Citations and the bibliography

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1   The basics

- LaTeX comes with built-in support for citing references from a bibliography. This is done by using the `\cite{`*`cite_key`*`}` command at the place in the text where the citation is supposed to occur.

- The *`cite_key`* is the unique (often mnemonic) identifier of a particular reference listed in the bibliography.

- There are two ways to put together a bibliography:

  1. In-document bibliography using the environment `thebibliography`
  2. External bibliography using BibTeX

- Additionally, there are many ways to modify the in-text citations using a variety of `\cite{...}` commands that come with the `natbib` package

- This package also enables author-year style citations instead of LaTeX's native numerical citations (e.g. as used in the natural sciences).

- But first things first ...

2   The in-document bibliography

- The in-document bibliography is an evironment like the itemization or enumeration environments. Hence, it is invoked by[1]

```
\begin{thebibliography}{99}
   ...
\end{thebibliography}
```

- It creates its own unnumbered section heading "References" (or "Literatur" depending on the document's language) in the usual style specified for section headings in the document.

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[1]The number 99 sets the width of the numerical label of the single reference entries in numerical citation styles to two digits (because 99 itself has two digits, 57 would have worked in the same way). Since linguistics makes use of the author-year citation style, this parameter will not play a role here.

- An entry in the bibliography is created by using the command
  `\bibitem[`*`ShortName(Year)LongName`*`]{`*`cite_key`*`}`. Hence

  ```
  \bibitem[Adger(2003)Adger]{adger2003}
  Adger, David (2003). \textit{Core Syntax: A Minimalist Approach}.
  Oxford University Press, New York.
  ```

  will output the following in the References section

  Adger, David (2003). *Core Syntax: A Minimalist Approach.* Oxford University Press, New York.

- All in all, a very short bibliography consisting of only three entries might be typed in as

  ```
  \begin{thebibliography}{99}
    \bibitem[Adger(2003)Adger]{adger2003}
    Adger, David (2003). \textit{Core Syntax: A Minimalist Approach}.
    Oxford University Press, New York.

    \bibitem[Embick{\&}Marantz(2008)Embick,Marantz]{embick+marantz2008}
    Embick, David {\&} Alec Marantz (2008). Architecture and Blocking.
    \textit{Linguistic Inquiry 39}, 1--53.

    \bibitem[Haupt~et~al.(2014)Haupt,Schnorr,Poetsch,Mansel,Handke,Kersting]
    {haupt-et-al2014}
    Haupt, Sebastian, Ren\'e Schnorr, Maria Poetsch, Alexander Mansel,
    Marcel Handke {\&} Berthold Kersting (2014). Extraction properties
    of 25,27-bis(carbonylmethoxy)calix[4]arenes towards Sr$^{2+}$:
    competitive extraction in a synthetic groundwater. \textit{Journal
    of Radioanalytical and Nuclear Chemistry 300}, 779--786.
  \end{thebibliography}
  ```

  which will output

  ### References

  Adger, David (2003). *Core Syntax: A Minimalist Approach.* Oxford University Press, Oxford.

  Embick, David & Alec Marantz (2008). Architecture and Blocking. *Linguistic Inquiry 39*, 1–53.

  Haupt, Sebastian, René Schnorr, Maria Poetsch, Alexander Mansel, Marcel Handke & Berthold Kersting (2014). Extraction properties of 25,27-bis(carbonylmethoxy)calix[4]-arenes towards Sr^{2+}: competitive extraction in a synthetic groundwater. *Journal of Radioanalytical and Nuclear Chemistry 300*, 779–786.

- However, the entries will not be ordered alphabetically unless you do it by hand and the formatting of every entry has to be done by hand too. Plus this way of creating a bibliography involves lots of typing for each and every document you write, even if you cite the very same literature over and over again. Fortunately, there is a much easier way to create and manage your bibliography and have all the entries formatted the same way. . .

3 The external bibliography with BibTeX

- Basically, BibTeX allows you to store all your bibliographical information in one central place: the `.bib` file.

