

# biblatex-dw

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biblatex-dw is a small collection of styles for the biblatex package. It was designed for citations in the Humanities and offers some features that are not provided by the standard biblatex styles. biblatex-dw is dependent on biblatex, at least version 0.8b (please note also the requirements of the biblatex package itself).

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## 1 Installation

see the file “README”

## 2 Usage

The styles are loaded in the same way as the biblatex standard styles:

```
\usepackage[style=authortitle-dw]{biblatex}
```

or

```
\usepackage[style=footnote-dw]{biblatex}
```

These styles and their additional options are clarified on the next pages. See also the examples “en-authortitle-dw” and “en-footnote-dw” in the examples folder.

## 3 The “authortitle-dw” style

This style is based on the standard “authortitle” style. Besides some changes in punctuation, there are the following differences:

### 3.1 Appearance in the bibliography

- The font shape of authors and editors can be set by the options `namefont` and `firstnamefont` which can take the values ‘`smallcaps`’, ‘`italic`’, ‘`bold`’ and ‘`normal`’. If you set `useprefix=true`, `namefont` affects also the name prefix (i. e. “von”, “de” etc.). If `useprefix=false` is set (which is the default), the name prefix depends on the option `firstnamefont` which in every case affects the name suffix (the “junior” part).
- If you set the `namefont`, but nevertheless need some of the names being typeset in upright shape (e.g. medieval or antique authors), you can add `options={oldauthor=true}` or `options={oldauthor}` to the respective entry of your bib file. If you have to switch back to the normal appearance also for entries with this `oldauthor` flag, you can set the global option `oldauthor=false` in order to override the entry option.
- The option `idembib` provides a possibility to substitute identical authors/editors in subsequent entries in the bibliography by an idem phrase. If set to ‘`false`’, the names are given also in subsequent entries

of the same authors/editors. Using `idembib=true`, the substitution is enabled. The format is then set by the option `idembibformat` which can take the values `'idem'` to get “idem” instead of the name(s) and `'dash'` to get a dash (—). In some languages, the idem phrase is gender-specific. The gender for authors/editors has to be given in the `gender` field of your bib file (see the biblatex documentation for details). The default value for `idembib` is `'true'`, the default value for `idembibformat` is `'idem'`.

- When `author` and `editor` are the same in `@incollection` or `@inbook` entries, the name is not repeated but substituted by the string “idem”. This feature is controlled by the option `edbyidem` which can be set to `'true'` or `'false'`; the default value is `'true'`.
- With default settings, the `publisher` is not printed, only `location` and `year`. If you would like to have the publisher printed, you have to set the option `nopublisher=false`.
- You can also suppress the location with `nolocation=true`. In this case, also the publisher is omitted (regardless of the setting of `nopublisher`). The default setting is `'false'`.
- The position of the editor in `@incollection` and `@inproceedings` entries can be changed: With the option `edbeforetitle=true` the editor is printed before the booktitle, followed by “(ed.)”. With the default behaviour, the editor is printed after the booktitle and introduced by the string “ed. by”.
- The option `origfields` lets you decide, whether you would like to have the fields `origlocation`, `origpublisher` and `origyear` printed or not; the standard is `'true'`. If you use the option and the field `origlocation` is set, the “orig” fields will be printed. In this case, the fields `location`, `publisher` and `year` are appended in parentheses, precluded by the bibstring reprint. Note that the fields `publisher` and `origpublisher` are only printed, if the option `nopublisher=false` is given. Note also that the `edition` field applies to the original edition, as reprints are normally not released in more than one edition, but re-issue a specific edition. If the option `edsuper` is used, the edition is printed as superscript number ahead of `origyear`.
- With the option `origfieldsformat`, which can take the values `'parens'`, `'brackets'` and `'punct'`, you can set the appearance of the reprint details (with `origfields=true`). The values `'parens'` and `'brackets'` put them in parentheses or brackets, respectively. The default is `'punct'`; this



means that the reprint details are introduced by the punctuation command `\origfieldspunct`, which is preset to a comma.

