Memorandum

To: Interested parties

From:
Frank Bennett

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

Date:
February 10, 2020

Overview

This memo should be read in conjuction with the Indigo Book + Jurism Demo page.

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 bibliographic fashion. The JM Indigo Book style (JM-IB) for Jurism is a machine implementation of the IB citation rules, capable of generating 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. When the two are aligned, users save time, which can be put toward improving arguments and reflecting on ethical obligations.

Development of IB and JM-IB has until now proceeded in parallel, the former being the domain of lawyers, and the latter the territory of citation geeks versed in the CSL-M style language.[1] This has led to discrepancies, holes in coverage, and replication of effort. Quality on both sides can be improved, and maintenance burdens lightened, by working together to build a common ecosystem for the support of legal drafting.

The two projects have arisen as volunteer efforts motivated by idealism: IB by the conviction that legal citation standards are a public resource that should be freely available; and JM-IB by a belief that reference manager support should be brought to bear on legal writing. Both have achieved their initial aims through the dedication of highly motivated individuals; but there are costs associated with maintenance, and the potential benefits of both efforts will depend on sustainability.

It is a principle that both the Indigo Book and the Jurism reference manager be open-source, open-access tools. This is critical to their core objectives, and essential for their broad dissemination. At the same time, soliciting voluntary contributions in recognition of their existence is unlikely to generate much enthusiasm among users or professional bodies: the products are out there, and while their value would decline over time if not maintained, there is no cliff-edge to access or functionality to motivate a funding drive.

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[1] CSL-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.

To encourage continuing contributions from end users, access to an enhanced copy of Indigo Book, as illustrated in the demo page, could be offered as a value-added service tied to a Patreon pledge, together with a support forum for members. The integration can be fully automated. The demo page illustrates login via the GitHub API for submission of errata. In a similar fashion, the popup examples themselves, currently shown in the clear, could be made to depend on login via the Patreon API, and maintenance of a pledge there. If done well, the popup guidance should allow users to quickly set to work on legal projects in Jurism. Once in the circle, some users will continue their support over time, gradually expanding the support base for maintenance of both Indigo Book and Jurism.

The remainder of this memo concerns an editorial workflow built around an enchanced Indigo Book page, leveraging GitHub and the automated citation infrastructure embedded in Jurism.

Document view

In the HTML view of the IB text, citation examples would be decorated with link markup, shown in the example below.
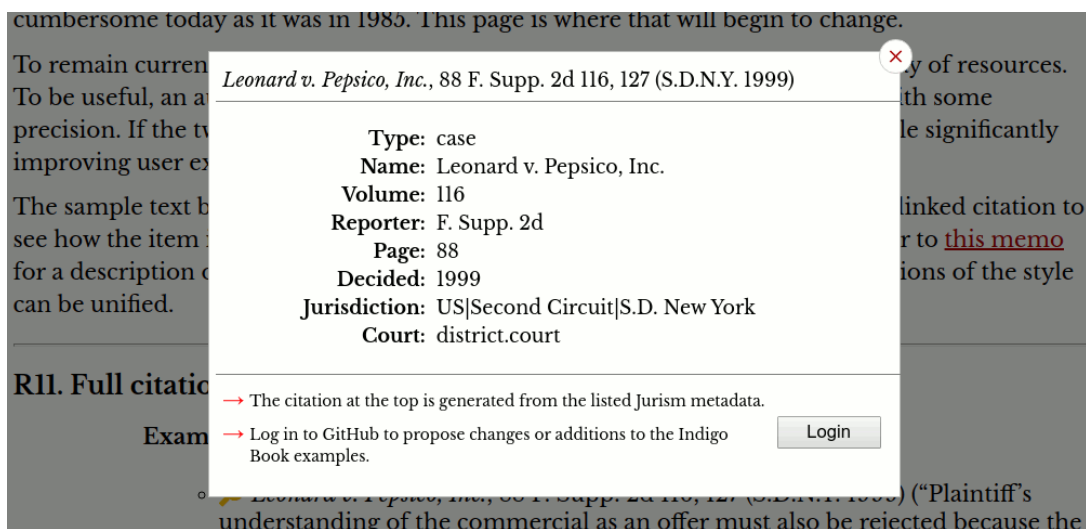
> **R11. Full citation**
>
> **Examples:**
>
> - 🔍 *Leonard v. Pepsico, Inc.*, 88 F. Supp. 2d 116, 127 (S.D.N.Y. 1999) ("Plaintiff's understanding of the commercial as an offer must also be rejected because the Court finds that no objective person could reasonably have concluded that the commercial actually offered consumers a Harrier Jet."), *aff'd*, 210 F.3d 88 (2d Cir. 2000).
> - 🔍 *Toolson v. N.Y. Yankees, Inc.*, 346 U.S. 356 (1953) (per curiam) (affirming baseball's exemption from the scope of federal antitrust laws).

