illustrates not hard and fast rules but general patterns. Writers and editors are bound to make their own exceptions according to context or personal taste.”

The last sentence above is especially noteworthy because sometimes a word does not appear in either CMS or Merriam-Webster’s (MW). And sometimes, a reference source can contain what appears to be conflicting styles: e.g., CMS lists decision making as two words but policymaking as one; MW does not have an entry for either word. The important thing to keep in mind is consistency. With this in mind, CaseWorks uses decision making (noun), decision-making (adj.) and policy making (noun), policy-making (adj.). CaseWorks also uses decisionmaker and policymaker.

Two or more hyphenated modifiers having a common base are treated as follows:
Examples: small- and middle-market firms
          2-, 3-, and 10-minute trials
          9- to 12-year-old girls

Adverbs of the “-ly” variety are never hyphenated.
Example: She was a highly paid professional.
Hyphens in Numbers

The hyphen goes between two parts of a fraction (e.g., one-half) and between numbers in measurements before a modified noun (e.g., four-and-a-half-month period) but not when standing alone (four and a half months or four and one-half months).

A hyphen is also used with both inclusive (pages 445-456) and noninclusive (212-998-1234) numbers.

When inclusive numbers are joined by a hyphen, they must not be preceded by a preposition.
Examples:  
Right: 167-72  
Wrong: from 167-72

Right: from 1998 to 2004  
Wrong: from 1998-2004  
or
Right: between 1998 and 2004

In the simple adjective form, do not use a hyphen: e.g., a $2.5 million investment. But hyphens must be used in longer modifiers: e.g., a $2-million-a-year job.

Abbreviations with inclusive numbers, primarily for page numbers in footnotes: Less than 100—use all digits (34-67). 100 or multiple of 100—use all digits (100-104, 600-613). 101 though 109—use changed part only, omitting unneeded zeroes (107-8, 3002-9). 110 through 199 (in multiples of 100)—use two digits, or more if needed (321-25, 415-567, 1496-504).

LISTS

Omit closing punctuation after items in a vertical list unless one or more items are complete sentences. If the vertical list completes a sentence begun in an introductory element, the final period is also omitted unless the items are separated by commas or semicolons.

Examples:

The following metals were excluded from the regulation:
• molybdenum
• mercury
• manganese

After careful consideration, the committee was convinced that
• Watson had consulted no one before making the decision,
• Braum had never heard of Watson, and
• Braum was as surprised as anyone.

Note that in the first example, a colon introduces the list. It is a complete sentence on its own. In the second example, the elements of the list complete the sentence (“…the committee was
convincing that...”), and there is no punctuation separating the introductory element from the list (but there is punctuation after each item in the list itself).

**NUMBERS, DATES, AND TIME**

**Numbers**
Spell out numbers nine and under. Use figures for numbers 10 and above, including, e.g., 21st century. [*Note: “st” sits on the line and is not a superscript.*]

Spell out any number that begins a sentence.

Percentages are always expressed in figures (and the word percent is denoted by its symbol): 43%, 8% *but* Ten percent of the class did not show up [see rule above].

212-989-3456 is the preferred form of telephone numbers.

$3 million; $3 million to $6 million (not $3 to $6 million)

**Dates**
In full-date citations that include the day, the year must be enclosed by commas: e.g., On January 15, 1975, he left home for the first time. But without the day, no commas are used: e.g., He first served on a jury in March 1996 and found it challenging.


The 1990s; the ‘90s *but* She was in her 90s.

**Times**
Use numerals for all times.

At the top of the hour, do not add the colon and minutes (10 a.m., *not* 10:00 a.m. *but* 9:20 a.m., 11:30 p.m. flight).

Use “noon” and “midnight,” *not* 12 p.m. or 12 a.m.

**PLURAL FORMS**
**Proper names form the plural by adding “s” and “es.”**
Examples: There are five Toms in the class.
The Joneses just arrived.

