

APA biblatex style

Citation and References macros for biblatex

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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 ($\geq 0.9a$). If you want to take advantage of the biblatex \DeclareQuotePunctuation facility to enforce the APA required 'American' punctuation, you should normally 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 4.6.5 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 1.3c¹. The current maintainer is Philip Kime (© 2010).

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. There are some parts of the requirements which are impossible to automatically satisfy given the limitations of the `.bib` format and BibTeX. These limitations are described below and will be addressed in a future `biblatex` version which supports the more advanced features of the `biber` backend.

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.

2 Use

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
```

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

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 vast majority of the APA citation and references style is implemented, there are just a few exceptions which are either hardly worth the coding pain for such rare cases or which are impossible due to `biblatex` limitations. It is likely that with future `biblatex` versions some or indeed all of these limitations may be lifted but that’s not likely until after `biblatex` version 1.0, according to the `biblatex` author Philipp Lehman.

2.2.1 maxnames/minnames

You can’t reset these `biblatex` options in your document—you’ll get a message about conflicting options. These are set to “999” in `apa.bbx` because of the tricky requirements for APA name list truncation. The truncation is then done in the author list code rather than by using these options. Sorry. This will be changed when `biblatex` moves to using `biber` as a backend with a more sophisticated data model.

2.2.2 Citation Limitations

- (APA 6.14) Disambiguation of truncated author name lists. This is currently impossible to automate via a `biblatex` style. The `maxnames` and `minnames` options of `biblatex` only serve to specify the truncation limits but do not disambiguate name lists which truncate to the same string. This cannot be reliably done in the style since it would need to build a backwards and forward list of identical truncations and map these onto the internal `fullhash` field of `biblatex` in order to determine which truncations

need disambiguating. Since there is no way of knowing, when you truncate something, whether something later in the document would have the same truncation (without `.aux` file support anyway), this is not really possible. It's also further complicated by the fact that BibTeX doesn't really support name lists in a way which would make this possible and since the main name list processing is done in `biblatex` by BibTeX still, there isn't much that can be done about this at the moment until `biblatex` moves to using something other than BibTeX for its data. See the following Usenet thread:

http://groups.google.com/group/comp.text.tex/browse_thread/thread/f3c50d7065159ad4#

A related issue is that the `uniquename` option doesn't work in lists of authors, again because all the name processing is done by BibTeX. Currently, `biblatex` disambiguates non-unique names in lists by using the `labelyear` mechanisms which is against APA style (and most styles since this is supposed to disambiguate same author(s)/different year situations) but there's nothing really that can be done about it at the moment. Thankfully, these two problems are not that common and only occur when you have long lists of authors which share many members with variations in initials etc.

2.2.3 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`² This document typesets just about every useful example from (APA 6.11)–(APA 6.21) and (APA 7.01)–(APA 7.11). 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 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 would be really too much to completely automate as it is 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.

3.2 References

The references style was based on the biblatex default authoryear-comp style but is so heavily modified, it's almost unrecognisable. 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 (again, another limitation of BibTeX, see 2.2 above). In such cases, I have resorted to the `biblatex` custom `NAME` and `NAMETYPE` fields which are not very portable but until BibTeX is replaced by something more flexible, there is no way round this without making things very messy.
- 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

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 `.ltx` files.

`\DeclareLanguageMapping` is now needed in preamble.

Moved `\DeclareBibliographyExtras` into `.ltx` 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