



Memorandum

To: Interested parties

From:
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Subject:
Maintenance infrastructure for Indigo Book and the JM Indigo Book style

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Overview

Indigo Book (IB) specifies citation forms for use in writing about US law. The guide must be updated from time to time, both to extend its scope of coverage, and to reflect periodic changes in the citation fashion world. The JM Indigo Book style (JM-IB style) for Jurism is a machine implementation of the IB citation rules, used to generate context-sensitive citations in user documents and bibliographies. When the IB guide is updated, the code of the JM-IB style must also be revised.

While both IB and the JM-IB style ultimately serve the same audience—authors of legal text—their maintenance draws on different skill sets: while IB describes the (possibly handwritten) human-readable form of citations, the JM-IB style is expressed in the CSL-M style language¹ used to automate that output. Given the complexity of legal citation conventions, separate maintenance of the two resources is burdensome, with significant replication of work.

This memo outlines an integrated approach to IB and JM Indigo Book updates, with a view to streamlining the maintenance of both.

¹CSL-M is short for “Citation Style Language for Juris-M,” and extension of the CSL grammar recognized by Zotero and other fine reference management tools.

Document view

In the HTML view of the IB text, citation examples would be decorated with link markup, shown as a dotted underline in the example below.

R11. Full citation

R11.1. Elements of a full citation. When providing a full citation to a case, you should generally include the following:

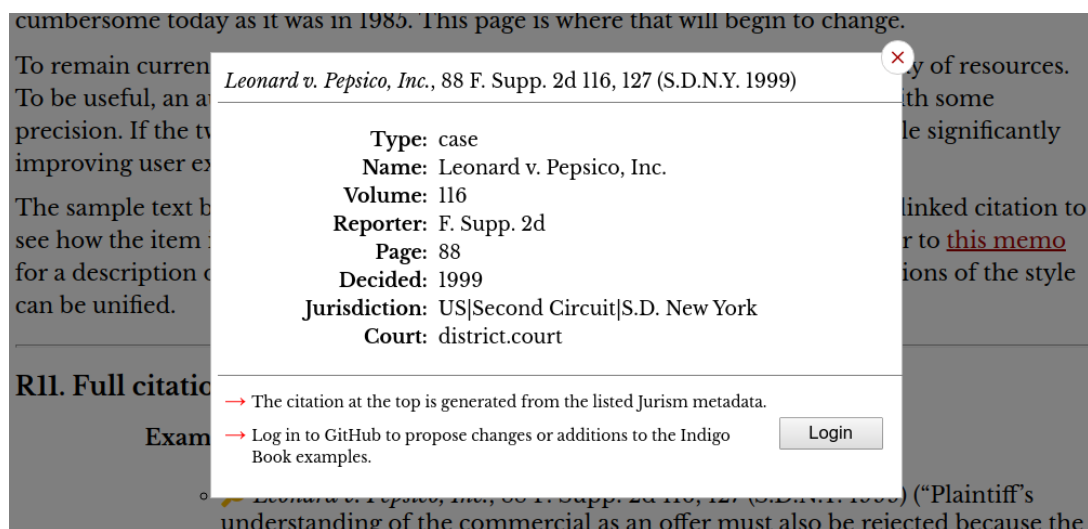
1. case name;
2. volume number, reporter, first page;
3. pincite (the exact page number you are referring to, if necessary);
4. court, year (see special instructions below for pending and unreported cases);
5. explanatory parenthetical (if necessary);
6. prior or subsequent history of the case (if any).

Examples:

- *Leonard v. Pepsico, Inc.*, 88 F. Supp. 2d 116, 127 (S.D.N.Y. 1999) (“Plaintiff’s understanding of the commercial as an offer must also be rejected because the Court finds that no objective person could reasonably have concluded that the commercial actually offered consumers a Harrier

Feedback popup

Clicking on the link would expose a popup showing the Jurism fields from which the citation is generated and, for logged-in users,² a form for proposing a change to the example.