**Single or multiple letters used as words, hyphenated coinages used as nouns, and numbers (spelled out or in figures) form the plural by adding “s” alone.**
Examples: three Rs
thank-yous
the 1990s
the SATs
in twos and threes
IBM PCs

Lowercase letters used as nouns and capital letters that would be confusing if “s” alone were used
to form the plural by adding an apostrophe and an “s.”
Examples:  x’s and y’s
          A’s (grades)
          SOS’s

**POSSESSIVES**

General rule: singular common nouns form the possessive by the addition of an apostrophe and an
“s”; plural nouns form the possessive by the addition of an apostrophe only (for exceptions, see
below and CMS, page 282ff).
Examples: the horse’s hay
          the horses’ hay
          a bass’s stripes
          the puppies’ paws
          the people’s choice

Most proper nouns follow the same rule, including those ending in the sound of “s,” “x,” or “z.”
Examples: Burns’s poems
          the Burnses’ home
          Gus’s place
          Marx’s theories
          Inez’s pants

The exceptions by tradition are Jesus, Moses, and Greek (or hellenized) names of more than one
syllable ending in “-es”:
Examples: Jesus’ ministry
          Moses’ robes
          Achilles’ heel

However, CMS (15th edition) has given its stamp of approval to “Jesus’s contemporaries” (but
maintains that “for Jesus’ sake” is correct). In instances such as these, and to avoid the appearance
of inconsistency, try to change the sentence around so that it reads, for example, “the
contemporaries of Jesus” or “the ministry of Jesus.”

**Other Exceptions**

A few common nouns, for euphony, make a possessive with only the apostrophe:
Examples: for old times’ sake
          for appearance’ sake
          for goodness’ sake
Nouns plural in form but singular in meaning:
Example: the United States’ trade agreement

Words ending in an unpronounced “s”; do this only if you are certain that the “s” is unpronounced.
Examples: Descartes’ inventions
Arkansas’ population

**SPELLING**

For words with variant spellings, use the first-listed form (e.g., canceled, rather than cancelled; toward, rather than the British variant towards). American spelling always takes precedent over spelling used in other English-speaking countries except in cases of proper nouns and quoted materials.

**TECHNO TERMS**
CD
CD-ROM
database
DVD
e-business
e-mail (verb, noun, and adjective)
fax (lowercase is correct; the word is not an acronym)
hard copy
home page
HTML
information highway
Internet
online (adjective and adverb)
URL
webmaster
Web page
Web site
word processing (noun)
World Wide Web, the Web, WWW

**TITLE PAGE, CASEWORKS**
The title page consists of the following elements:
• Columbia Business School tag and logo
• Columbia CaseWorks tag
• ID number and publication date
• Title and authors(s)
• Abstract
• Contents

On the bottom of the page are three sections (all in italics, and in boldface where specified):
1) Footnotes that contain information about the author(s), mainly a professor’s title at Columbia Business School, and sometimes, an author’s year of graduation and degree (e.g., MBA ’07). This information is in boldface.

2) Acknowledgements
Example: The author gratefully acknowledge the support and assistance of the Target Corporation; Jack Howard of Steel Partners; and Kelly Davis, MBA ’08.

If a person being acknowledged is not currently affiliated with any company, use his or her most recent title.
Example: The author gratefully acknowledges the support and assistance of the Target Corporation; Jack Howard of Steel Partners; Raymond Mabus, former CEO and chair of Foamex Corporation; and Kelly Davis, MBA ’08.

The only boldface in this section is the title “Acknowledgements.” Note, too, that the beginning of this section (“The author gratefully acknowledges the support and assistance of...”) should be used for all CaseWorks.

3) Copyright information (boilerplate). The only boldface in this section is the title “Copyright.”

TITLES OF WORKS
Titles of books, periodicals, journals, newspapers, pamphlets, movies, and television and radio programs are italicized. “The,” even if it’s part of the official title of a newspaper or periodical, is lowercased (unless it begins a sentence) and not italicized.
Examples: Professor Baker was quoted in the New York Times.
but
In The 4-Hour Workweek, Timothy Ferriss....

“A,” “an,” and “the” may be dropped if it is works syntactically.
Example: Ferriss’s 4-Hour Workweek explains....

“Magazine” is lowercased and romanized unless it belongs to the official title.
Examples: It says so in New York magazine.
It says so in the New York Times Magazine.

Titles of newspaper, periodical, and journal articles; chapter and part titles; short stories or essays; and individual sections in books are romanized and enclosed in quotation marks.
Examples: Did you read “Bernanke Warns of Threat to Economy” in today’s New York Times?
The first chapter of the book is “To Sell or Not to Sell.”
Online works are treated the same way as above.
Examples:
For more information, go to “Faculty and Staff” on our Web site.
An excerpt from Professor Feiner’s book How to Conquer the Stock Market can be found on our Web site.

