

APA Bib^LA_EX style

Citation and References macros for Bib^LA_EX

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1 Important Changes

Please see the revision history below (section 5) for details on changes in each version. This section is just for important things like incompatible changes which users should be aware of.

9.0

Completely overhauled for APA 7th edition. APA 7th edition is a lot more consistent in terms of its formatting blocks and elements, resulting in much less dependence on ad-hoc entry types and fields. In general, your .bib should be updated in accordance with this documentation for APA 7th edition compatibility.

biber 2.14+ and biblatex 3.14 + are required.

One effect of the normalisation of reference entries in the 7th edition is that standard entrytypes can be used to cover many more cases. Indeed, the set of standard entrytypes required is also smaller, for example, @COLLECTION and @INCOLLECTION are not required at all (and are internally remapped to @BOOK and @INBOOK respectively). Differentiation between different entry subtypes (for example, songs, albums or podcasts within the AUDIO entry type) is handled by localised strings held in the ENTRYSUBTYPE field. As a result, many more localisation strings have been added to the .lbx files. Please let me know if you are able to translation the new strings in the .lbx file for your language, they are generally marked with "%FIXME".

2 Introduction

2.1 About

This package is a Bib^LA_TE_X style for APA (American Psychological Association) 7th Edition style compliant documents typeset in LaTe_X. It implements a citation style (`apa.cbx`), a references section style (`apa.bbx`), some data model enhancements (`apa.dbx`) and string localisation files (`<language>-apa.lbx`). The style is loaded just like any other Bib^LA_TE_X styles but don't try to use the citation and references styles separately as they rely on each other, macro-wise, in places.

Please see the package `biblatex-apa6` on CTAN for the APA 6th edition conformant version of this style.

In general, there is no attempt to generalise this style for non-APA requirements—it is written for APA compliance only. Having said that, there are a few options which allow users to change the APA defaults.

In this document and in the code, the specific APA requirements are referred to by the section and (if appropriate) the example number of the APA Style Guide (7th Edition).

2.2 Requirements

You will need to be using `csquotes` (≥ 4.3), Bib^LA_TE_X (≥ 3.14) and Biber (≥ 2.14). If you want to take advantage of the Bib^LA_TE_X `\DeclareQuotePunctuation` facility to enforce the APA required ‘American’ punctuation, you should normally use the `babel` package with the ‘american’ option (see Bib^LA_TE_X manual section 3.9.1). You can of course use other languages but in such cases, to adhere to APA ‘American’ punctuation rules (following commas moved inside closing quotes etc.), then you should set up `\DeclareQuotePunctuation` yourself as per section 4.7.5 of the Bib^LA_TE_X manual.

If you are using an APA document LaTe_X class, the class should be invoked with the `noapacite` class option as per the documentation. Without this class option, the APA class will automatically try to use plain BibT_EX with the `apacite` style which is completely incompatible with Bib^LA_TE_X.

2.3 License

Permission is granted to copy, distribute and/or modify this software under the terms of the LaTe_X Project Public License, version 1.3c¹. The current maintainer is Philip Kime.

¹<http://www.latex-project.org/lppl.txt>

2.4 History

When I started using BibL^AT_EX, I assumed there would be an APA style. I was wrong. I started to try to make one and realised why there was none. The APA style manual is enormous; the citation and references specifications run over many chapters and are very specific in terms of formatting. They are also not entirely consistent but then again, it is rare to have such a thorough specification to work from. Inconsistencies in the manual and workarounds are noted in the examples document.

2.5 Acknowledgments

Thanks to Philipp Lehman for BibL^AT_EX which really has been a major advance over pure BibT_EX. Thanks to Alexander van Loon for the Dutch localisation. Thanks to Paul Thompson for the suggestion to parameterise the max authors setting. Thanks to George Gkotsis for the Greek localisation. Thanks to Erikson Kaszubowski for the Brazilian localisation. Thanks to Braulio José Solano Rojas for the Spanish localisation. Thanks to Stefan Mayer for the subtitlepunct suggestion. Thanks to Håkon Malmedal for the Norwegian localisation. Thanks to Johann Gründl for the Austrian localisation. Thanks to Svante Kvarnström for the Swedish localisation. Thanks to Hendrik Maryns for further Dutch localisation. Thanks to Tea Tušar and Bogdan Filipič for the Slovenian localisation. Thanks to Sebastian Ørsted for the Danish localisation. Thanks to Jürgen Spitzmüller for the DGPs localisation hints. Thanks to Sergei Golovan for the Russian localisation. Thanks to Vítor Míguez for the Galician localisation.

