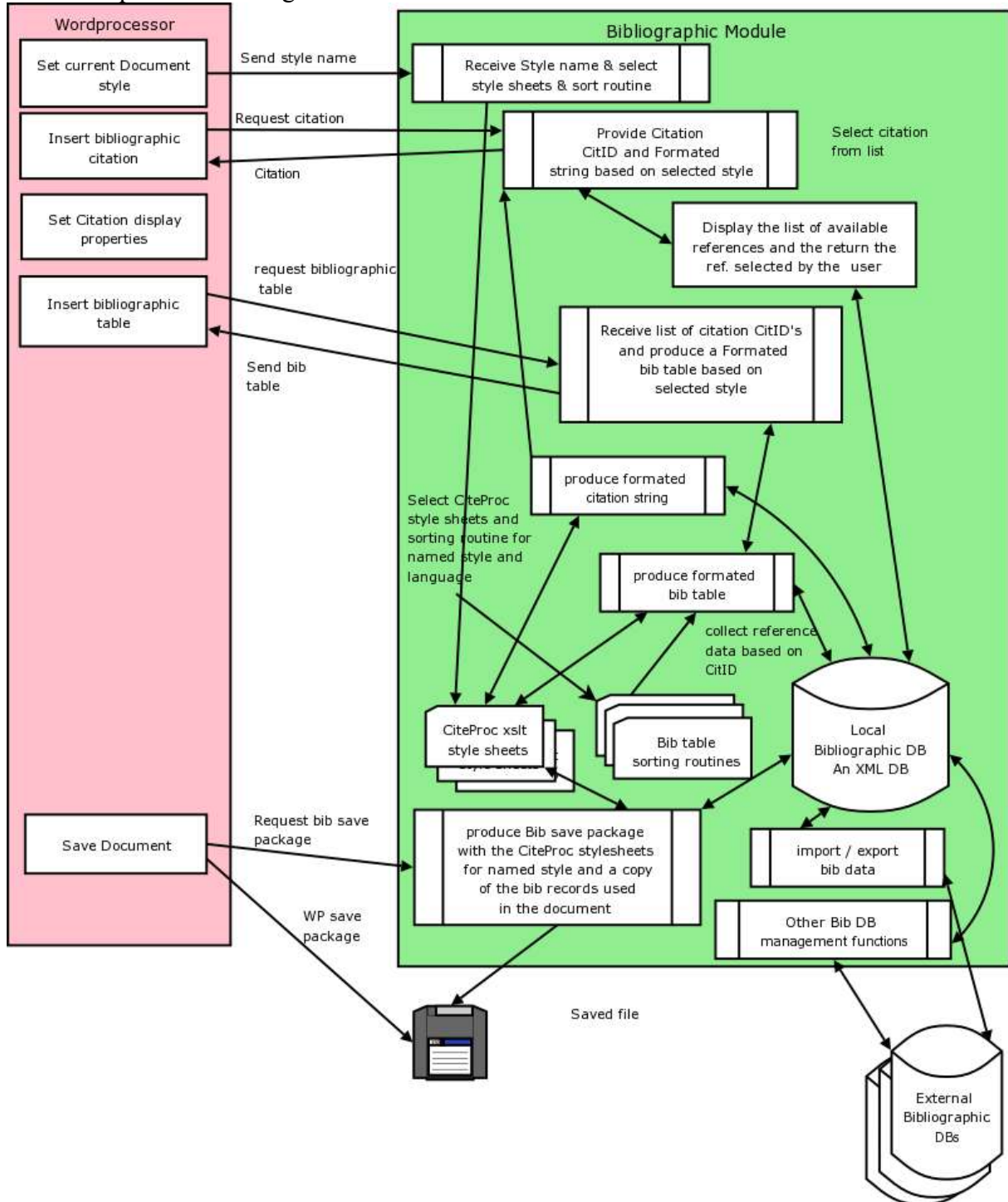# Word processor requirements for Bibliographic Support

Word processor interaction with the proposed Bibliographic module.

It would be useful if the OpenOffice bibliographic module was replaceable and plug-in. This would allow the easier development of alternative bibliographic modules and the use of commercial and opensource bibliographic packages with OpenOffice. To this end I have tried to sketch out the interaction required in the diagram below.