TRICKY WORDS
Arthur Andersen
best-seller
brand-new (adjective)
buyout (noun); buy-out (verb)
caregiver
child care
class A shares; class B shares
coauthors
cochairman (or cochairs)
creditworthy
day care (noun & adj.)
decisionmaker
decision-making (adj.)
decision making (noun)
dos and don’ts
fast-track (adj.)
fast track (noun)
first-class (adj., adv.)
first class (noun)
first-come, first-served [basis]
firsthand, secondhand
first-quarter earnings
forgo (to do without); forego (to precede)
form 10-K; 10-K
head start
health care (both noun and adjective)
lawmakers
long-distance
long-term
mentee
off-limits
old-fashioned
ongoing
on-site
policymaker
policy-making (adj.)
policy making (noun)
price-to-earnings ratio
PricewaterhouseCoopers
problem solving (noun)
problem-solving (adj.)
real-world, real-life, real-time (adj.)
reengineer
reestablished
time-consuming
timescale
trade-off (noun)
trade off (verb)
tristate
UK, U.S., UN
voice mail (n.); voice-mail (adj.)
well-being
well-defined
well-known
well-worn
year-over-year (adj.); year over year (adv.)
year-round, yearlong

Other Tricky Words/Usage

• Adviser vs. advisor: the preferred spelling, per *Merriam Webster’s*, is “adviser.” However, since “advisor” is a very common spelling in business, it is okay as long as it is consistent.

• Brand-name (adj.), brand name (n.) vs. name-brand, name brand: use brand name with or without the hyphen, depending on the text.

• Chair, chairman, chairwoman, chairperson: change to “chair.”

• Comprise vs. compose: the former means to be made up of; to include. The latter means to make up, to form the substance of something. “Comprised of” is poor usage. Use “composed of” or “consisting of” instead.

• Due to vs. because of: “due to” is synonymous with “attributable to,” not “because of,” for which it is often mistaken.
Examples: The accident was due to bad weather.
          but
          He lost his way because of carelessness.

• Due to the fact that...use “because” instead.

• Farther vs. further: the first denotes actual physical distance; the second, figurative distance. So it’s We drover farther up the road but Let’s examine this further.

• Feel bad vs. feel badly: you might feel bad if someone suffered a loss, but you’ll feel badly (i.e., not being able to touch or feel too well) if you have arthritis.
• More/most important vs. more/most importantly: use “important” in all instances. But alone, with no modifier, use the adverb.
Examples: Most important, our students have the opportunity to study with stellar faculty.

Importantly, he came to agree with them.

• On vs. upon: CMS prefers “on” unless introducing an event or condition: Lay one on me but Upon finding out about the company’s loss, the CEO skipped town. Merriam-Webster’s disagrees and would use “on” in the second example above. Whichever is used, be consistent.

• premier
adj.: first in position, rank, or importance; earliest (in time)
noun: prime minister

premiere
noun: first performance or exhibit
verb: to give a first public performance

• The fact that: change to “that” if possible.

• “Under way” is two words, no hyphen, as an adverb, which it almost always is.
Examples: The building construction was already under way when the financing was finalized.

but
She called his attention to the underway replenishment of supplies [here underway is an adjective].

PART III: FOOTNOTES
The most frequent footnote citations in CaseWorks are book; periodicals (CMS defines periodicals as scholarly and professional journals, popular magazines, and newspapers); electronic (online) materials; and interviews.

Note: If the footnote style of a case does not match the style below but is consistent throughout the case, please consult with the CaseWorks team before making any changes. There may be instances where the time and effort required to conform to the format below would be too great. Exceptions will be made on a case-by-case basis. When in doubt, query.

See also Hyphens in Numbers (under Hyphenation, above).

Books
One author
Example: 1Ernest Hemingway, Farewell to Arms (New York: Simon & Schuster, 1929).

Two authors

**Three authors**
Same as above. The authors (or editors) are listed in the order on the title page. Insert a comma after the second author, followed by the conjunction “and.”

**Four authors or more**
Same as above except only the name of the first author is included, followed by “and others.”

*Note:* in the example above, a page number is provided to reference a particular passage in the book.

**Citing Chapters of a Book**

In lieu of the chapter title, you can also cite the chapter number instead (but not both).

**Editor or Translator in Addition to Author**

If you are including an editor, follow the same format as above, except “trans.” is replaced by “ed.”
If a person is both a translator and an editor of the book, use “trans. and ed.”

*Note:* Abbreviations such as “The,” “Inc.,” “Ltd.,” “Co.,” “& Co.,” and the like are okay to omit from a publisher’s name. Use either ampersand or “and” in a publisher’s name—just be consistent (e.g., Harper & Row vs. Harper and Row).