3 Use

This package is available via T_EXLive as `biblatex-apa`. You can find it through the provided T_EXLive update utilities which will install it automatically for you. If you need to install manually (to use a new version which has not yet been published to the T_EXLive updaters, for example), you can download it from CTAN and then, put the `.cbx`, `.bbx` and `.lbx` files in your `texmf` tree, usually:

```
<texmf>/tex/latex/biblateX/cbx/apa.cbx
<texmf>/tex/latex/biblateX/bbx/apa.bbx
<texmf>/tex/latex/biblateX/lbx/<language>-apa.lbx
```

Specify the style in the usual way when loading BibL^AT_EX. If you are using `babel`:

```
\usepackage[american]{babel}
\usepackage{csquotes}
\usepackage[style=apa]{biblateX}
```

or polyglossia:

```
\usepackage{polyglossia}
\setdefaultlanguage[variant=american]{english}
\usepackage{csquotes}
\usepackage[style=apa]{biblatex}
```

Note that the APA manual requires the forcing of titles into ‘sentence case’, that is, initial cap followed by lower case for sentence units, with the exception of names and material from languages which do not follow English capitalisation. As of version 0.8a, Bib_LT_EX has a `\MakeSentenceCase` macro which deals with this. So, in the traditional Bib_TE_X way, capitalise normally in the `.bib` file, protecting names etc. with the usual brace pairs and the style will take care of forcing the APA-style sentence case in the References section. Unlike the References section, titles in citations in the APA style appear in normal case and the style will ensure this too.

3.1 Package options

`apamaxprtauth=<num>`

This option controls the number of author/editor names which are printed in the References. APA style defaults to 20. You can change this if you really want to fully print all author list references in certain contexts (for example in a CV where you are an author in position 21 ...).

3.2 Localisation

Localisation is provided for APA-specific strings in the accompanying `.lbx` files which are loaded automatically.

Normal use will invoke `babel` with the ‘american’ language or `polyglossia` with ‘american’ variant of ‘english’.

The `english-apa.lbx` is a copy of the `american-apa.lbx` since the default is ‘American’ English.

The APA manual does not mention nor sanction any non ‘American’ English strings but it is quite common for non-English journals to ask for APA style bibliographies and so this must be supported.

If not using the `babel` ‘american’ option, it may be necessary to set up the `\DeclareQuotePunc` option as mentioned in section 2.2 above. You would only need to do this if, for some strange reason, a non-american journal required the (unpleasant) american practice of moving final punctuation marks inside closing quotes.

3.2.1 Date formats

Obviously, an American style uses month/day/year formats. European formats are usually day/month/year. The APA style dictates long date formats and so this

is not really apparent in the bibliography. There is an APA standard for long date formats which may not be correct for European journals using roughly APA formatting standards (German journals tend to have a different long date format, for example). The ‘american’ babel option will give you APA compliant US date formats. Default sensible date formats are included for german, ngerman and french. You should redefine the `\mkbibdatelong` macro in the relevant language `.lbx` file to change this if needed.

A customisable macro `\urldatecomma` determines what comes between the date of a URL and the URL itself. This defaults to the standard comma and space as per APA style but just a space in germanic localisations.

4 Details

The detailed information for this style is contained in the example document and accompanying `.bib` files:

`biblatex-apa.tex` This document.

`biblatex-apa-test.tex`² This document typesets every useful example from (APA 8--10). The examples in it aim to look as much like the APA manual examples as possible. All citation examples in the document are real examples using a `.bib` file.

`biblatex-apa-test-citations.bib` This contains the `.bib` entries for the citations examples. You won’t find anything of interest in this file—it’s just used to provide real data for the citation examples.

`biblatex-apa-test-references.bib` This contains the `.bib` entries for all of the examples in (APA 9--11). This file is the main documentation for the `biblatex-apa` implementation of the APA References section style. To see how the style deals with a particular example from (APA 9--11), look it up in here. Every example is marked with the APA example number and has explanatory notes where necessary.

`apa.cbx` The `biblatex-apa` citations style. It is decently structured with comments but shouldn’t need to be read for normal use.

`apa.bbx` The `biblatex-apa` references style. It is decently structured with comments but shouldn’t need to be read for normal use.

`apa.dbx` The `biblatex-apa` data model additions. This allows users to utilise more natural entry type and field names for certain entries. See comments in the `biblatex-apa-test-references.bib`.

²`biblatex-apa-test.pdf` is also provided and is the typeset version of this LaTeX source file.

- * **.1bx** The `biblatex-apa` localisation files. These files override some language-specific macros for some fixed strings.

