

biblatex-publist

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Abstract

The biblatex-publist package provides a *biblatex bibliography style file* (*.bbx) for publication lists, i. e. a bibliography containing one's own publications. The style file draws on biblatex's *authoryear* style per default (which can be changed), but provides some extra features needed for publication lists, such as the omission or highlighting of the own name from/in author or editor data. The package requires at least version 3.8 of the biblatex package¹ and biber (the respective version as required by biblatex).

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*Please report issues via <https://github.com/jspitz/biblatex-publist>.

¹For biblatex, see <http://www.ctan.org/pkg/biblatex>.

1 Aim of the package

The biblatex-publist package ships a *biblatex bibliography style file* (*.bbx) for a specific task: academic publication lists. Such lists, which are a central part of the academic CV, contain all or selected publications of a specific author, usually sorted by genre and year. Even though publication lists are actually nothing else than (specific) bibliographies, they diverge from those in some respects. Most notably, it is widespread practice to omit your own name in your publication list and only list your co-authors, if there are any, or to highlight your own name (e. g., with bold face letters). If you want to follow this practice, a normal bibliography style does not produce the desired result.

Given the fact that maintaining a publication list is a routine task in an academian's life, it is surprising how few specified solutions exist to generate such lists (particularly from BibTeX data). For traditional BibTeX, Nicolas Markey provided a specific BibTeX style file, *publist.bst*², which helps a lot if you want to produce a publication list with BibTeX. The biblatex-publist package is the result of the aim of emulating the features of *publist.bst* with biblatex's means. It partly draws on Markey's conceptual ideas. Bug reports, comments and ideas are welcome.

2 Usage

2.1 Standard usage

The standard way of using the package is to load the style file via

```
\usepackage[bibstyle=publist]{biblatex}
\plauthorname[first name][von-part]{surname}
```

\plauthorname

The `\plauthorname` macro³ (at least with the mandatory *surname* argument) needs to be given (at least⁴) once. It informs the style file which name(s) it should suppress or highlight in the author/editor list (usually yours).

With the default settings, the author/editor name(s) will be omitted completely for all of publications which are authored or edited only by the specified person(s), as in:

2012. Some recent trends in gardening. In: *Gardening Practice* 56, pp. 34–86.

If there are co-authors/co-editors, your name(s) will be filtered out and the collaborators added in parentheses, as in:

1987 (with John Doe and Mary Hall). Are there new trends in gardening?
In: *Gardening Practice* 24, pp. 10–15.

²<http://www.lsv.ens-cachan.fr/~markey/BibTeX/publist/?lang=en>; see also [2].

³The macro was named `\omitname` until v. 1.4 of the biblatex-publist package. The old macro still works, but is marked as deprecated.

⁴See sec. 2.3 for the case of handling multiple authors and name variants.

If `plauthorhandling=highlight` is used (see next section), the plauthor(s) will be printed in bold face instead, as in:

Doe, John, **Myself, Me** and Hall, Mary, **1987**. Are there new trends in gardening? In: *Gardening Practice* 24, pp. 10–15.

Note that `\plauthorname` expects the name constituents as they are recorded in the database (special characters will be expanded). The option `plauthorfirstinit` (see next section), however, allows you to pass only an initial character instead of a first name.

2.2 Additional options

Currently, the following additional options are provided (next to the options provided by the biblatex package itself⁵):

`plauthorname=<surname>`

`plauthorfirstname=<first name>`

`plauthornameprefix=<von-part>`

This is an alternative to the `\plauthorname` macro described in sec. 2.1.⁶ However, due to the way bibliography options are implemented in biblatex, this only works if your name does not consist of non-ASCII characters. Hence, the `\plauthorname` macro is the recommended way.

`plauthorhandling[=omit|highlight]` default: *omit*.

By default, the publist author (as defined with `plauthor`) is omitted from the author or editor list. If you use the option `plauthorhandling=highlight`, it is highlighted instead (i. e., set in bold face by default; see sec. 3.1 how to change that).

`nameorder[=family-given|given-family]` default: *family-given*.

By default, the author and editor names with `plauthorhandling=highlight` are output in the order “Lastname, Given Names”. To change the order to “Given Names Lastname”, pass the option `nameorder=given-family` to biblatex.

`boldyear[=true|false]` default: *true*.

By default, the year (or pubstate, if no year is given) is printed in bold face. To prevent this, pass the option `boldyear=false` to biblatex.

`marginyear[=true|false]` default: *false*.

