APA `biblatex` style

Citation and References macros for `biblatex`

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Contents

1 Introduction

1.1 About

This package is a `biblatex` style for APA (American Psychological Association) style compliant documents typeset in LaTeX. It implements a citation style (`apa.cbx`) and a references section style (`apa.bbx`). The styles are loaded just like any other `biblatex` styles but I wouldn't try to use the citation and references styles separately as they rely on each other, macro-wise, in places.

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 (5th Edition).

1.2 Requirements

You will need to be using `csquotes` ($\geq$ 4.3) and `biblatex` ($\geq$ 0.8a). If you want to take advantage of the `biblatex` `\DeclareQuotePunctuation` facility to enforce the APA required 'American punctuation', you should use the `babel` package with the 'american' option (see `biblatex` 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 `4.6.5` of the `biblatex` manual.

If you are using the `apa.cls` LaTeX class, you need be using version $\geq$ 1.3.4. The class should be invoked with the `noapacite` class option as per the `apa.cls` documentation. Without this class option, the `apa.cls` class will automatically try

to use plain BibTeX with the `apacite` style which is completely incompatible with `biblatex`.

1.3 License

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1.4 History

When I started using `biblatex`, I assumed there would be an APA style when I went looking. 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 to about 60 pages 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. There are some parts of the requirements which are impossible to automatically satisfy given the current reliance of `biblatex` (as of version `0.8`) on BibTeX. These limitations are described below.

1.5 Acknowledgments

I wished I could acknowledge someone as then this wouldn't have been such a huge piece of work ... thanks to Philipp Lehman for `biblatex` which really has been a major advance over pure BibTeX.

2 Use

Put the `.cbx` and `.bbx` files in your texmf tree, usually:

```
<texmf>/tex/latex/biblatex/cbx/apa.cbx
<texmf>/tex/latex/biblatex/bbx/apa.bbx
```

Specify the style in the usual way when loading `biblatex`.

```
\usepackage[american]{babel}
\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

[1] http://www.latex-project.org/lppl.txt

0.8a, `biblatex` has a `\MakeSentenceCase` macro which deals with this. So, in the traditional BibTeX way, capitalise correctly 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.

2.1 Options

2.1.1 noremoteinfo

This option can be set at a global level:

```
\usepackage[noremoteinfo,style=apa]{biblatex}
```

or on a per-entry basis in the `.bib` file:

```
OPTIONS = {noremoteinfo}
```

It has the effect of suppressing the printing of any URL and retrieval information. This is because many people get their `.bib` entries from services like PubMED which always include URL or DOI information in the entries. Users may not want to always have this information displayed in their References section since it clutters things up. By default, `biblatex-apa` will always display such information if it is available in the `.bib` entry

2.2 Limitations

There are certain limitations you need to bear in mind when using these styles. The APA manual is written without any regard for automation of the citation and references styles—it just tells you how it wants things to look and the implicit assumption is that you would type out everything by hand if necessary. Having said that, the vast majority of the APA citations and references style is implemented, there are just a few exceptions which are either hardly worth the coding pain for such rare cases or which are impossible due to `biblatex` limitations. It is likely that with future `biblatex` versions some or indeed all of these limitations may be lifted but that's not likely until after `biblatex` version `1.0`, according to the `biblatex` author Philipp Lehman.

2.2.1 Citation Limitations

- `(APA 3.95)` Disambiguation of truncated author name lists. This is currently impossible to automate via a `biblatex` style. The `maxnames` and `minnames` options of `biblatex` only serve to specify the truncation limits but do not disambiguate name lists which truncate to the same string. This cannot be

reliably done in the style since it would need to build a backwards and forward list of identical truncations and map these onto the internal `fullhash` field of `biblatex` in order to determine which truncations need disambiguating. Since there is no way of knowing, when you truncate something, whether something later in the document would have the same truncation (without `.aux` file support anyway), this is not really possible. It's also further complicated by the fact that BibTeX doesn't really support name lists in a way which would make this possible and since the main name list processing is done in `biblatex` by BibTeX still, there isn't much that can be done about this at the moment until `biblatex` moves to using something other than BibTeX for its data. See the following Usenet thread:

http://groups.google.com/group/comp.text.tex/browse_thread/thread/f3c50d7065159ad4#

A related issue is that the `uniquename` option doesn't work in lists of authors, again because all the name processing is done by BibTeX. Currently, `biblatex` disambiguates non-unique names in lists by using the `labelyear` mechanisms which is against APA style (and most styles since this is supposed to disambiguate same author(s)/different year situations) but there's nothing really that can be done about it at the moment. Thankfully, these two problems are not that common and only occur when you have long lists of authors which share many members with variations in initials etc.

- There are some anomalies like `(APA 4.16 Example 17)` where two years are supposed to be cited but one of the years is embedded in the `.bib` entry in information that is not parsed out. There isn't much to be done about this at the moment apart from copying some of the information into other fields like `ORIGYEAR` as in `(APA 4.16 Example 40)`. There isn't even that option in `(APA 4.16 Example 17)` because `ORIGYEAR` and `YEAR` are the opposite way round to all other such examples.
- If you use `\marginpar` or other commands that reset the paragraph counter, then the code which tracks citations within paragraphs in order to decide whether to print a year or not will probably break. There is probably some esoteric way of making this not happen but I'm not enough of a TeX hacker to deal with this at the moment. Then again, the APA guide explicitly states that year elision is reset per paragraph and so if you add extra pseudo-paragraphs etc. it's probably your own fault if it breaks ...

2.2.2 Reference Section Limitations

(APA 4.08) Can't deal yet with authors listed as 'with'.

(APA 4.16 Example 36) Can't specify separate Volume and Series editors in this way. See the example in biblatex-apa-test-references.bib for an alternative that should be acceptable for APA style.

(APA 4.16 Example 17,40) It's rather hard and/or messy to automatically and properly format things like the additional 'retrieved/reprint from' sections. It is possible using the XREF field and custom citation drivers in the references but this means setting mincrossrefs to 1, which breaks the APA requirement to only include main-body cited works (APA 4.01). It's also not obvious which field to use to contain the introductory string. Also, there is no way to automatically XREF the page range in the reprint specification in, for example, (APA 4.16 Example 40). This will have to wait until biblatex gets a real data model backend. The ADDENDUM field will have to do for now.

3 Details

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

biblatex-apa.tex This document.

biblatex-apa-test.tex [2] This document typesets just about every useful example from (APA 3.94)–(APA 3.103) and (APA 4.01)–(APA 4.16). 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. This document also typesets every Reference section example from (APA 4.16).

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 date for the citation examples.

biblatex-apa-test-references.bib This contains the .bib entries for all of the examples in (APA 4.16). 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 4.16), look it up in here. Every example is marked with the APA example number and has explanatory notes.

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

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

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

3.1 Citations

`(APA 3.103)` requires that there should be no parentheses around the year of the citation when the citation itself occurs within parenthesis. This would be really too much to completely automate as it is without 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`.

The requirement in `(APA 3.95)` for years only in the first cite in a paragraph is tricky but was possible to do with some rather deep TeX magic which nobody should be under any illusions about: I found out how to do it by reading the UK TeX FAQ.

3.2 References

The references style was based on the `biblatex` default `authoryear-comp` style but is so heavily modified, it's almost unrecognisable. Some general notes:

- Many things in brackets at the end of the reference entries in the examples in `(APA 4.16)` can be dealt with by simply including them in the `ADDENDUM` `.bib` field. This shouldn't be necessary too often but sometimes it's the best (only) way of dealing with an example.
- There are occasions where there is no sensible `.bib` key to use. This applies to things like `MOVIE` and `VIDEO` entries mainly. The format of these requires that different roles (Director, Producer etc.) are separately specified for different names. This is not really possible for the usual `AUTHOR` or `EDITOR` fields (again, another limitation of BibTeX, see 2.2 above). In such cases, I have resorted to the `biblatex` custom `NAME` and `NAMETYPE` fields which are not very portable but until BibTeX is replaced by something more flexible, there is no way round this without making things very messy.
- APA style sometimes refers to the 'series' of a multi-volume work `(APA 4.16 Example 36)`. This corresponds to the `MAINTITLE` field in the `.bib` and *not* the `SERIES` field.
- In the entries, I sometimes use `DATE` and sometimes use `YEAR/MONTH/DAY`. These can generally be used interchangeably, see `biblatex` docs. The same applies to `URLDATE` and `URLYEAR/URLMONTH/URLDAY`.

- `VOLUME`, `NUMBER` and `CHAPTER` are forced into arabic numerals if they are given as roman numerals, as required by `(APA 4.03)`.

Examples from `(APA 4.16)` in `biblatex-apa-test-references.bib` which cannot be dealt with cleanly are marked with the line

```
%%%%%%%%%%%%%%%%%%%%%%% NOT COMPLETE %%%%%%%%%%%%%%%%%%%%%%%
```

and a comment explaining the issue.

4 Revision history

0.1 2008-12-01

Initial release

0.2 2008-12-06

Added `noremoteinfo` option (see section 2.1).

Fixed bbx bug with more than 7 authors still printing names after 'et al'. Was due to resetting maxnames to 999.

Removed the customised (hacked) `apa-biblatex.cls` class from the package as `apa.cls` version 1.3.4 is compatible with `biblatex`.

Altered documentation about requiring the 'american' babel option. This is not required if you set up `\DeclareQuotePunctuation` yourself.

Added minimum required version of `csquotes`.

Minor doc tweaks.