

APA biblatex style

Citation and References macros for biblatex

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Version 4.0
5th October 2011

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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), a references section style (apa.bbx) and string localisation files (<language>-apa.lbx). Currently there are only string localisations for a few languages—if you can help with any other languages, please mail me; the localisation .lbx files are very small and simple and it would be a small translation task for the few APA-specific strings needed. 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 (6th Edition).

1.2 Requirements

You will need to be using csquotes (≥ 4.3) and biblatex (≥ 1.4). Some features will not work¹ without the biber backend for biblatex ($\geq 0.9.2$) which is strongly recommended. If you want to take advantage of the biblatex \DeclareQuotePunctuation facility to enforce the APA required 'American' punctuation, you should normally

¹Automatic name and name list uniqueness disambiguation—see examples doc

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 4.7.5 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

Permission is granted to copy, distribute and/or modify this software under the terms of the LaTeX Project Public License, version 1.3c². The current maintainer is Philip Kime (© 2011).

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. Inconsistencies in the manual and workarounds are noted in the examples document.

1.5 Acknowledgments

Thanks to Philipp Lehman for `biblatex` which really has been a major advance over pure BibTeX. 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.

2 Use

This package is available via TeXLive as `biblatex-apa`. You can find it through the provided TeXLive update utilities which will install it automatically for you. If

²<http://www.latex-project.org/lppl.txt>

you need to install manually (to use a new version which has not yet been published to the TeXLive 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 biblatex.

```
\usepackage[american]{babel}
\usepackage{csquotes}
\usepackage[style=apa]{biblatex}
\DeclareLanguageMapping{american}{american-apa}
```

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, 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 Localisation

Localisation is provided for APA-specific strings in the accompanying .lbx files. To use these files, put an appropriate mapping in your document preamble, after loading biblatex.

Normal use will invoke babel with the ‘american’ babel language. After loading babel and biblatex, put this in the preamble (see full preamble example in [section 2](#) above):

```
\DeclareLanguageMapping{american}{american-apa}
```

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.

Here is an example to load the German localisation strings. This assumes that you are using the babel package with the appropriate language option:

```
\DeclareLanguageMapping{german}{german-apa}
```

This loads the `german-apa.lbx` file which in turn, loads the `german.lbx` file and augments it with APA-specific strings. If you are not using the babel ‘american’ option, then you may need to set up the `\DeclareQuotePunctuation` option as mentioned in section 1.2 above. You would only need to do this if, for some strange reason, a non-american journal required the (rather horrible) american practice of moving final punctuation marks inside closing quotes.

2.1.1 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 `*-apa.lbx` file to change this if needed.

2.2 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.

2.2.1 Reference Section Limitations

(APA 6.27) Can’t deal yet with authors listed as ‘with’.

3 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`³ This document typesets just about every useful example from (APA 6.11)–(APA 6.21) and (APA 7.01)–(APA 7.11). The

³`biblatex-apa-test.pdf` is also provided and is the typeset version of this LaTeX source file.

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.

`biblatex-apa-test-references.bib` This contains the `.bib` entries for all of the examples in (APA 7.x). 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 7.x), look it up in here. Every example is marked with the APA example number and has explanatory notes.

`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.

`*.lbx` The `biblatex-apa` localisation files. These files override some language-specific macros for some fixed strings.

3.1 Citations

(APA 6.13) 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. Please note that APA style does not have multiple citation lists sorted—they appear in the order cited. Since `\fullcitebib` is a citation command, the citations will not be sorted which might appear odd since this 'citation' style looks like a references section excerpt. There is no way around this since the `sortcites` `biblatex` option is a package-level

option. If you want to customise such a fake references section ‘citation’, you should probably be using `\printbibliography` with a filter.

3.2 References

The references style was based on the `biblatex` 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:

- The `\maxprtauth` command returns the number of author/editor names which are printed. APA style defaults to 7. You can reset this after loading `biblatex` with, for example, `\renewcommand{\maxprtauth}{25}` 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 8 ...)
- There are occasions where there is no sensible `.bib` key to use. This applies to things like `AUDIO` 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. In such cases, I have resorted to the `biblatex` custom `NAME` and `NAMETYPE` fields which are not very portable but until the BibTeX backend support is dropped in `biblatex` there is no way round this without making things very messy. This will happen around `biblatex` version 2.0.
- APA style sometimes refers to the ‘series’ of a multi-volume work. This corresponds to the `MAINTITLE` field in the `.bib` and *not* the `SERIES` field.
- `VOLUME`, `NUMBER` and `CHAPTER` are forced into arabic numerals if they are given as roman numerals, as required by (APA 6.22).
- `USERB` is sometimes used to specify that a URL is for an abstract rather than the paper itself. Not very portable but that’s because of `bibtex` data model limitations.
- `USERD` is sometimes used to specify information that indicates special formatting. Not very portable but that’s because of `bibtex` data model limitations.
- `USERE` is sometimes used to specify questionable dates/authors for special formatting. Not very portable but that’s because of `bibtex` data model limitations.