With this option set to **true**, the publication year (or pubstate) will be printed in the margin once a new year starts. The option also has the effect that all marginpars are printed “reversed”, i. e. on the left side in one-sided documents (via `\reversemarginpar`).

⁵Please refer to the biblatex manual [1] for those.

⁶The options were called `omitname`, `omitfirstname` and `omitnameprefix` until v. 1.4 of biblatex-publist. The old options still work, but are marked as deprecated.

plnumbered[=**true**|**false**|**reset**] default: *true*.

By default, the publication list is numbered continuously. If you divide your publication list into sections by means of `\refsections` (as documented in section 6), you will thus get a global numbering over all sections.

If you prefer the numbering to start from 1 at each section instead, set this option to **reset**.

If you do not want to have any numbers at all, set this option to **false**.

plauthorfirstinit[=**true**|**false**] default: *false*.

If you set this option to true, you can (and are supposed to) pass only an initial character as first name value of `\plauthorname` (e. g., `\plauthorname[J]{Doe}` or `\plauthorname[J][van]{Doe}`). In consequence, biblatex-publist will consider all entries of the specified given name (and prefix, if specified) whose prename starts with the specified character. This allows you to deal with databases that record entries of your work with abbreviated and full first name (J. DOE and well as JOHN DOE and JOHN ROBERT DOE) *as well as* works of colleagues with the same surname (maybe your family members), which you will not want to mark as your own's. Of course, the solution does not help if there is an entry with same surname and same first name initial (such as JANE DOE).

2.3 Handling multiple authors and/or name variants

If multiple `\plauthorname` specifications have been entered (or a `\plauthorname` specification in addition to a specification via the options `plauthorname`, `plauthorname` and `plauthornameprefix`), all of them will be considered.

Thus it is possible to highlight multiple authors in the publication list (for instance to mark contributions of a research team):

```
\usepackage[style=publist,plauthorhandling=highlight]{biblatex}
\plauthorname[Cristiano]{Ronaldo}
\plauthorname['Angel][Di]{Mar'ia}
\plauthorname{Neymar}
```

Multiple specifications can also be used to deal with name variants:

```
\plauthorname[Bill]{Gates}
\plauthorname[William]{Gates}
\plauthorname[William Henry]{Gates}
\plauthorname[William H.]{Gates}
```

Since the latter is also useful with `plauthorhandling=omit`, this mode also considers multiple specifications. By entering something such as the former, it is even possible to omit more than one and different authors from the entries (and biblatex-publist will take care of the change in the author separation this involves; think of final *and* vs. *comma*, which have to be adjusted accordingly if names are omitted). However, it does not strike me sensible to do so (in other words, if you need to deal with a *team* of authors, you should really consider to use `plauthorhandling=highlight`).

Note that this also applies to filtering (see sec. 7), i. e., the **mine** filter considers entries authored by *any* of the specified persons.

3 Customization

3.1 Auxiliary macros and lengths

`\plmarginyear` The appearance of the *marginyear* is controlled by the `\plmarginyear` macro, which has the following default definition:

```
\providecommand*\plmarginyear[1]{%
  \raggedleft\small\textbf{#1}%
}
```

If you want to change the appearance, just redefine this macro via `\renewcommand*`.

`\plauthorhl` The highlighting of the publication list author, if `plauthorhandling=highlight` has been set, is controlled by the `\plauthorhl` macro, which has the following default definition:

```
\providecommand*\plauthorhl[1]{%
  \mkbibbold{#1}%
}
```

If you need another form of highlighting, redefine this macro via `\renewcommand*`.

`extralabel-numberwidth` The indentation of the bibliographic entries (lines > 1) can be adjusted by setting the length `extralabelnumberwidth` via `\setlength` (default is 0pt). This might be needed for long bibliographies (> 99 entries) in order to adjust to the extra space the item number needs.

3.2 Using a different base style

By default, biblatex-publist loads biblatex's *authoryear* style, and it has been written to work with that style. However, it is possible to try a different base style, if *authoryear* does not fit your needs.

In order to do so, enter the following *before* loading biblatex:

```
\newcommand*\publistbasestyle{<stylenam>}
```

where <stylenam> is the name of the biblatex bibliography style (*bbx*) you want to use, without the *bbx* extension (e. g., `\newcommand*\publistbasestyle{mla}`).

Note, though, that there is (and can be) no guarantee that biblatex-publist will work with all styles, although it has been successfully tested with several. Be prepared to bump into \LaTeX errors and carefully check the output for correctness if you try a different base style.