Wordprocessor

- Set current Document style
- Insert bibliographic citation
- Set Citation display properties
- Insert bibliographic table
- Save Document

Bibliographic Module

- Send style name
- Request citation
- Citation
- request bibliographic table
- Send bib table
- Request bib save package
- WP save package

- Receive Style name & select style sheets & sort routine
- Provide Citation CitID and Formated string based on selected style — Select citation from list
- Display the list of available references and the return the ref. selected by the user
- Receive list of citation CitID's and produce a Formated bib table based on selected style
- produce formated citation string
- produce formated bib table
- Select CiteProc style sheets and sorting routine for named style and language
- collect reference data based on CitID
- CiteProc xslt style sheets
- Bib table sorting routines
- Local Bibliographic DB An XML DB
- produce Bib save package with the CiteProc stylesheets for named style and a copy of the bib records used in the document
- import / export bib data
- Other Bib DB management functions
- Saved file
- External Bibliographic DBs

Note that many of the bibliographic functions such as bibliographic database management, data import/export, data entry, internet query etc. will be handled by the bibliographic module, and the

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only support required by the word processor would be the provision of menu selection for these functions. Also note that the 'Insert Citation' function should be able to be triggered by the Drag-and-Drop of a bibliographic reference into a document.

Word processor enhancements requirements for Bibliographic Support

1. There needs to be support for Document Style selection, saving and loading. The current facilities support only one document style. Document style selection should apply to the whole document. Some styles such as MLA's Research Paper defines line spacing, margins and headings etc and these settings should be supported as well. Also there are options within styles. For example, an other bibliographic software package provides the following options for *The MLA Handbook* version 4 -

- Document Type-
  - Article (Non-anonymous Review)
  - Article (Masked/Anonymous Review)
  - Chapter in Manuscript At [ ] (number)
  - Chapter in Dissertation/Thesis At [ ] (number)
  - Student research Paper

- Heading Numbering System-
  - 1, 1.1, 1.3, etc.
  - Level 1 always A; Level 2 always B (in 1st edition)
  - Level 1 is [1] [2]; Level 2 is 1.1 (in 1st edition)

- Note types-
  - Footnote
  - Endnote

- Include elements-
  - Preliminary Text
  - Back Matter

2. The Document Style package would contain the following information
  - The Style full name, and version number.
  - The user selectable style options
  - Name of macro to set up document formating options (margins, headings etc,)
  - the bibliographic table sorting library name
  - The name of the xslt codesheets to produce -
    - In-text citations
    - Footnote initial citations
    - Footnote subsequent citations
    - Endnote initial citations
    - Endnote subsequent citations
    - Bibliographic table entries

3. Add a new Insert menu item 'Quotation'. This pastes the current clipboard item into the document and tags it with a bibliographic source using the same or similar dialog as Insert->Indexes and Tables->Bibliographic Entry->New. There should be a (user configurable) method of highlighting quotation text and objects, eg with color underlining of highlighting. It would have an appropriate context

menu. Quotation objects would have an option to display the attached citation or not according to the current style.

4. There would also be a new Indexes/Table type – 'Quotations'. Which would be very similar to the Bibliographic Table but would also have the object type as field ie. Text, graphic, chart, drawing etc.

5. Support needs to added for the footnote citation style (commonly used in the Humanities, and particularly in History) such as defined in the Chicago Manual of Style. Eg.

> 34. Thomas M. Charles-Edwards,"Honour and status in Some Irish and Welsh Prose Tales.", *Eriu*, xxxvi, 1978.

6. There needs to be provision for defining citations and references with different treatment for first and subsequent uses of the citation. There is a tedious and fault prone aspects of the footnote / endnote citation method - the maintenance the Initial and Subsequent citations in the correct order as one edits the text. It is not difficult when editing to move a piece of text and have as result the Initial Citation reference coming after the Subsequent reference.

7. Support for treating repeating footnote references such as the use of 'ibid'.

8. In designing the footnote citation support consideration needs to be take of the handling of other (non-bibliographic citation) text in the footnote, when the user changes the document style form footnote to in-text citation. In general the user text would remain in the footnote when the citation was moved to in-text. But the Insert->Bibliographic dialog would need to allow the user to tag or insert text what was to be a suffix of a prefix to the citation whatever citation method was selected. When this was used then, if no other text was in the footnote, then all the text would be moved in-text with the new citation format and the footnote deleted.

