

## INCORPORATING VISUALS IN APA DOCUMENTS

For business reports, visuals may (or may not) have to follow any of the academic guidelines such as Chicago, MLA, or APA. Your first job when using visuals in reports is to determine the expectations of your organization and audience.

If you determine that using APA style is appropriate, the following information distilled from the APA manual should help. If your document situation is more complex than illustrated here, please refer to the APA manual, Section 3 APA Editorial Style, Subsections Tables (p. 147) and Figures (p. 176).

Understanding how to apply APA guidelines begins with terminology. A report might have many types of visuals, but they are classified by APA as one of three, (a) tables, (b) figures, or (c) equations. Tables might consist of numbers or words. Figures might be bar charts, pie charts, scatter plots, drawings, or photos. Equations may be simple and fit right into your text, or they might be complex and large enough to be "displayed" and numbered as are tables and figures. If you are using equations, see the APA manual for detailed instructions. Table and figure visuals are illustrated here.

### The Basic Elements for Visuals

Table and figure visuals include the following five elements in this order:

1. Introduction of the visual in the text including reference to the visual by caption (i.e. Table 2 or Figure 4)
2. The visual's caption: Table # or Figure #
3. The visual's title (italics for tables, not italics for figures; upper and lower case lettering)
4. The visual
5. *Note* (italicized and followed by a period) follows the table or follows the figure caption and title and may be "general notes, specific notes, and probability notes" (3.70, p. 170). For reports displaying data from resources, the notes should explain where the data was obtained. Notes also serve as a place to include a copyright notice for original work.

### Special Features of Tables

Tables follow these formatting rules:

- Caption placement: top of table
- Table caption (number) first line, normal font
- Table title in normal italics font on second line
- Headers and sub-headers as appropriate
- Data presented in columns and rows
- Use of horizontal lines at the top, bottom, and dividing sections, but no vertical lines and no colors or shading
- *Note* (in italics and followed by a period) follows the table to provide source information

### Special Features of Figures

Figures follow these formatting rules:

- Caption placement: bottom of figure
- Figure caption (number) and title (not italics) are on the same line
- *Note* (in italics and followed by a period) follows the figure caption and title to provide source information

### About Font Format

APA style is meant for creating manuscripts being sent to journals for publication, not final-copy documents. APA does not use bulleted lists, color, or bold. However in business and technical documents, these three formatting choices may be appropriate. Such decisions must be made for each document situation rather than slavishly following rules meant for different situations. Analyze your document situation before making format decisions.

## Example of APA Table

Start with the idea that the report narrative makes a point that the data in the table supports. The narrative highlights important data, but the narrative does not relate all the data in the table or one would not need the table (3.63, p. 154). A table presents more data than is in the narrative as well as displays the relationships among the data. A table must be referenced in narrative and displayed, if possible, on the same page as the first mention of the table.

Notice the following facts in the table example:

- Five elements
- Lines and absence of lines (vertical top & bottom of header row and at the bottom of the table)
- Absence of color and shading

Many students do not correctly follow all the APA rules on their first try, as shown in Table 4, so they need practice.

Table 4

*Rodgers' Estimate of Students Following APA  
Formatting Rules*

Practice Tries	APA Correct	APA Incorrect	Total Students
1st Try	5	95	100
2ndTry	50	50	100
3rd Try	95	5	100

*Note.* From "How to Incorporate Visuals" by I.L.  
Rodgers, p. 2.

Element 1. Introduction of table in text uses the table's caption

Element 2. Table caption with number on first line

Element 3. Table title (italicized) on second line

Element 4. Table with horizontal lines, no vertical lines and no colors or shading

Element 5. *Note* (italicized) follows table with citation information. After the word, *Note*, use a period.

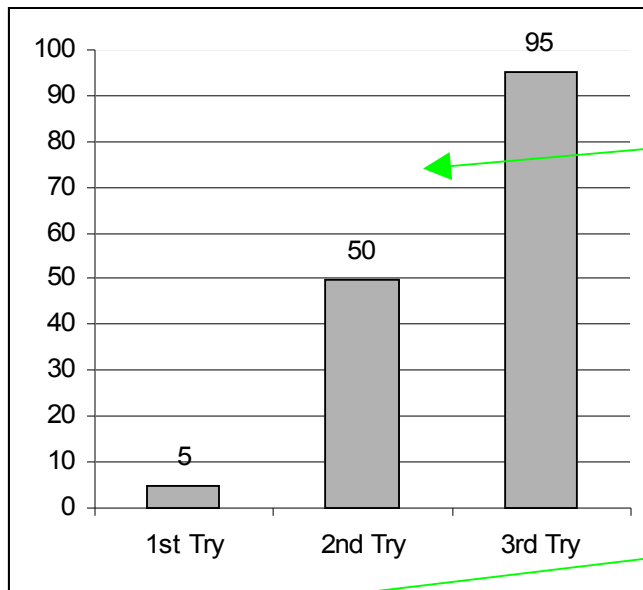
## Example of APA Figure

Start with the idea that the report narrative makes a point that a graph illustrates. The graph does not *necessarily* represent all the data one would find in a table (an entire data set), but it represents data that makes a point, tells a story, conveys a message, hits a highlight, or however one wants to phrase the idea that a figure has a narrower focus compared to data in a table.

Notice the following facts in the figure example:

- Five elements
- A specific message
- Absence of color (depending on the document situation)

Many students do not correctly follow all the APA rules on their first try, as shown in Table 4, so they need practice. However, with practice most students succeed as illustrated in Figure 2.



Element #1. The figure is mentioned in the narrative preceding the figure.

Element #2. The figure without a built in caption or title but with, if appropriate, a legend.

Element #3. Figure caption with number follows figure

Element #4. Figure title begins on same line as figure caption.

Element #5. *Note* (italicized) follows figure caption and title with citation information. After the word, *Note*, use a period.

Figure 14. Students Succeed Using APA over Time.

*Note.* From data in "How to Incorporate Visuals" by Ida L. Rodgers, p. 2.

## Reference

American Psychological Association (2001). *Publication manual of the American Psychological Association* (5th ed.). Washington DC: Author.



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