

## APA/MLA Templates for Academic Writing: Microsoft Word and OpenOffice.org

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Academic papers in the humanities and the social sciences are increasingly required to be formatted in Modern Language Association (MLA) and American Psychological Association (APA)<sup>1</sup> style, respectively. Here at the Department of English, we have chosen to make these guidelines mandatory for term papers, as well as graduation and Masters' theses. The guidelines include highly detailed instructions on a variety of formatting choices — choices that would require students to spend large amounts of time if they had to set them manually in their word processing software. This is why we opted for a more economical approach and offer them templates that include all the required style properties. What follows is a brief introduction to word processing templates in general and the Department's APA/MLA templates in particular.

### Separating content from presentation

Whenever formatting is required — and both the APA and MLA guidelines represent a large amount of formatting instructions — there are presentational choices that need to be applied in one way or another to plain, unformatted text. Bits, the basic informational units, are not available in differently formatted varieties.

Best current practice is Web page coding offers an easily accessible illustration of how the job can be done elegantly and efficiently. Until not so long ago, Web page authors used to stick formatting instructions right into their HTML, using the font tag and other devices to control the presentational aspects of their pages. This resulted in pages that were loaded down with repetitive, pointless markup, made the code almost impossible to parse by the human eye, increased the page weight, and imposed an extra work load whenever such documents were either to be re-designed or re-purposed for another medium. Today, such coding is happily becoming a thing of the past: Web page creators now write HTML that marks up the individual parts of a document for structure rather than presentation, i.e. for what they are rather than for what they should look like, and then assign formatting properties in a separate file coded in CSS (Cascading Style Sheet). This results in much leaner pages that load faster and are more easily altered at a later stage. The move from presentational to structural markup illustrates a simple principle of efficient content packaging: structure should be separated from presentation.

This principle holds good for any type of document preparation, including word processing. However, word processors with graphical user interfaces<sup>2</sup> have not been very good at keeping structure and presentation apart, and, in fact, were not designed to. As the interface hides the actual code from the writer's view, the *what you see is what you get* philosophy leads many writers to assume that *what you see is all there is*. Document structure is thus trumped by document presentation; what any element *is* becomes

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<sup>1</sup> While APA dominates the social sciences, including linguistics, MLA is preferred in the humanities. The authoritative guidelines are found in Gibaldi (1998) and American Psychological Association (2001). The Purdue University Online Writing Lab (2001) offers handy online summaries of both sets of guidelines in HTML, plain text and .PDF format.

<sup>2</sup> Microsoft Word, launched in 1983, was the first widely-used word processor for the IBM PC that used a graphical user interface to display presentational styles on the screen while editing. Earlier and now largely superseded word processors such as WordStar, followed the plain-text markup conventions established by text processing environments for print such as SGML, troff, and Tex/LaTeX, using a text-only display with markup codes directly inserted into the copy.

immaterial because what it *looks like* is all that seems to matter. As a consequence, word-processed documents written by naive authors tend to be cluttered with formatting, hard to re-format, and hard to re-purpose for other uses.

### MS Word templates

The word processing feature, unknown to many writers, that honors the principle of separation is, of course, the template. In MS Word, templates are known as .dot files; they are stored separately from the .doc files and can be applied to the latter, in which case they become integrated into the .doc file. By default, .doc files use the normal.dot file, a predefined set of formatting properties, but customized .dot files can be created and applied to any .doc file. Whether default or customized, the template contains the formats for hierarchically structured headings, paragraphs and several other elements. Customized templates, in addition, can contain any number of user-specified styles — for instance all the formatting properties required by either APA or MLA. Such styles then become available in a menu and can be assigned to any element with a single click. Documents prepared with templates are marked up for structure rather than presentation, they can therefore easily be reformatted and re-purposed for other uses.

We have created both APA and MLA templates for Word that contain all the relevant formats, pagination, page margins, etc. required by the guidelines, and put them on the English Department Web site<sup>3</sup> as publicly accessible, free downloads under a Creative Commons<sup>4</sup> license.

### Misgivings about MS Word

Proponents of free/open source software have long taken a dim view of the proprietary Word format. Richard M. Stallman (2002) writes:

because Microsoft changes the Word file format with each release, its users are locked into a system that compels them to buy each upgrade whether they want a change or not. They may even find, several years from now, that the Word documents they are writing this year can no longer be read with the version of Word they use then.

The lock-in issue addressed by Stallman points to MS Word's dubious status as an archival format: being binary, MS Word documents can only be handled by software specifically designed to handle them, and in the absence of such software the documents become unreadable, which may or may not lead to data loss in the future. Critics also observe that Word is a questionable choice as a data exchange format; some people don't use Word and therefore cannot access the data stored in such files<sup>5</sup>.

Both of these criticisms have, for the time being, lost their practical significance with the release of the OpenOffice.org suite of office applications. OpenOffice.org is open source software, available as free downloads for all of the most widely used operating systems, and it has near-perfect support for all of Microsoft's Office formats, including Word. This means that Microsoft Office formats have, in effect, become interoperable across all major platforms. OpenOffice.org is associated with Sun Microsystems, and

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<sup>3</sup> See <http://www.cc.mie-u.ac.jp/~lq20106/eg5000/templates/>

The download page contains instructions on how to use the templates. For those who find the stand-alone templates too hard to use, the page also offers ready-made formatted .doc files with the templates pre-applied. Either the templates or the formatted files can be used; they both perform the same functions. The stand-alone templates are more flexible, however, since they can also be applied to existing text files that were created without them.