**Periodicals**
*CMS* defines periodicals as scholarly and professional journals, popular magazines, and newspapers, whether printed or online. The only difference between an online periodical citation versus a published one is the addition of a URL for the online version.

**Journals**

*Note* for the above that
• title of journal article is enclosed by quotation marks and capitalized headline style
• title of journal itself is in italics
• the volume number follows the journal title without any intervening punctuation. Use Arabic numerals even if the journal uses Roman numerals
• the issue number, when provided, follows the volume number and is preceded by “no.”
• the date can be an exact date, month/year, or season/year—whatever the journal itself provides
• if no volume number was provided, then it would be “...Organization Science, no. 1....”

If a journal has more than four authors, refer to the “Books” section above.

Electronic journals: the style would be same as for the printed journal above, except that you would insert a comma (instead of a period) after the page number and insert the URL.

Magazines
8The Talk of the Town, New Yorker, April 10, 2003, 31.
25Jose Wilson, Your Money, Newsweek, August 2004.

Note for the above that
• the last two footnotes refer to titles of regular departments in the respective magazines
• no volume and issue numbers are necessary; use date only
• inclusive page numbers can be omitted since they are often separated by extraneous materials.
Specific page numbers are optional—just be consistent.
• title of the article is capitalized headline style
• an initial “The” is omitted from a magazine’s name

Online magazines: Same style as above for printed magazines, except that you would insert a comma (instead of a period) after the date or page number and insert the URL. If the material is especially time-sensitive, include the date the material was last accessed.
Example: 25Jose Wilson, Your Money, Newsweek, August 2004,

Newspapers

Note for the above that
• title of the article is capitalized headline style
• last footnote refers to a regular column in the paper. If space is an issue, can just cite the name of the column (Life/Travel) and omit the name of the article (“Hands-on Discipline”).
• an initial “The” is omitted from a newspaper’s name
CMS stresses the importance of providing the month, date, and year for newspaper citations and also to indicate the paper’s edition (e.g., Midwest edition) when possible. Page numbers are best omitted, although the section number or name (if applicable) may be provided.

News Services: such as AP or Reuters.

Online newspapers, news services, and other news sites: same as for the examples above, with the addition of a URL and, if the item is time-sensitive, the date of access.

Electronic (Online) Materials
See specific examples above on how to cite online publications. Include as much information as possible for the readers. Anything is better than just citing a URL, which can change, become obsolete, etc.

If possible, include the following information from online sources other than those listed above:
• author of the content
• title of the page
• title or owner of the site (if a site has no author per se, cite the owner instead)
• URL
• date the material was last accessed, if the material is especially time-sensitive


If the above citation did not have an author, then it would be

Interviews
Example (Unpublished Interviews):
7Ken Buckfire (principal, Miller Buckfire), in discussion with the author, February 13, 2007.

Example (Published or Broadcast Interviews):

Example (Unattributed Interviews):
7Interview with a brokerage firm employee, May 3, 1988.

Note: Per CMS, unattributed interviews can be cited in whatever form deemed appropriate. They should, however, explain why a source’s name is not included (e.g., “The source agreed to speak with us only if we did not identify him.”).
Part IV: GENERAL EDITING NOTES
It is a good idea when editing a new job and making the corrections to the file to first do a find-and-
replace with extra spaces. Per CMS, there should be only one space between sentences. The same
applies to a colon: there should be one space after a colon (see above for when to use colons). The
“one space” rule applies generally.

CaseWorks is generally presented in the present tense. There may be exceptions; query if necessary.

After the full initial introduction, use the person’s last name in future occurrences.
Example: CEO Bob Ulrich (1st occurrence)
CEO Ulrich or Ulrich (for the rest of the text)

Note: Not Mr. Ulrich (or, e.g., Ms. Smith). If a person was last mentioned on page 3 and the next
occurrence is five or more pages later, it could be a good idea to repeat the full name to remind the
readers.

A common error is using the wrong pronoun when modifying a subject.
Example: Wrong: The family withdrew their proposal.
Right: The family withdrew its proposal.

Another common error is to use, e.g., $10 million dollars. It should be $10 million.

Quotations should have citations (list sources), unless the quotations are well-known axioms.

For exhibits, charts, tables, etc., make sure that any years mentioned in the header match the years
actually represented in the exhibits, etc. Query any discrepancies.

Try to always run spell check after you have input your corrections. This way, you might catch not
only the author’s errors but your own as well.