APA BibLaTeX style

Citation and References macros for BibLaTeX

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Contents

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.

6.9
This version requires `biblatex` >=3.4 and `biber` >=2.5.

6.8
This version requires `biblatex` >=3.3 and `biber` >=2.4.

5.0
The style now uses the customisable data model functionality of `biblatex` 2.0 and `biber` 1.0 and so these are now required. Several cases which previously were forced to use custom fields like USERA, USERB etc. can now be more naturally implemented with semantically appropriate fields. See `biblatex-apa-references.bib` for examples. This particularly aids the use of VIDEO entries, for example which now support fields DIRECTOR, PRODUCER, WRITER and EXECPRODUCER.

Entries which relate to other entries like reviews and reprints are now implemented more naturally using the `biblatex` 2 'related entries' functionality. See entries with the RELATED field in `biblatex-apa-references.bib` and the `biblatex` manual for details and examples.

Entries where authors are listed as 'with' are now supported using the name field
WITH. See examples file.

4.5

`biber` is now *required*. This is because APA style needs a custom sorting scheme and
only `biber` supports this. `bibtex` support is going away in `biblatex` eventually
anyway so it's best to switch.

4.4

The `\maxprtauth` command is now a package option called 'apamaxprtauth', see
section .

4.3

Specifying entries as 'in press' should now be done using the official `biblatex`
mechanism for this. Instead of, for example:

```
YEAR = {in press}
```

you should use:

```
PUBSTATE = {inpress}
```

as 'inpress' is a `biblatex` localisation string which will render correctly in sup-
ported languages. If you still use the older method, it will still work but the string
will always appear as the English 'in press'.

2 Introduction

2.1 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`), some data model enhancements (`apa.dbx`) 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).

2.2 Requirements

You will need to be using `csquotes` ($\geq$ 4.3), BibLaTeX ($\geq$ 3.4) and Biber ($\geq$ 2.5). 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 `4.7.5` 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.

2.3 License

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2.4 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.

2.5 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. Thanks to Stefan Mayer for the `subtitlepunct` suggestion. Thanks to Håkon Malmedal for the Norwegian localisation. Thanks to Johann Gründl for the

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[1] http://www.latex-project.org/lppl.txt

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.

3 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 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. If you are using `babel`:

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

  or `polyglossia`:

```
\usepackage{polyglossia}
\setdefaultlanguage[variant=american]{english}
\usepackage{csquotes}
\usepackage[style=apa]{biblatex}
\DeclareLanguageMapping{english}{english-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.

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 7. 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 8 …)

Setting BibLaTeXpackage options which change name processing like `uniquename` and `uniquelist` is not supported as this style does tricky things internally to match the peculiar APA standard. You should not need to change them anyway as then you wouldn't be using APA style anyway.

3.2 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' language or `polyglossia` with 'american' variant of 'english'. After loading `babel/polyglossia` and biblatex, put this in the preamble if you are using `babel` (see full preamble example in section 3 above):

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

or for `polyglossia` (since there is no language 'american' in `polyglossia`—it's just an 'english' variant:

```
\DeclareLanguageMapping{english}{english-apa}
```

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.

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, they you may need 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 (rather horrible) 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 `*-apa.lbx` file to change this if needed.

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 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 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.

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

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`.

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

4.1 Citations

To specify something as 'in press', use the `biblatex` PUBSTATE field with the special key value of 'inpress' (see `biblatex` manual, section 4.9.2.11). See the notes on the PUBSTATE field in section 4.2 below.

(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.

4.2 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 PUBSTATE field takes priority over any date field. If you specify something with a PUBSTATE field like 'inpress', then the year label in citations and the references will be the localisation of the PUBSTATE value key (PUBSTATE takes a pre-defined set of localisation keys as values, see biblatex manual).

- 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).

4.2.1 Retrieval dates for online items

APA 6th edition section 6.32 says 'Do not include retrieval dates unless the source material may change over time (e.g., Wikis)'. This is open to interpretation of what constitutes a Wiki and what counts as 'changing over time'. The style does not implement anything for this requirement by default but you can automate your own interpretation by putting this in your preamble:

```
\DeclareSourcemap{
  \maps[datatype=bibtex]{
    \map{
      \step[fieldsource=url,
            notmatch=\regexp{wiki},
            final=1]
      \step[fieldset=urldate, null]
    }
  }
}
```

8

This will dynamically remove the URLDATE field from any entry where the URL field doesn't match the regular expression 'wiki'. Modify this regular expression according to taste. This modification is dynamically applied to the data stream by `biber` and does not change your `.bib`.

5 Revision history

6.9 2016-05-13

Bug fixes

Requires `biblatex` 3.4+ and biber 2.5+

6.8 2016-03-01

Bug fixes

Updated to use new `\DeclareNameFormat` structure for `biblatex` 3.3+ (which is now required)

6.7 2015-01-23

Bug fixes

6.6 2014-10-23

Bug fixes

6.5 2014-04-16

Bug fixes

Slovenian localisation

6.4 2013-10-30

Fixed explicit 'and others' problem

Improved french localisation

6.3 2013-10-28

Fixed issue where SHORTAUTHOR was only being used for exact same citations.

6.2 2013-10-19

Corrected Dutch translations

Fixed Norwegian lbx corruption

Misc bugfixes

6.1   2013-07-19

Corrected APA 6.12 error and switched to uniquelist=minyear

Documented way of automating some APA 6.32 requirements

6.0   2013-07-10

Added Swedish localisation

Fixed useprefix=false issue

5.9   2013-05-08

Compatibility with `biblatex` 2.6–'nodate' is now part of core

autocite is set to inline

5.8   2013-03-07

Made BOOK like INBOOK for order of online/reprint information

Fixes for recursive RELATED fields

5.7   2012-12-28

New name code to allow full name disambiguation as per APA 6.27

Fixes to IN* types

5.6   2012-12-19

Fixed problems with EVENTDATE format

5.5   2012-12-17

Fixed serial comma requirement (APA 4.03)

5.4   2012-11-28

Updated for `biblatex` 2.4

5.3   2012-11-21

Updated for some `biblatex` changes.

5.2   2012-09-30

Entries with no YEAR no longer fall back on other date fields and use 'nodate' bibstring.

'nodate' bibstring no longer lowercased and supports extrayear

5.1   2012-08-01

Added Norwegian localisation (thanks to Håkon Malmedal)

Fixed some documentation issues

5.0   2012-07-01

Using `biblatex` 2.0/`biber` 1.0 data model facility.

4.8   2012-06-02

Put in proper package version strings

Fixed a problem with `\textcites` (thanks to Florian Sesser and Cornielia Entner for reporting)

4.7   2012-04-19

Made `firstinits=false` possible

Fixed a problem with explicit 'and others' with names (thanks to George Pigman)

4.6   2012-02-08

Reduced the Biber requirement to a warning due to bug in `biblatex` 1.7

Added Italian localisation (thanks to Luca Montanelli)

4.5   2012-01-31

Noted in manual that `biber` is now required due to custom sorting.

Added `INSTITUTION` field to `REPORT` entries

4.4   2012-01-25

`\maxprtauth` command is now a package option 'apamaxprtauth'

New package option 'apabackref' controlling whether backreferences and links to citations appear in the References.

4.3   2012-01-22

'et al' now only replaces two or more names since it's plural

'in press' items now should use the `biblatex` `PUBSTATE` field

Fixed 'in press' hyphenation issue for disambiguation in references

URLs are now by default in roman font as per APA style.

4.2   2011-11-12

Fixed macro name typo

4.1 2011-11-02

`subtitlepunct` now skips if following terminating punctuation

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 $\geq$ 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