- This file consists of all your reference entries. Every entry starts with the declaration of the reference type (e.g. *article, book, inproceedings,* etc.) and the cite key. The specific information of each reference is assigned to certain data fields within its entry (e.g. *title, author, year, publisher, journal,* etc.). An entry for an article might look like this

  ```
  @Article{embick+marantz2008,
    Title                   = {Architecture and Blocking},
    Author                  = {David Embick and Alec Marantz},
    Journal                 = {Linguistic Inquiry},
    Year                    = {2008},
    Pages                   = {1-53},
    Volume                  = {39}
  }
  ```

- In your LaTeX document you just specify the name of the `.bib` file and the formatting style. If you wanted to use your `lingu.bib` file and have the references formatted according to the American Psychologists Association you would type

`\bibliography{lingu}`	(**Note**: Do not put `.bib` in the brackets.)
`\bibliographystyle{newapa}`	(More on the different bibliography styles below.)

- Both the `.bib` file and the bibliography style file (which has the extension `.bst`) need to be in the same folder as the `.tex` document you're compiling. This is quite inconvenient if you want to use the same library of references for all your written work in linguistics[2]. Therefore you can also put the files in a place where they're accessible for all LaTeX documents: the bibtex subdirectory of your local `texmf` directory. If you're using TeX Live on Windows this can be found here: `C:\texlive\texmf-local\bibtex`; if you're working on a Mac: `~/Library/texmf/bibtex` (if it doesn't exist, create it!). You'll have to put your `.bib` file into the folder `bib` and your `.bst` file into the folder `bst` which are both subfolders of the above mentioned `bibtex` folder.

- After compiling your document once with LaTeX you have to run BibTeX. This will look up all the references that you cited using `\cite{...}` in your document, extract the relevant information from your `.bib` file and write it into a `.bbl` file that is named like your document. This `.bbl` file is basically the classic `thebibliography` environment outsourced into its very own file with alphabetical ordering and all the formatting done according to the bibliography style. After this you need to run LaTeX twice to get nice and proper citations and a beautiful bibliography. In TeXstudio, clicking the *Build & View* button will do all the work for you. The same three references as above will now be output as

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[2]which you want to do because you don't want to go through the hassle of typing in the same often cited literature for every single paper you write

References

Adger, D. (2003). *Core Syntax: A Minimalist Approach.* New York: Oxford University Press.

Embick, D. & Marantz, A. (2008). Architecture and blocking. *Linguistic Inquiry, 39*, 1–53.

Haupt, S., Schnorr, R., Poetsch, M., Mansel, A., Handke, M., & Kersting, B. (2014). Extraction properties of 25,27-bis(carbonylmethoxy)calix[4]arenes towards sr^{2+}: competitive extraction in a synthetic groundwater. *Journal of Radioanalytical and Nuclear Chemistry, 300*, 779–786.

- Quite a lot of bibliography styles come shipped with *TeX Live* and `natbib` some of which are mentioned and described in the `natbib` package documentation (`https://www.ctan.org/pkg/natbib`)[3]. Also, some journals and publishers offer a `.bst` file for download, just google! For example, there is a style file for formatting references like in *Linguistic Inquiry* called `linquiry2` that can be found through Google. A few styles can be found here: `http://kinglab.eeb.lsa.umich.edu/pub/biblios/bst/`. With some more experience and effort you can also build your own style using the `makebst` program of the `custom-bib` package (`http://www.ctan.org/tex-archive/macros/latex/contrib/custom-bib/`).

  Note: All bibliography styles that you add manually should be placed in `C:\texlive\texmf-local\bibtex\bst` (on Windows) and `~/Library/texmf/bibtex/bst` (on Mac).

- The nice thing about using BIBTEX is that you don't have to code the `.bib` file directly. There are a bunch of user friendly programs out there that help you create and maintain your `.bib` file, link PDFs to specific entries, search for duplicates in your cite keys, etc. A very well-known commercial bibliography manager is *Citavi* (`http://www.citavi.ch/en/index.html`). One of the free ones is the easy to handle yet powerful program *JabRef* (`http://jabref.sourceforge.net/`).

