

The noteref Option to the Notes & Bibliography Style

Recent editions of the *Chicago Manual of Style*¹ have suggested that, in short notes, it may sometimes be helpful to provide a cross-reference to the work's initial presentation in a long note, "especially in the absence of a full bibliography." With this release, I have provided for this purpose the `noteref` package option, which additionally involves many sub-options and even a new dependent \LaTeX package `cmsendnotes.sty` (with its own options) to help those users who need the same functionality in endnotes instead of footnotes (see page 3). The full documentation in `biblatex-chicago.pdf` contains all of the murky details, but in this document I wanted to provide straightforward examples so that users could get a quick glimpse of the features provided. § 4.4.4

By setting the following options when loading `biblatex-chicago`:

```
noteref=section,noterefintro=introduction
```

you'll get the following results, in what is obviously a rather artificial setting.

1 Long notes

Text² block³ with⁴ a⁵ series⁶ of⁷ footnotes⁸ chosen⁹ randomly.¹⁰

2 Short notes on the same page

New¹¹ text¹² block¹³ with¹⁴ a¹⁵ series¹⁶ of¹⁷ footnotes¹⁸ chosen¹⁹ randomly.²⁰

Short notes on the same page, or in the same double-page spread when in `twoside` mode, won't by default have a `noteref` printed, though you can in fact alter this on a note-by-note basis by using `\shortrefcite` or `\shorthandrefcite` instead of your usual citation command, as I've done with the Euripides example below.

1. University of Chicago Press, *The Chicago Manual of Style*, 17th ed. (Chicago: University of Chicago Press, 2017), 14.31 (hereafter cited as *CMS*).

2. Marcel Garaud, "Recherches sur les défrichements dans la Gâtine poitevine aux XIe et XIIe siècles," *Bulletin de la Société des antiquaires de l'Ouest*, 4th ser., 9 (1967): 11–27.

3. Leonardo da Vinci, *Madonna of the Rocks*, 1480s, oil on canvas, 78 x 48.5 in., Louvre, Paris.

4. Franz Schubert, "Das Wandern (Wandering)," *Die schöne Müllerin (The Maid of the Mill)*, in *First Vocal Album* (for high voice) (New York: G. Schirmer, 1895).

5. Roland McHugh, *Annotations to "Finnegans Wake"* (Baltimore: Johns Hopkins University Press, 1980).

6. Euripides, *Orestes*, trans. William Arrowsmith, in *Euripides*, vol. 4 of *The Complete Greek Tragedies*, ed. David Grene and Richmond Lattimore (Chicago: University of Chicago Press, 1958), 185–288.

7. Hazel V. Clark, *Mesopotamia: Between Two Rivers* (Mesopotamia, OH: End of the Commons General Store, [1957?]).

8. James B. Ashbrook and Carol Rausch Albright, "The Frontal Lobes, Intending, and a Purposeful God," chap. 7 in *The Humanizing Brain* (Cleveland, OH: Pilgrim Press, 1997).

9. Anna Contributor, "Contribution," in *Edited Volume*, ed. Ellen Editor (Place: Publisher, forthcoming).

10. Dorothea Frede, "Nicomachean Ethics VII. 11–12: Pleasure," in *Aristotle: "Nicomachean Ethics," Book VII*, ed. Carlo Natali, Symposium Aristotelicum (Oxford: Oxford University Press, 2009), 183–207.

11. *CMS*.

12. Garaud, "Recherches sur les défrichements."

13. Leonardo, *Madonna of the Rocks*.

14. Schubert, "Das Wandern."

15. McHugh, *Annotations to "Finnegans Wake."*

16. Euripides, *Orestes* (see § 1, n. 6). ← `\shortrefcite` produced this `noteref` where by default one wouldn't have appeared.

17. Clark, *Mesopotamia*.

18. Ashbrook and Albright, "The Frontal Lobes."

19. Contributor, "Contribution."

20. Frede, "Nicomachean Ethics VII. 11–12."

3 Short notes on a new page

New²¹ text²² block²³ with²⁴ a²⁵ series²⁶ of²⁷ footnotes²⁸ chosen²⁹ randomly.³⁰

Here all of the short notes will, by default, have a noteref. The first note on this page refers back to a long note that occurred *before* section 1, technically therefore in section 0, which is what would appear without further intervention. The intervention I have made is the option `noterefinintro=introduction`, which tells `biblatex-chicago` to print `\bibstring{introduction}` instead of `\bibstring{section}`. The problem of section numbers containing zero can be complicated, so once again the murky details are in `biblatex-chicago.pdf`.