Note, further, that the order of author's and editor's given and family names is hardcoded in biblatex-publist due to the complex omission/highlighting mechanism. This might differ from what you expect with specific base styles. To change the order, use the package option **nameorder** (see sec. 2.2).

4 Localization

Since the package draws on biblatex, it supports localization. The following additional localization keys (`\bibstrings`) are added by the package:

- *with*: the preposition “with” that precedes the list of co-authors by default (i. e., with `plauthorhandling=omit`).
- *partrtranslationof*: the expression “partial translation of” for entries referring to partially translated work via biblatex’s “related entries” feature (see sec. 5.2).

Currently, these additional localization keys are available in the following languages: English, French and German.⁷

5 Further Extensions

The following extensions of standard biblatex features are provided.

5.1 Review bibliography type

Although a *review* entry type is provided by biblatex, this type is treated as an alias for *article*. The biblatex-publist package uses this entry type for a specific purpose: Foreign reviews of your own work. It therefore defines a new bibliography environment *reviews* with a specific look (particularly as far as the author names are concerned) and its own numbering; furthermore, it redefines the *review* bibliography driver. The purpose of this is that you can add other people’s reviews of your work to your publication list, while these titles are clearly marked and do not interfere with the overall numbering (see sec. 6 for an example).

5.2 Partial translations

A new “related entry” type *partrtranslationof* is provided. This is an addition to the *translationof* related entry type biblatex itself provides. Please refer to the biblatex manual [1] on what “related entries” are and how to use them.

6 An example

Publication lists are usually categorized by genre (monographs, articles, book chapters, etc.). For this task, the use of refsections (see [1, sec 3.7.4] for details) is suggested. Other possibilities were not tested extensively and might fail (in particular as far as the numbering of the items is concerned).

The suggested procedure is to maintain separate bib files for each category, say *mymonographs.bib*, *myarticles.bib*, *myproceedings.bib*.⁸ Then a typical file would look like example 1 (p. 7).

⁷Please send suggestions for other languages to the package author.

⁸But see sec. 7 for an alternative.

Example 1: Typical document

```
\documentclass{article}
\usepackage[T1]{fontenc}
\usepackage[latin9]{inputenc}

\usepackage{csquotes}% not required, but recommended
\usepackage[style=publist]{biblatex}
\plauthorname[John]{Doe}

\addbibresource{mymonographs.bib}
\addbibresource{myarticles.bib}
\addbibresource{myproceedings.bib}

\begin{document}

\title{John Doe's publications}
\date{\today}
\maketitle

\section{Monographs}
\newrefsection[mymonographs]
\nocite{*}
\printbibliography[heading=none]

\section{Proceedings}
\newrefsection[myproceedings]
\nocite{*}
\printbibliography[heading=none]

\section{Articles}
\newrefsection[myarticles]
\nocite{*}
\printbibliography[heading=none]

\end{document}
```

If you want to add other people’s reviews of your work, add a section such as the following:

Example 2: Adding foreign reviews

```
\subsubsection*{Reviews of my thesis}
\newrefsection[mythesis-reviews]
\renewcommand\bibfont{\small}
\nocite{*}
\printbibliography[heading=none,env=reviews]
```

Note that the `\printbibliography` option **env=reviews** is crucial if you want to use the specifics `biblatex-publist` defines for reviews (see sec. 5.1).

7 Filtering

If you have a bibliographic database consisting not only of your own publications, you can extract yours with the bibliography filter **mine**, which has to be passed to `\printbibliography`, as in:

Example 3: Using a bibliography filter

```
\nocite{*}
\printbibliography[heading=none,filter=mine]
```

This will effectively print only publications which have been authored or edited by the person(s) specified as via `\plauthorname` (or the corresponding option).

Of course, you can also use other filter possibilities provided by `biblatex`, such as filtering by type or by keyword. So if you want to extract all of your articles from a larger database with entries of diverse type and authors, specify:

```
\printbibliography[heading=none,filter=mine,type=article]
```

Note that several reruns of `latex` might be required to fix the numbering.

8 Sorting

8.1 Sorting Publication Lists

The sorting conventions of publication lists differ from those of normal bibliographies. Publication lists are usually not sorted by author name, the prime criterion of normal bibliographies, but rather chronologically (usually *descending* from the newest through the oldest publication). How to sub-sort within a year depends on the handling of author names. If you display all authors and only highlight your own (via `\plauthorhandling=highlight`), it probably makes sense to sub-sort first by author name, and then by title. If you omit your own name and just mention your co-authors (the default), it makes more sense to sub-sort by title right away, without taking the author names into account.