- The fields ISBN/ISSN and DOI are not printed, even if they are set.
- The fields `series` and `number` are put in parentheses.
- The punctuation before `titleaddon`, `booktitleaddon` and `main-titleaddon` is controlled by the new command `\titleaddonpunct`. The default is a period.

- The option `edsuper` is introduced. If it is set to `'true'`, the edition is printed as superscript number (not as ordinal number) straight ahead of the year. The default value for this option is `'false'`.

Note that this works only, if you have integers in the field `edition`, and nothing but integers. Information like “5th, revised and expanded edition” in the `edition` field will be printed as usual, not as a superscript number. Additionally, a warning will appear. If you would like to use the option `edsuper` for one of your documents, you should ensure that you put only integers into the `edition` field and use the field note for more detailed information on editions.

- The option `editorstring` is introduced. It can take the values `'parens'`, `'brackets'` and `'normal'`; the default is `'parens'`. This option sets the string “editor” (abbreviated “ed.”) in parentheses or in brackets. If you set the option to `'normal'` (or, in fact, any value *except* `'parens'` and `'brackets'`), the editor string is not surrounded by parentheses or brackets. Instead, a comma is added after the editor’s name.
- If the `volume` field is not present for a journal, the year is *not* printed in parenthesis: “Journal name 2008”.
- With `journumafteryear=true`, the number of a journal is printed after the year and introduced by the bibstring “number”: “Journal name 28 (2008), no. 2”. If set to `'false'`, the standard behaviour is restored, but you can configure the separator between `volume` and `number` with the new command `\jourvolnumsep` (default: `\adddot`). The default for `journumafteryear` is `'true'`.
- The option `annotation` is introduced. If it is set to `'true'`, the field `annotation` will be printed in *small italic* typeface at the end of the entry. The default value for this option is `'false'`. You can alter the appearance by redefining the following command:  

```
\renewcommand{\annotationfont}{\small\itshape}
```
- The option `library` is introduced. If it is set to `'true'`, the field `library` will be printed in small sans serif typeface at the end of the entry. The



default value for this option is ‘false’. You can alter the appearance by redefining the following command:

```
\renewcommand{\libraryfont}{\small\sffamily}
```

- If both `annotation` and `library` are set to ‘true’, the contents of the annotation field is placed before the contents of the `library` field.

### 3.2 Appearance in citations

- Immediately repeated citations are replaced by the string “ibidem” unless the citation is the first one on the current page.
- In citations of the same author/editor as the immediately preceding citation the name is replaced by the string “idem” unless the citation is the first one on the current page. This feature is controlled by the option `idem` which can be set to ‘true’ or ‘false’; the default value is ‘true’.
- If you set the option `ibidtracker=false`, immediately repeated citations are no longer replaced by the string “ibidem”, but the “idem” functionality of this style is still active as long as you do not set the option `idem=false`.
- The option `shorthandibid` controls whether immediately repeated citations with a shorthand should also be replaced by the string “ibidem” or not. Possible values are ‘true’ and ‘false’, the default value is ‘true’. Note that this option has no effect if you set the option `ibidtracker=false`. Note also that this behaviour can be overridden for each entry by using `options={shorthandibid=true}` or `options={shorthandibid=false}`, respectively.
- If you use the `\textcite` command with an entry that lacks author and editor, biblatex will give you a warning and output the entry’s key in bold face.
- The option `firstfull` delivers a full citation for the first occurrence of an entry. The default value for this option is ‘false’.
- If a shorthand is given and the option `firstfull` is set to ‘true’, the addition “henceforth cited as ...” will be added to the citation. This behaviour can be influenced by the option `citedas`, which can take the values ‘true’ or ‘false’; the default is ‘true’. Note that this behaviour can also be overridden for each entry by using `options={citedas=true}` or `options={citedas=false}`, respectively.