4.1 Citations

(APA 8.11) requires that there should be no parentheses around the year of the citation when the citation itself occurs within parenthesis. This is tricky to completely automate within the remit of a citation style since it requires knowledge of the current typesetting state. So, the new citation command

```
\nptextcite[⟨prenote⟩] [⟨postnote⟩] {⟨key⟩} ⟨punctuation⟩
```

is provided for such situations. It is identical to `\textcite` but does not put parentheses around the year and separates items with commas. See examples using this command in `biblatex-apa-test.tex`. There is also a multi-cite version `\nptextcites` that works in the same way as `\textcites`.

The `\fullcite` command uses ampersands, like the references section and there is also a `\fullciteref` command which is the same as `\fullcite` but which fakes a mini references section with APA style indentation and so is not intended to be used inline like `\fullcite`. See examples in the test file.

4.2 References

The references style was based on the BibLATEX default `authoryear-comp` style but is heavily modified. If in doubt read the example references `.bib` as it is commented and you can learn a lot from the examples by picking something close to what you need from the APA examples and then looking in this file to see how it was implemented. Some general notes:

4.2.1 Publication Status

In addition to the standard `PUBSTATE` field publication state localisation string “in press”, the `HOWPUBLISHED` field offers also the following localisation strings (APA 10.8). There is no better way to do this as such states are language dependent and need localisation strings:

manunpub Unpublished Manuscript

maninprep Manuscript in preparation

mansub Manuscript submitted for publication

4.2.2 Authors and Group Authors

APA 7th edition has a concept of a “Group” author (APA 9.11). The style provides the GROUPAUTHOR entry field in all entry types. It is recommended to use GROUPAUTHOR when the author is an organisation or group as there are rules for name lists which are different for group authors (for example (APA 9.8)). AUTHOR is used much more extensively as the main agent of a work and the specific roles for particular agents is handled using biber’s data annotation feature, see below.

4.2.3 Roles

The main role (APA 9.10) is of course specified by the AUTHOR entry field. You can attach specialised roles to any name in the AUTHOR field as required by many examples in (APA 10), using biber’s data annotation feature. This is heavily used in the style and allows easy automation of complex examples like those in (APA 10.12). See the `biblatex-apa-test-references.bib` example file used to generate the main test document. Data annotations can be named and the style requires that you name data annotations for various tasks correctly:

role Data annotation to denote a specialised role for a particular name in the AUTHOR name list or a specialised role for the entire name list. Multiple roles may be specified for a name/name list.

username Literal data annotation to denote a username for an online service associated with a name in the AUTHOR name list.

Examples of these data annotations can be found in example documentation and `.bib` file. Data annotations are generally used when particular names in a name list require annotating with a specialized role.

Some roles:

- Editor(s)
- Translator(s)
- Narrator(s)

are very common and often occur in addition to the AUTHOR name list and so are usually specified by their own entry field. When the specialized role attaches to a complete name list (APA 10.2:26) rather than an individual name in a list (APA 10.12:84), you have the choice to use data annotations or a dedicated name list. The latter is preferable if an appropriate name list exists (it does for all examples in (APA 10)).

There are some special cases for secondary name lists with uncommon roles which are handled with the standard `biblatex EDITORX` fields and associated `EDITORTYPE` fields (APA 10.5:63).

4.2.4 Article types

Since ARTICLE entry types are used extensively for academic journals and also newspaper articles, the KEYWORD “nonacademic” should be specified for articles that are not academic articles in an academic journal. This is because date formatting differs in the style between academic and non-academic articles. This is a more general solution than introducing new entry types which are not supported by other software.

4.2.5 Legal Entry Types

(APA 11) contains the format guidelines for legal references. This is fully implemented and the `biblatex-apa-test-references.bib` demonstrates which entry types and fields are used to produce the (APA 11) examples. There are some custom entry types and fields used to manage this, as you will see in the `.bib` file. Considerable use is made of localisation strings in legal entries due to the requirements that certain strings change their abbreviation status between citations and references (and even between parenthetical and narrative citations).

The localisation strings for the U.S. specific elements of this section (most of it) are not provided in other languages as there is not much point. Feel free to copy them from `american-apa.lbx` if you really need to. Localisation strings for all 50 U.S. States are provided to support state constitution references.

Pay attention to the JURISDICTION entries in the example `.bib` which use biber’s data annotation feature in order to match the required style elements. The names of the data annotations are not optional and must match the examples.

5 Revision history

9.6 2020-02-22

Bugfixes

9.5 2020-02-01

Bugfixes

9.4 2019-12-22

Bugfixes

9.3 2019-12-21

Rationalised some entrytype usage

9.2 2019-11-29

Bug fixes

9.1 2019-11-27

Bug fixes, internal improvements and implementation of (APA 11).

9.0 2019-11-23

First release (of APA 7th edition style)