9. Chicago Manual of Style (and possible other style manuals) specify different formats for footnote and endnote citations and the bibliographic table (citation use Initials & Surname, Bibliography Table uses Surname & Initials). So we need to define formats for

- In-text citations
- Footnote initial citations
- Footnote subsequent citations
- Endnote initial citations
- Endnote subsequent citations
- Bibliographic table entries

10. There needs to be an option to place the document wide footnotes and endnotes an a user selectable location. Currently, for endnotes, there are only two options available at the end of the document or at the end of each section. For footnotes there are two options for Position='End of Page' or 'End Of Document'. A new option needs to be provided to allow for a user selectable location for both. Perhaps this could be implemented with a new option in Format->Sections to include an check box with "[] Place Document Endnotes at the end of this section" and "[] Place Document Footnotes at the end of this section". Only one section in each document should have each setting.

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The reason this needs to be made more flexible is that style manuals specify different locations. For example the formatting guidelines for APA and Chicago style submissions specify the following order for the sections in a document:

APA Style
        title page
        abstract
        text
        references
        appendixes
        author note
        footnotes/endnotes
        tables
        figure captions
        figures

Chicago Style (back matter)
        Appendix
        Endnotes / Footnotes
        Glossary
        Bibliography
        Index
        Colophon

Note: Whilst Bibliographic citations can be in-text, footnote or endnote types. The user should still be able to – when using footnote citations use endnotes as well and when using endnote citations use footnotes as well. To support this properly there should be provision for Footnote symbols. The Chicago Manual of Style stipulates that when Endnotes and Footnotes are both used, the Endnotes are consecutively numbered (1,2,3 ...) and the footnotes referenced by symbols. The symbol series they suggest are -

As more symbols are needed they are doubled and trebled -

11. Bibliographic table generation need to have special sorting rules, different styles and different languages will have different sorting rules. (this topic is well discussed in D. E. Knuth. *Sorting and Searching.*) An example of special sorting rules for names: how to sort 'Mujahid Usamah Bin Ladin' ; Bin Ladin is the family name but ' Bin ' is always ignored in sorting, and they name will be grouped in the 'L's.) Provision need to be made for selectable Bibliographic table sorting routines.

Another sorting issue - When sorting a list of references for an APA style paper, the references need to be sorted by (Author, Date) sequence, which is straightforward enough, but references without an identifiable author (such as a web page) need to be listed by the title of the article and alphabetized in the list accordingly.

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12. The data model used for the bibliographic database is based upon Dublin Core / BibTeX. This has several limitations, it only supports a few document types and does not properly support new media types. The MODS - Metadata Object Description Schema data model is preferable and new bibliographic module will be based upon it. Whilst necessary we will continue to populate the current bibliographic fields in the documents to provide a level of backwards compatibility.

13. The Insert-> Bibliographic Entry will need to provide for different citation options provided by the style. For example, one Style (I am not sure which but at a German University) requires the following – In quoting a document(book/journal/article etc.) without a page it looks like

"This method is very reliable (AUTHOR YEAR)"
or
"But AUTHOR (YEAR) showed that..."

If a page or some pages are quoted (direct or indirect) it must look like
"'This method is very reliable' (AUTHOR YEAR:12)"
f.e. "'This method is very reliable' (BASLER 2003:12)"
or
"'This method is very reliable' (BASLER 2003:12 ff.)"
or
"AUTHOR (YEAR:12) stated 'This method is very reliable.'"
f.e. "BASLER (2003:12) stated 'This method is very reliable.'"
or
"BASLER (2003:12 f.) concludes that this method is very reliable.'"

Some comments on that:
1. The AUTHOR(s) must be in small capitals (as every person everywhere in the text).
2. One author: "AUTHOR 2003" Two authors: "AUTHOR1 & AUTHOR2 2003" Three or more: "AUTHOR1 ET AL. 2003"

If there are more than one publication of an author in the same year it must look like:
"BASLER 2003a" and "BASLER 2003b" a.s.o.

To summaries, the citation options for this style are:

    [Author | Author & Author | Author et al.] **(**YEAR{x}:page {f. | ff.}**)**
    or
    ([Author | Author & Author | Author et al.] YEAR{x}:page {f. | ff.}**)**

Note: 'f.' means 'and the following page' and 'ff.' means 'and following pages'.