- If you specify pages to a `\fullcite` (or the first citation with the option `firstfull`) of an entry which has the field `pages` defined, the pages of the citation will be precluded by the term “here”. This behaviour can be influenced by the option `herename`, which can take the values ‘true’ or ‘false’; the standard value is ‘true’. The term can be redefined in the preamble by the following command, e.g. in order to have a colon after “here”:

```
\DefineBibliographyStrings{german}{%
  herename = {here\addcolon\space}
}
```

- The option `firstfullname=true` offers the possibility to have authors/editors printed with first name and last name for the first citation when using the commands `\citeauthor` or `\textcite`; only when they are cited for the second time, the last name is printed on its own. This works also with different citations from the same author such as the full name is only given with the first citation. It does not matter, if you only use `\citeauthor` or `\textcite` or both. The standard for this option is ‘false’ (i.e. only the last names are printed).

### 3.3 List of Shorthands

- The list of shorthands contains only author (or editor), title and, if necessary, booktitle or maintitle. This information should be sufficient in order to find the full bibliographical data in the bibliography. This feature is controlled by the option `terselos` which can be set to ‘true’ or ‘false’; the default value is ‘true’.
- Using the option `shorthandwidth`, you can define the width of the labels in the list of shorthands. This is especially useful when you have very long shorthands. The option can take any length definition, for example ‘40pt’ or ‘3em’. If you use the option `shorthandwidth`, the spacing after the label is reduced and a colon is inserted after every label. The punctuation mark can be redefined with the command `\shorthandpunct` and the spacing is assigned by the new length `\shorthandsep`. The standard values (as soon as `shorthandwidth` is used) are:

```
\renewcommand{\shorthandpunct}{\addcolon}
\setlength{\shorthandsep}{3pt plus 0.5pt minus 0.5pt}
```



## 4 The “footnote-dw” style

This style is similar to `verbose-inote`. It is based on the “`authortitle-dw`” style with the following differences:

- Citations are *only* possible inside footnotes. Citations which are not inside footnotes will automatically be turned into a `\footcite`.
- The first citation will give a full reference, following citations will only use `author` and `shorttitle` (or `title`, if no `shorttitle` is given) with the addition “see n. ‘N’”, where “N” is the number of the footnote where the first citation occurred.
- When using `\parencite` outside a footnote, the parentheses will be dropped and a `\footcite` will be used instead. Inside footnotes, the `\parencite` command will work as expected. The addition “see n. ...” will be surrounded by brackets instead of parentheses.
- The `\textcite` command is not defined and will be replaced by a `\cite` command.
- If one or both of the options `annotation` and `library` are set to ‘`true`’, the annotations and library information are only printed in the bibliography (if there is one), but not in the first citations and in the list of shorthands.
- The option `herename` is valid for full citations (`\fullcite`) as well as for the first citation of an entry.
- All other options defined in “`authortitle-dw`” can also be used with “`footnote-dw`”. The only exception is the option `firstfull`.

## 5 Crossref functionality

### 5.1 How it works

The crossref functionality of `biblatex-dw` provides a possibility for dependent papers to refer to a parent entry. In order to use it, you have to create a parent entry of the type `@book`, `@collection` or `@proceedings`. Each child entry belonging to this parent entry can refer to its `BIBTEX` key using the field `xref`. This works for entries of the type `@inbook`, `@incollection` and `@inproceedings`.

Here is a small example:

```
@collection{parent,
  editor = {Editor},
```

```

    title = {Book Title},
    location = {Location},
    year = {2008}
  }
  @incollection{child,
    author = {Author},
    title = {Title of the Contribution},
    xref = {parent}% reference
  }

```

When an `@incollection` entry is cited and the option `xref` is set to `'true'`, the cited entry takes data of the entry with the `BIBTEX` key `parent`. If it is available, the shorthand is used. Otherwise, the fields `author/editor` and `title` (or `shorttitle`, if available) are printed. Thus, the reader is referred to the corresponding parent entry in the bibliography and in this way is provided with all relevant data.

With multiple child entries, it would be possible to have the data entered only once (and thus, also the possibility to have typos would be reduced). But you have to keep in mind that you then *always* have to use this crossref mechanism. If you need a document with all data in every single entry, the corresponding information (`editor`, `booktitle` etc.) would be missing. It is therefore better to enter all relevant data for `@incollection`, `@inbook` and `@inproceedings` entries including the `BIBTEX` key of the parent entry in the `xref` field.