To account for these needs, `biblatex-publist` adds some sorting options on top of those that come with `biblatex` itself.

8.2 Sorting Templates

The sorting of items is done via biblatex's sorting mechanism, via so called *sorting templates* (please refer to the biblatex manual for details).

By default, biblatex-publist uses an own template, **ydt**, which sorts hierarchically by year (**d**escending) and title (alphabetically ascending), ignoring author names. This default is used since author name sorting does not make much sense at least in the default configuration, where the own name is omitted and the list of co-authors is presented in a particular way. If you use **plauthorhandling=highlight**, however, the default changes to **ydn**t (a template provided by biblatex itself) which sub-sorts by author names (alphabetically ascending) before sub-sorting by title.

In addition to this default template, biblatex-publist provides some sorting templates that account for the full date (rather than just the year). This is especially useful for sorting talks, since those usually do not only have a year, but a full date (day, month and year). The following templates, with and without author sorting, are provided:

- **ddt**: Sort by full **d**ate (**d**escending) and **t**itle (both ascending).
- **ddnt**: Sort by full **d**ate (**d**escending), author **n**ame and **t**itle (both ascending).
- **dt**: Sort by full **d**ate and **t**itle (all ascending).
- **dnt**: Sort by full **d**ate, author **n**ame and **t**itle (all ascending).
- **ydm**dt: Sort by **y**ear (**d**escending), **m**onth, **d**ay and **t**itle (all ascending).
- **ydm**dnt: Sort by **y**ear (**d**escending), **m**onth, **d**ay, author **n**ame and **t**itle (all ascending).

In order to use any of these, or another sorting template provided by biblatex use biblatex's sorting option, which can be passed either globally (via **sorting=<template>** as a biblatex option) or locally (by means of a `\newrefcontext` macro with the option **sorting=<template>**). So, to sort your talks in descending order by full date in your CV, you would use either

```
\usepackage[style=publist,sorting=ddt]{biblatex}
```

or

```
\newrefcontext[sorting=ddt]  
\printbibliography[heading=none]  
\endrefcontext
```

9 Revision Log

V. 1.16 (forthcoming):

- Major code cleanup.

V. 1.15 (2019-02-22):

- Add support for omitting multiple authors. See sec. 2.3.
- Fix documentation issues.

V. 1.14 (2019-02-21):

- Add support for highlighting multiple authors. See sec. 2.3.
- Fix handling of non-ASCII names.
- Use `\DeclareStyleSourceMap` rather than `\DeclareSourceMap`.
- Update sorting documentation in the wake of biblatex changes.

V. 1.13 (2018-11-30):

- Introduce new sorting templates that ignore names. See sec. 8.2.
- **Change of output!** Use `ydt` template by default. See sec. 8.2.
- Assign `extralabel` independent of author group with `plauthorhandling=omit`.

V. 1.12 (2018-11-25):

- Switch name parsing toggles globally (fixes regression with biblatex 3.12).
- Account for omitted author when adding `\finalnamedelim`.
- Fix issue with initial dot in `nameorder=family-given`.
- Add option `plauthorfirstinit` that allows for specifying initials in first names of `plauthorname`. See sec. 2.2.

V. 1.11 (2018-09-01):

- Fix `marginyear=true` with `labeldateparts=false`.
- Fix problem with empty parentheses in article with standard base style and with `labeldateparts=false`.

V. 1.10 (2018-04-08):

- Extend option `plnumbered` with `plnumbered=reset`. This allows to restart the numbering of the publication list items at `\refsections`.
- Documentation improvements.

V. 1.9 (2018-03-01):

- New option `plnumbered` that allows to omit the numbering of the publication list items
- Documentation improvements.

V. 1.8 (2017-11-14):

- Adapt to biblatex 3.8. This version is now required.
- Rename some macros, using pseudo-namespaces:
 - `date:makedate` \Rightarrow `bpl:date:makedate`
 - `date:labelyear+extrayear` \Rightarrow `bpl:date:labeldate+extradate`
 - `marginyear` \Rightarrow `bpl:marginyear`
 - `rauthor` \Rightarrow `bpl:review:author`
 - `rauthor/label` \Rightarrow `bpl:review:author/label`
 - `year+labelyear` \Rightarrow `bpl:year+labelyear`

V. 1.7 (2017-04-12):

- Output `marginyear` before the author list. This prevents it from being vertically shifted in case of long author lists.