4 Revision history

4.0 2011-10-05

Disabled ‘smart and’ for spanish localisation as it breaks ampersands

3.9 2011-10-03

Fixed data format issue in localisations

3.8 2011-09-25

Fixed slanted/italic confusion in bibliography

3.7 2011-09-23

Fixed issue no dates when labelyear defined

3.6 2011-09-20

Fixed issue with American format long dates

3.5 2011-09-05

Fixed issue Editor name part order when in Author position (thanks to Johann Bauer)

3.4 2011-09-01

Fixed issue with `\fullcite` not resetting `bbx` globals

3.3 2011-08-23

Spanish localisation

3.2 2011-08-12

Minor fix in `inbook` format

Doc clean up

3.1 2011-07-31

Made compatible with `biblatex` 1.6

3.0 2011-05-06

`maxnames` and `minnames` are now set to sensible things and actually used.
`biber ≥ 0.9.3` is now required as this implements a fix for `uniquelist` in `biblatex` which needs `maxnames` and `minnames` set to real values.

Fixed bug with commas before ‘et al’ not appearing in some cases.

2.9 2011-05-03

APA wants no space between volume and number for articles, even though it's horribly ugly...

Made urls not optional with `biblatex url toggle` in `ONLINE` entrytype (thanks to Mattias Erll)

2.8 2011-04-23

Added a Greek localisation strings file.

2.7 2011-04-1

Biber is now a strongly recommended requirement due to APA name and name list disambiguation requirements.

Updated for biblatex 1.4/biber 0.9 with automatic list disambiguation. Package now deals with all APA 6th Edition citation examples.

2.6 2011-03-15

Made `fullcite` use ampersand

Added `fullcitebib` macro to allow fake bib citations

2.5 2010-11-24

Refactored `hyperref` to only link from years to make it consistent across cite commands

Added `hyperref` target references section for citation examples

Fixed `textcite` multicite issue

2.4 2010-11-14

Fixed postnotes/`hyperref` for `textcite`

2.3 2010-11-04

Overhauled `hyperref` functionality and made more robust

2.2 2010-10-15

Parameterised max author/editor list (thanks to Paul Thompson)

Better rudimentary regression script

Completely reconfigured `EPRINT`/`EPRINTTYPE`

2.1 2010-10-17

New Dutch localisation (thanks to Alexander van Loon)

2.0 2010-09-30

Moved to new date format code internally

1.9 2010-09-27

Moved docs to LuaLaTeX compat

Fixed german/ngerman date formats

Cleaned up date format code

1.8 2010-08-06

Fixed seven author ellipsis bug

1.7 2010-08-05

Corrected dateless entry format, added examples to test doc

Corrected multi delim for `\citeyear`

Updated test doc for biblatex 0.9b compat

1.6 2010-07-19

Added correct `\citeyear` definition

1.5 2010-07-12

Corrected NOTE/ADDENDUM examples

Made `\nptextcite` behave more consistently like `\textcite` for multi-cites.

1.4 2010-07-07

Removed extra space after DOI

1.3 2010-07-05

Fixed Oxford comma bug

1.2 2010-06-18

Made style arguments more explicit in `.bbx`

Fixed bad documentation due to beta biblatex version.

Updated docs - minimum biblatex version

1.1 2010-05-28

Fixed INBOOK `citetitle` format to match BOOK.

Fixed `extrayear` in entries with full date specifications.

1.0 2010-05-12

Fixed TYPE and NUMBER fields in REPORT entries. Now more flexible.

PUBSTATE is now valid for articles.

DOI, if present, suppresses any URL field.

Abstract retrieval string is now conditional on USERB field, not on the existence of an abstract.

Default strings for PHDTHESIS and MASTERSTHESIS entries corrected.

LOCATION is now valid for thesis entries and comes after INSTITUTION.

0.9 2010-03-08

Update for APA manual 6th edition and biblatex 0.9

0.8 2010-02-15

Fixed bug with spaces after nptextcite

Updated for biblatex 0.9

0.7 2010-01-20

Made hyperref links more consistent, using the whole citation and not just the year.

0.6 2009-11-20

Corrected two bugs in cite macro which left a trailing space after multiple cites and actually cited the year twice for multiple cite commands in some circumstances.

Corrected bug where \textcite would leave a stray open bracket on the stack when year was suppressed within a paragraph.

0.5 2009-09-19

Replaced literal string with localised form in url macro.

Moved localisation strings into .lbx files.

\DeclareLanguageMapping is now needed in preamble.

Moved \DeclareBibliographyExtras into .lbx files.

Some support for alternative localised date formats.

Fixed slant/italic font problem since the \mkbibemph macro had changed in biblatex 0.8e.

Fixed liststop error which was preventing name lists with two entries from having the comma before the ampersand.

0.4 2009-07-24

Fixed bug where multiple year ranges were not displayed properly.

Updated to remove pre-biblatex 0.8e macros error.

0.3 2008-12-21

Updated to use new fields (`EVENTTITLE`) and new options (`usetranslator`) from biblatex 0.8b.

0.2 2008-12-06

Added `noremoteinfo` option).

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.

0.1 2008-12-01

Initial release