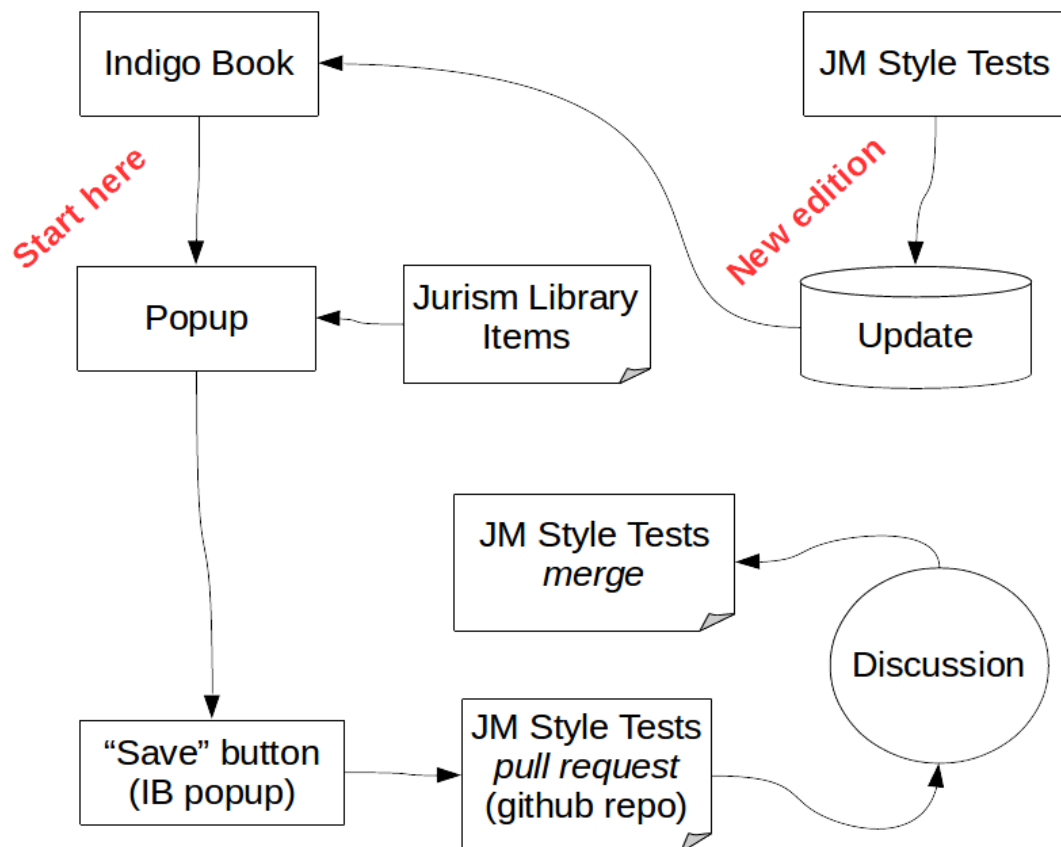


²The login mechanism is not shown in this example. It would be implemented as a GitHub login, to enable the “saving” of a suggested change as a GitHub pull request (see below). In terms of the document UI, a simple solution would be to add a “Login” button to the popup, immediately below the metadata listing.

Editorial workflow

To casual readers, the popup would thus just show a simple quick reference, listing the Jurism metadata needed to produce a correct citation. For logged-in users, the popup would also provide a self-explanatory mechanism for suggesting changes to the IB guidelines and the JM-IB style.

Clicking the “Save” button would open the suggestion for review by an editorial panel, leveraging the version control and discussion infrastructure of GitHub to manage discussion and disposition. The workflow is illustrated below.



The moving parts in this diagram may need some explanation.

Jurism Library Items

Each of the examples in the Indigo Book text will have a corresponding item in a companion library online. This will be a standard `zotero.org` shared library (such as this one), editable through a Jurism client by editors with appropriate permissions, and accessible via the Zotero API.

Popup

The popup links written into the IB text will call for item metadata over the Zotero API using JavaScript activated by clicking the link, and use the returned values to build the popup view.

JM Style Tests

Each item in the Jurism library will have a corresponding test fixture, stored in a GitHub project. The tool for generating and running these fixtures (`cs1run`, provided by the Node package `citeproc-test-runner`) has been developed.

“Save” button

The “Save” button will recompose a test fixture, and file it as a “pull request,” a proposed change to the existing fixture, via the GitHub API, accessible to logged-in users.

Discussion

GitHub pull requests are associated with a tracker, where the proposed change can be discussed, possibly modified, and either accepted for merge or rejected. The tracker is similar to an ordinary discussion forum. By leveraging this infrastructure, we avoid the need for maintenance of bespoke editorial support tools specific to IB and JM-IB.

Update

From time to time, proposed citation changes that have been discussed and merged can be folded into the IB text for release as a new edition, together with any edits to the IB text itself. The update would be automated by a separate tool, run independently of the workflow for proposed changes by a citation-maintenance editor.