

APA Bib_{La}T_EX style

Citation and References macros for Bib_{La}T_EX

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Contents

1 Important Changes	1	3 Use	3
		3.1 Package options	4
		3.2 Localisation	4
		3.3 Limitations	5
2 Introduction	2	4 Details	5
2.1 About	2	4.1 Citations	6
2.2 Requirements	2	4.2 References	6
2.3 License	2		
2.4 History	2	5 Revision history	8
2.5 Acknowledgments . . .	3		

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 `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. However, 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 \LaTeX style for APA (American Psychological Association) style compliant documents typeset in \LaTeX . 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 \LaTeX styles but don't try to use the citation and references styles separately as they rely on each other, macro-wise, in places.

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 \LaTeX (≥ 3.14) and Biber (≥ 2.14). If you want to take advantage of the Bib \LaTeX `\DeclareQuotePunctuation` facility to enforce the APA required 'American' punctuation, you should normally use the `babel` package with the 'american' option (see Bib \LaTeX 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 \LaTeX manual.

If you are using an APA document \LaTeX 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 Bib \TeX with the `apacite` style which is completely incompatible with Bib \LaTeX .

2.3 License

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

2.4 History

When I started using Bib \LaTeX , 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

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

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 Bib \LaTeX which really has been a major advance over pure Bib \TeX . 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 `subtitledpunct` 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 \TeX Live as `biblatex-apa`. You can find it through the provided \TeX Live 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 \TeX Live 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 Bib \LaTeX . 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_{La}T_EX has a `\MakeSentenceCase` macro which deals with this. So, in the traditional Bib_{La}T_EX 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

The following options are set as usual in the options passed to `biblatex`.

```
apabackref=true|false
```

It is not APA style to include backreferences in the References to pages where citations of the entry occur. However, this is very useful, especially in proofing and so if you set the `apabackref` option to ‘true’, these are enabled. The default is ‘false’.

```
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 `\DeclareQuotePunctuation` 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.

3.3 Limitations

There are certain limitations you need to bear in mind when using these styles. The APA manual is written without much regard for automation of citation and references processing—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 majority of the APA citation and references style is implemented, there are just a few exceptions which are hardly worth the coding pain since they are ambiguous and easily worked around.

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)–(APA 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.

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

biblatex-apa-test-references.bib This contains the .bib entries for all of the examples in (APA 9) and (APA 10). 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) or (APA 10), 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.

***.ltx** 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 \fullcitebib 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 Bib_{La}T_EX 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.

5 Revision history

9.0 2019-

First release (of APA 7th edition style)