  Note: Some bibliography styles force all words of a book or article title (apart from the first one) to be lower case. If you want the upper case of certain letters preserved you need to put them into curly brackets in their entry in the `.bib` file. Also, you have to input special symbols such as umlauts with their respective LATEX code. Thus, for example ö and å need to be input as `\"o` and `\aa`.

4 Citing with the natbib package

- The following commands only work if the `natbib` package is loaded. This is done by putting the following in the preamble:

  `\usepackage[options]{natbib}`

  Some options you might want to use are

  - *longnamesfirst*: all authors of a reference are listed in the first citation, following citations list only the first author plus *et al.*
  - *sort*: multiple citations are ordered into the sequence in that they appear in the list of references (i.e. for most cases this is an alphabetical order).

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[3]You can also have a look at your LATEX distribution to find out which styles are preinstalled. On Windows: `C:\texlive\2014\texmf-dist\bibtex\bst`; on Mac: /usr/local/texlive/2014/texmf-dist/bibtex/bst

Others can be found in the package documentation.

- **The basic citation commands** are `\citet{...}` for textual and `\citep{...}` for parenthetical citations. (Instead of `\citet` you may also use simple `\cite`.) They all also take two optional arguments: the first is for text that needs to appear before the actual citation, the second is for text that should show up after it. If only one oprional argument is specified it is interpreted as if it were the second. Here's an overview of what each citation command's output looks like:

`\citet{ba+jo+ro1989}`	→	Baker et al. (1989)
`\citet[sec. 2]{ba+jo+ro1989}`	→	Baker et al. (1989, sec. 2)
`\citep{ba+jo+ro1989}`	→	(Baker et al., 1989)
`\citep[sec. 2]{ba+jo+ro1989}`	→	(Baker et al., 1989, sec. 2)
`\citep[see][]{ba+jo+ro1989}`	→	(see Baker et al., 1989)
`\citep[see][sec. 2]{ba+jo+ro1989}`	→	(see Baker et al., 1989, sec. 2)
`\citet*{ba+jo+ro1989}`	→	Baker, Johnson, and Roberts (1989)
`\citep*{ba+jo+ro1989}`	→	(Baker, Johnson, and Roberts, 1989)

- **Multiple citations** don't require multiple `\cite` commands. Instead, all cite keys can be put into one single `\cite` command separated by commas. If you put multiple citations of the same author(s), LATEX conflates them into one. Also, multiple same author citations of the same year are alphabetically distinguished.

`\citet{adger2007:LI,steriade1982}`	→	Adger (2007a); Steriade (1982)
`\citep{adger2007:LI,steriade1982}`	→	(Adger, 2007a; Steriade, 1982)
`\citep{adger2003,adger2007:LI}`	→	(Adger, 2003, 2007a)
`\citep{adger2007:LI,adger2007:LA}`	→	(Adger, 2007a,b)

- **Citations without parentheses** are achieved using `\citealt` and `\citealp`.

`\citealt{ba+jo+ro1989}`	→	Baker et al. 1989
`\citealt*{ba+jo+ro1989}`	→	Baker, Johnson, and Roberts 1989
`\citealp{ba+jo+ro1989}`	→	Baker et al., 1989
`\citealp*{ba+jo+ro1989}`	→	Baker, Johnson, and Roberts, 1989
`\citealp{ba+jo+ro1989,adger2003}`	→	Adger, 2003; Baker et al., 1989
`\citealp[pg. 32]{ba+jo+ro1989}`	→	Baker et al., 1989, pg. 32

- **Citing only the author or only the year** of a particular reference is possible with `\citeauthor` and `\citeyear`.