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.
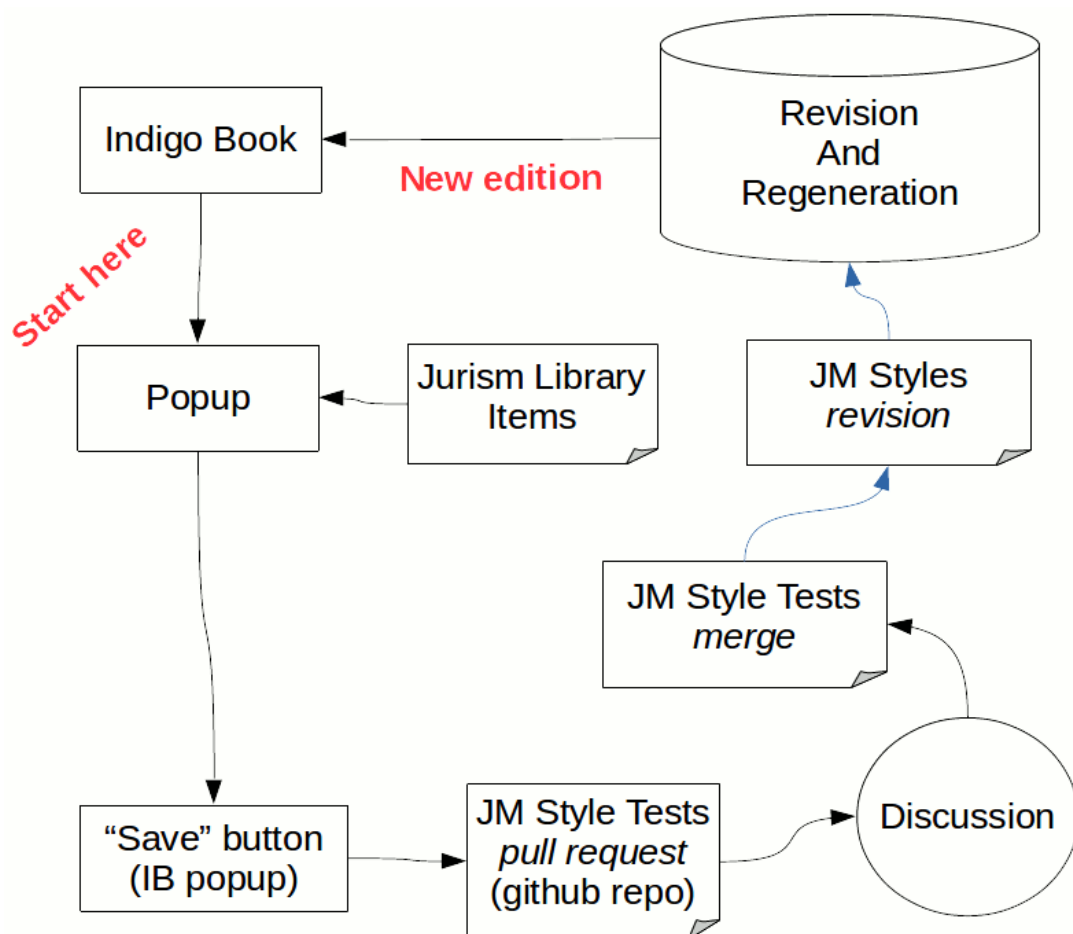

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[2] The login mechanism is not shown in this example. It would be implemented as a GitHub login, to enable the "saving" of a suggested change as a GitHub pull request (see below). In terms of the document UI, a simple solution would be to add a "Login" 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 in the Appendix below.

Appendix

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 (`cslrun`, 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.