The behaviour of the `xref` field is affected by the package option `mincrossrefs`, which has the default setting `'2'`. That means, if only one article of a collection is cited, the collection would not be included in the bibliography (if it is not cited explicitly) and thus the article would be incomplete. For that reason, the option `mincrossrefs` is set to `'1'` when using `xref=true`.

The default setting does not use this crossref functionality. You can also switch it off with `xref=false`. In both cases, the `xref` field takes effect only insofar as the parent entry is only included in the bibliography if at least two of his child entries are cited (`mincrossrefs=2`). You can of course set the value for `mincrossrefs` to whatever you want or need.

The reference only works with the field `xref`. The field `crossref` does *not* work together with this crossref functionality! Instead of simply copying the missing fields from the parent entry into the child entry, as it is done in standard `BIBTEX` and its `crossref` method, the crossref functionality presented here uses a special citation which provides the relevant data of the parent entry.



## 5.2 Features

### 5.2.1 “footnote-dw” specifics

The crossref functionality also works with “footnote-dw”. When using the option `xref=true`, citing the parent entry for the first time sets a `\label` for the parent entry. It does not matter if the parent entry is cited itself or via a child entry. When a (second) child entry is cited, a short citation of the parent entry is given along with a reference to the footnote of the first citation in which the parent entry appeared.

### 5.2.2 Multi-volume “parents”

If a parent entry is a multi-volume work, the child entry normally refers to a specific volume of the parent entry, not to the entire work. In order to take that into account, biblatex-dw checks if the `volume` field is given in the child entry. If so, it checks if the parent entry has a `volume`, too. Only if the parent entry has no `volume` specified, the `volume` of the child entry is printed immediately before the pages.<sup>1</sup> In this case, it will also be checked if the data in the `year` field match. If they don’t match (e.g. when the multi-volume work was published in several years), the `year` will be printed additionally. Moreover, it will finally be checked if the data in the `location` (or `address`) match. If they don’t match (e.g. when the multi-volume work was published at different places, but the single volume referred to by the child entry was published only at one place), the `location` will be printed immediately before the `year`.

## 6 Survey of options

### 6.1 Global options

The value in parentheses shows the default.

`annotation` (false)

The field `annotation` is printed at the end of the bibliography item.

`citedas` (true)

The first citation (in “`authortitle-dw`” only if the option `firstfull` is

<sup>1</sup> The reason why it is not checked if the content of both `volume` fields are the same is the following: As soon as the `volume` field of the parent entry is given, it represents a single volume of a multi-volume work. If we now have a child entry with a different `volume`, it can be considered as a fault. At least no scenario came to my mind where a child entry needs a different volume as the corresponding parent entry.

used) is followed by the string “henceforth cited as” whenever a shorthand is given.

- edbeforetitle** (false)  
When set to ‘true’, the editor in @incollection and @inproceedings entries will be typeset before the booktitle (“... in: *Editor* (ed.): *Booktitle* ...”) rather than afterwards (“... in: *Booktitle*, ed. by *Editor* ...”).
- edbyidem** (true)  
“ed. by idem” instead of “ed. by *Editor*”.
- editorstring** (parens)  
Sets the editor string in parentheses (‘parens’) or brackets (‘brackets’). If set to ‘normal’, the editor string is put after the editor’s name and preceded by a comma.
- edsuper** (false)  
The edition is printed as superscript number straight ahead of the year.
- firstfull** (false) “*authortitle-dw*” only  
The first citation is printed with full reference.
- firstfullname** (false)  
At the first citation with \citeauthor or \textcite (with footnote-dw: \citeauthor only) the full name is printed, at all subsequent citations only the last name is printed.
- firstnamefont** (normal)  
Specifies the font shape of the first names of authors and editors as well as of name affixes and (if useprefix is set to ‘false’) of name prefixes. Possible values are ‘smallcaps’, ‘italic’, ‘bold’ and ‘normal’ (which is the default and means that the normal font shape is used).
- herename** (true)  
Specifies if the term “here” should prelude the pages of a fullcite or of the first citation (“*authortitle-dw*”: only with option **firstfull**) of an entry which has a non-empty pages-field.
- idem** (true)  
In immediately repeated citations of the same author, the author’s name is replaced by “idem”.
- idembib** (true)  
“Idem” or “—” instead of names for the same authors/editors of subsequent entries in the bibliography.