V. 1.6 (2017-04-02):

- New option **nameorder** that allows to change the ordering of author and editor name (**given-family** vs. **family-given** [= default]).
- Use proper name delimiters also for bookauthor.

V. 1.5 (2017-02-28):

- Fix extra *and* in name list with **plauthorhandling=highlight**.
- Whitespace fix with **plauthorhandling=highlight**.
- Use proper name delimiters.

V. 1.4 (2017-02-12):

- New option **plauthorhandling** that defines how the publist author is handled in the publication list (possible values: **omit** [= default], **highlight**).
- New command **\plauthorhl** that determines the aforementioned highlighting.
- Rename **\omitname** to **\plauthorname** (the old macro is still functional, but marked as deprecated).
- Rename **omit*** options to **plauthor*** (the old options are still functional, but marked as deprecated).
- Assure the margin text always starts uppercased (relevant for pubstates).
- Minor corrections to the manual.

V. 1.3 (2016-08-06):

- It is now possible to change the base style that is used by `biblatex-publist`. See sec. 3.2.
- Proper sorting of pubstates.
- Add possibility to increase the indentation of items (by means of the length `extralabelnumberwidth`). See sec. 3.1.
- Use `pagetracker=true` instead of `pagetracker=spread` by default (avoids warning, no change in functionality).

V. 1.2 (2016-05-12):

- Accomodate to the backwards-incompatible changes of `biblatex 3.4` (`prefixnumber` \Rightarrow `labelprefix`, `\ifempty` \Rightarrow `\ifdefvoid`). This version of `biblatex` is now required.

V. 1.1 (2016-03-09):

- Adapt to the `\Declare*Name` changes of `biblatex 3.3`. Since `biblatex 3.3` introduced backwards-incompatible changes that affect `biblatex-publist`, this version of `biblatex` is now required.

V. 1.0 (2015-01-04):

- Add portmanteau `*.cbx` file to allow loading `biblatex-publist` also via the style option (next to `bibstyle`).

V. 0.9 (2014-03-13):

- Fix problem with multi-token names.
- Support name prefix in `\omitname`.
- Support pubstate.

V. 0.8 (2013-08-16):

- Add custom sorting schemes `ddnt`, `ydmnt` and `dnt` (see sec. 8).
- Revise the documentation.

V. 0.7 (2013-07-25):

- Support full dates.

V. 0.6 (2013-07-21):

- Fix numbering with recent `biblatex` versions.

V. 0.5 (2013-05-03):

- Fix numbering if `\printbibliography` is used multiple times within the same or without any refsection.

V. 0.4 (2012-10-30):

- More robust name parsing (especially for names with non-ASCII characters encoded with \LaTeX macros). The code was kindly suggested by Enrico Gregorio.⁹
- Add `\omitname` command (see sec. 2.1).
- Support `firstinits` option.

V. 0.3 (2012-10-23):

- Bug fix: Add missing “and” if omitted name was last minus one.
- Bug fix: Fix output with “et al.” if omitted name is first and `liststop` is 1.
- Set `maxnames` default to 4.
- Add filter possibility (see sec. 7).
- Add French localization.
- Some corrections to the manual.

V. 0.2 (2012-10-21): Initial release to CTAN.

10 Credits

Thanks go to Enrico Gregorio (egreg on *tex.stackexchange.com*) for helping me with correct name parsing (actually, the code the package uses is completely his), user gusbrs on *tex.stackexchange.com*, Marko Budišić, Clea F. Rees, Yannick Kalff and many other users for testing and bug reports, Nicolas Markey for *publist.bst* and of course Philipp Lehman and the current biblatex team (Philipp Kime, Moritz Wemheuer, Audrey Boruvka and Joseph Wright) for biblatex.

References

- [1] Lehman, Philipp (with Audrey Boruvka, Philip Kime and Joseph Wright): *The biblatex Package. Programmable Bibliographies and Citations*. March 3, 2016. <http://www.ctan.org/pkg/biblatex>.
- [2] Markey, Nicolas: *Tame the BeaST. The B to X of BibTEX*. October 11, 2009. <http://www.ctan.org/pkg/tamethebeast>.

⁹Cf. <http://tex.stackexchange.com/questions/79555/biblatex-bibliographyoption-with-braces>.