<sup>4</sup> Creative Commons licenses allow for free sharing of work under non-encumbering copyright. See <http://www.creativecommons.org>

<sup>5</sup> A good rundown on Word's offenses is found in Jeff Goldberg (2004).

the recent settlement between Sun and Microsoft<sup>6</sup> makes it unlikely for Microsoft to challenge the current level of interoperability and attempt to curtail OpenOffice.org's support of Microsoft-owned file formats.

Microsoft seems to be hedging its bets for the future, however. It did release the XML schemas<sup>7</sup> of its Office products<sup>8</sup> in December 2003, thus ensuring future interoperability with other software at a technological level. Then the corporation turned around and sought patent protection for these schemas<sup>9</sup> in January 2004, thus potentially erecting a legal barrier to future interoperability.

Whatever the outcome of this development, there are ethical reasons why educators shouldn't enforce the use of proprietary software among their students. As we do not wish to endorse and perpetuate the quasi-monopolist's stranglehold on the market, we should welcome open-source alternatives to Microsoft's Office formats.

### OpenOffice.org templates

Amongst Microsoft's competitors in the office software market, OpenOffice.org<sup>10</sup> stands out. While Microsoft Office remains the market leader by a wide margin, the open source alternative is rapidly gaining a broad user base.<sup>11</sup>

OpenOffice.org deserves its growing popularity for both technological and practical reasons. The suite saves documents natively as zipped-up XML files that are open to inspection in any text editor: unlike Microsoft's XML output, it is not converted from another, proprietary format. Its XML schemas — unlike Microsoft's — also undergo a careful review and standardization process.<sup>12</sup> In practical terms, the suite has taken care from its earliest days to present a user interface that will instantly feel familiar to users of MS Office software, so a switch is accomplished without any effort.

The APA/MLA templates developed by the English Department for OpenOffice.org contain the same

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<sup>6</sup> In early April 2004, Sun Microsystems and Microsoft reached several agreements that settled their patent disputes. See Shankland (2004).

<sup>7</sup> XML is an open specification from which markup languages can be built. It combines the universality of SGML (Standardized General Markup Language) with HTML's ease of use and is widely seen as the future of interoperable data sharing. "Schemas" are purpose-built "dialects" of the language.

<sup>8</sup> See Becker (2003).

<sup>9</sup> See Becker (2004).

<sup>10</sup> OpenOffice.org is a suite of office applications available for Windows, Mac OS X and several Unix flavors, including Linux; it is distributed at no charge under open source licenses. Its main components are Writer (word processor), Calc (spreadsheet program), Draw (graphics editor) and Impress (presentation program). The suite can handle all MS Office file formats (Word, Excel, Powerpoint), exports to PDF and Macromedia Flash and offers, in its Japanese version, full support for Ichitaro files.

The suite started out in 1985 under the name StarOffice and was developed by the German software company StarDivision. Sun Microsystems bought StarDivision in 1999 and released StarOffice 5.2 in 2000 as a free download. Sun now charges for StarOffice (currently available as version 7) but founded OpenOffice.org in 2000, an open-source organization which both develops and localizes the suite and releases non-commercial versions to the public under its own name.

The OpenOffice.org Web site came online in October 2000 and made the source code available for download. OOo 1.0 was released on May 1, 2002 and OOo 1.1 on September 2, 2003. The current version, OOo 1.1.3, came out on October 4, 2004.

<sup>11</sup> In a recent report, cited in Loftus (2004), US-American consulting firm Computer Sciences Corp. finds that Microsoft dominates the office suite market with 95% of the overall share and more than 300 million users worldwide. However, the report notes that OpenOffice.org has secured 14% of the large enterprise office systems market, with over 16 million downloads worldwide and countless CD installations.

<sup>12</sup> Open Office 1.0 has been approved as an OASIS (Organization for the Advancement of Structured Information Standards) committee draft by the OASIS Open Office Technical Committee. The European Union recommended OpenOffice.org as the basis for standard file formats and document exchange, and, as Sun Technology Director and co-author of the XML specification Tim Bray (2004) announced recently, the Open Office XML format is likely to become an ISO (International Organization for Standardization) Standard.

styles as their MS Word counterparts and are functionally analogous. Using them instead of the MS templates should not present any additional difficulties.

### Conclusion

We have been using the APA/MLA templates in composition classes for some time here at the Department of English, where they proved a great help; time not spent on explaining how to format papers manually is time that can be used on teaching actual writing skills. After an initial testing phase, we made the APA/MLA templates mandatory for students to use on their term, graduation, and MA papers. Student response to the templates has been very positive, not for any of the reasons outlined above, but simply because the templates make it so much easier to apply the APA/MLA guidelines in a consistent fashion.

As the templates are available to everyone under a free license, we also hope they will find wider adoption.

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