- idembibformat** (idem)  
Only for `idembib=true`: With ‘`idem`’ the names are substituted by “Idem”, with ‘`dash`’ they are substituted by a – well – dash (“–”).
- journumafteryear** (true)  
The number of a journal is printed after the year and introduced by the bibstring “number” (“no.”).
- library** (false)  
The field `library` is printed at the end of the bibliography item.
- namefont** (normal)  
Specifies the font shape of the last names of authors and editors as well as of name prefixes (if `useprefix` is set to ‘`true`’). Possible values are ‘`smallcaps`’, ‘`italic`’, ‘`bold`’ and ‘`normal`’ (which is the default and means that the normal font shape is used).
- nopublisher** (true)  
The publisher is not printed.
- nolocation** (false)  
If set to ‘`true`’, the location is not printed. In this case, the publisher is omitted, too, even if `nopublisher` is set to ‘`false`’.
- oldauthor** (true)  
If set to ‘`false`’, the entry option `oldauthor` is ignored.
- origfields** (true)  
With `origfields=true`, the fields `origlocation` and `origyear` (as well as `origpublisher`, if `nopublisher=false` is given) are printed.
- origfieldsformat** (punct)  
Specifies the appearance of the reprint details (with `origfields=true`): in parentheses, in brackets, or introduced by `\origfieldspunct` (preset to a comma).
- shorthandibid** (true)  
Immediately repeated citations of entries with `shorthand` are replaced by “`ibid.`”
- shorthandwidth** *no default*  
Defines the width of the label in the list of shorthands. Additionally, after every label the length `\shorthandsep` (the default is 3pt) and the command `\shorthandpunct` (the default is a colon) are executed.
- terselos** (true)  
A terse version of the list of shorthands is used.
- xref** (false)  
The crossref functionality is used. See section 5 on page 7 for details.

## 6.2 Entry options

- citedas** The string “henceforth cited as” in first citations (“authortitle-dw”: with option **firstfull** only) of entries with a shorthand is enforced (**‘true’**) or suppressed (**‘false’**).
- oldauthor** The author is not set in the font shape chosen by **namefont**.
- shorthandibid** Independent of the global option **shorthandibid**, the shorthand of this entry is replaced by “ibidem” (**‘true’**) or is not replaced (**‘false’**).

## 7 Further customization

Advanced users can of course further customize the styles beyond the options that biblatex-dw provides. I will give some hints in the following.

### Delimiter between names

Other than biblatex, biblatex-dw distinguishes between delimiters that are used in citations and delimiters that are used in the bibliography. biblatex has only `\multinamedelim` (between multiple authors), `\finalnamedelim` (before the last author) and `\revsdnamedelim` (additional character(s) in “Lastname, Firstname| and Firstname2 Lastname2”: the | indicates the place for the `\revsdnamedelim`).

biblatex-dw, however, has `\bibmultinamedelim`, `\bibfinalnamedelim` and `\bibrevsdnamedelim` for the bibliography as well as `\citemultinamedelim`, `\citefinalnamedelim` and `\citerevsdnamedelim` for the citations. Thus, you can achieve different results. The standard definitions are as follows:

```
\newcommand*\bibmultinamedelim{\addcomma\space}
\newcommand*\bibfinalnamedelim{%
  \ifnum\value{liststop}>2 \finalandcomma\fi
  \addspace\bibstring{and}\space}%
\newcommand*\bibrevsdnamedelim{\addspace}

\newcommand*\citemultinamedelim{/}
\newcommand*\citefinalnamedelim{/}
\newcommand*\citerevsdnamedelim{/}
```

When you have multiple authors, they are separated by a slash (/) in citations, but by comma or (before the last author) by “and” in the bibliography. You can change these definitions with `\renewcommand`.