`\citeauthor{ba+jo+ro1989}`	→	Baker et al.
`\citeauthor*{ba+jo+ro1989}`	→	Baker, Johnson, and Roberts
`\citeyear{ba+jo+ro1989}`	→	1989
`\citeyearpar{ba+jo+ro1989}`	→	(1989)

- **Including a non-cited reference in the bibliography** is actually bad scientific practice: only the references that you cite in the document should appear in the bibliography. However, there is a command that allows you to list a reference in the bibliography even if it is not cited. The command `\nocite{...}` adds the nocited reference to the bibliography but doesn't print any citation in the text.

5 Punctuation, spacing, and other stuff

- You can change the punctuation of citations using the command
  `\bibpunct[optional]{1}{2}{3}{4}{5}{6}` where

     1 is the opening bracket symbol; default: (

     2 is the closing bracket symbol; default:)

     3 is the punctuation between multiple citations; default: ;

     4 is a letter: 'n' for numerical style, 's' for numerical superscript style, any other letter for author-year; default: author-year

     5 is the punctuation that comes between the author names and the year in parenthetical citations; default: ,

     6 is the punctuation between years of same author citations; default: ,

     – the optional argument specifies the character before a postnote (i.e. the text of the second optional argument of a `\cite` command)

`\bibpunct[: ]{[}{]}{,}{a}{ --}{/}` would make the output of the following command
`\citep[p. 12]{adger2007:LI,adger2007:LA,steriade1982}` look like
[Adger – 2007a/b, Steriade – 1982: p. 12]
The new punctuation is applied to all citations following the command.

- Whether '&' or 'and' is used between two author names in two-author citations depends on the chosen bibliography style. Changing it by hand is possible but also depends somewhat on the style used. This would take us too far here. If you're desperate to change it, Google is your best friend!

- Usually there is a distance of one line between the entries in the bibliography. If you want to save space (or increase the distance) you can reset the value for `\bibsep`. Thus `\setlength{\bibsep}{0pt}` will output a bibliography like this

  References

  Adger, D. (2003). *Core Syntax: A Minimalist Approach.* New York: Oxford University Press.
  Embick, D. & Marantz, A. (2008). Architecture and blocking. *Linguistic Inquiry, 39*, 1–53.
  Haupt, S., Schnorr, R., Poetsch, M., Mansel, A., Handke, M., & Kersting, B. (2014). Extraction properties of 25,27-bis(carbonylmethoxy)calix[4]arenes towards sr^{2+}: competitive extraction in a synthetic groundwater. *Journal of Radioanalytical and Nuclear Chemistry, 300*, 779–786.

- If you want to include some text after the 'References' heading but before the first entry, redefine `\bibpreamble` like this:
  `\renewcommand{\bibpreamble}{Your text goes here}`.

- You can also change the title of the bibliography using
  `\renewcommand{\refname}{Your bibliography title}`
  (For certain other document classes you need to put `\bibname` instead of `\refname`.)

- A good overview and some more information can also be found here: `http://merkel.zoneo.net/Latex/natbib.php`.

References

In contrast to the bibliography examples above, I used the style `linquiry2` instead of `newapa` for this one. Also, I set `\bibsep` to 0.3`\baselineskip`

Adger, David. 2003. *Core syntax: A minimalist approach.* New York: Oxford University Press.

Adger, David. 2007a. Pronouns postpone at PF. *Linguistic Inquiry* 38:343–349.

Adger, David. 2007b. Stress and phrasal syntax. *Linguistic Analysis* 33:238–266.

Baker, Mark, Kyle Johnson, and Ian Roberts. 1989. Passive arguments raised. *Linguistic Inquiry* 20:219–251.

Haupt, Sebastian, René Schnorr, Maria Poetsch, Alexander Mansel, Marcel Handke, and Berthold Kersting. 2014. Extraction properties of 25,27-bis(carbonylmethoxy)calix[4]arenes towards Sr^{2+}: competitive extraction in a synthetic groundwater. *Journal of Radioanalytical and Nuclear Chemistry* 300:779–786.

Steriade, Donca. 1982. Greek prosodies and the nature of syllabification. Doctoral Dissertation, MIT, Cambridge, Mass.