§ 4.4.4,
s.v.
“Zero
Sections”

The main `noteref` option has six possible values, four of which are, I would guess, those most likely to prove useful: `none` (the default), `page`, `chapter`, and `section`, with `subsection` and `part` as additional possibilities. The names of the options correspond to the `TeX` counter tracked by that option in addition to the note number itself, so that `none` produces a noteref that just provides the note number, while `page` provides page and note number, `chapter` gives chapter and note number, and so on. Here, with `section` being the top-level division in the article class, I’ve used that option.

You can suppress the appearance of a noteref by using the `\shortcite*` or `\shorthandcite*` commands, as I’ve shown with the Euripides citation below. You can also set the `noterefininterval` option to a number greater than zero if you want to make sure that a certain number of references have intervened before printing a noteref, even if the short note is on a new page. Because this mechanism tracks the `instcount` counter, which is incremented by more things than just new citations, you may have to experiment to find a value that suits your document.

4 A few extra subtleties

Another³¹ new³² text³³ block³⁴ with³⁵ a³⁶ series³⁷ of³⁸ footnotes³⁹ chosen⁴⁰ randomly.⁴¹

When a noteref for a particular source has already appeared on a page (or a double-page spread) then another won’t be printed after subsequent citations of the same source that appear on that same page. With the second Euripides note below, the noteref *does* appear because it was suppressed after the first reference.

21. CMS (see intro., n. 1).

22. Garaud, “Recherches sur les défrichements” (see § 1, n. 2).

23. Leonardo, *Madonna of the Rocks* (see § 1, n. 3).

24. Schubert, “Das Wandern” (see § 1, n. 4).

25. McHugh, *Annotations to “Finnegans Wake”* (see § 1, n. 5).

26. Euripides, *Orestes*. ← `\shortcite*` suppressed the noteref where by default one would have appeared.

27. Clark, *Mesopotamia* (see § 1, n. 7).

28. Ashbrook and Albright, “The Frontal Lobes” (see § 1, n. 8).

29. Contributor, “Contribution” (see § 1, n. 9).

30. Frede, “*Nicomachean Ethics* VII. 11–12” (see § 1, n. 10).

31. Paulina Jackson to John Pepys Junior, 3 October 1676, in *The Letters of Samuel Pepys and His Family Circle*, ed. Helen Truesdell Heath (Oxford: Clarendon Press, 1955), no. 42.

32. Billie Holiday, vocalist, “I’m a Fool to Want You,” by Joel Herron, Frank Sinatra, and Jack Wolf, recorded February 20, 1958, with Ray Ellis, track 1 on *Lady in Satin*, Columbia CL 1157, 1960, 33¹/₃ rpm.

33. Garaud, “Recherches sur les défrichements.”

34. Leonardo, *Madonna of the Rocks*.

35. Schubert, “Das Wandern.”

36. McHugh, *Annotations to “Finnegans Wake.”*

37. Euripides, *Orestes* (see § 1, n. 6). ← The noteref does appear here, following its suppression above.

38. Clark, *Mesopotamia*.

39. Ashbrook and Albright, “The Frontal Lobes.”

40. Contributor, “Contribution.”

41. Frede, “*Nicomachean Ethics* VII. 11–12.”

Another⁴² new⁴³ text⁴⁴ block⁴⁵ with⁴⁶ a⁴⁷ series⁴⁸ of⁴⁹ footnotes⁵⁰ chosen⁵¹ randomly.⁵²

Once again, after a page break, the noterefs appear after all of these short notes. Because the section number hasn't changed, however, the first two footnotes on the page, which refer back to long footnotes in the same section, have noterefs containing only the note number. This more compact form is the default, but you can set `fullnoterefs` to true when loading `bibtex-chicago` to see the longer form everywhere.

5 Endnotes

Things are slightly more complicated when you are using endnotes instead of footnotes, but in standard cases it's still fairly straightforward. In this document I have added the line:

§ 4.4.4,
s.v.
“End-
notes”

```
\usepackage[split=section]{cmsendnotes}
```

to the preamble *after* loading `bibtex-chicago` (with the options shown on page 1), then printed the endnotes below with `cmsendnotes`'

```
\theendnotesbypart
```

command. As this shows you can, as usual with `bibtex`, mix foot- and endnotes in the same document, but if noterefs are going to appear in both sorts of note — surely this situation is highly unlikely — then you need to be careful that they refer back *only* to long references in the *same* sort of note. A noteref from an endnote to a long citation in a footnote will be inaccurate, so careful use of the `\citereset` command (as here) or perhaps of the `bibtex` `citereset` option should allow you to keep the two sorts of note distinct.

Text¹ block² with³ a⁴ series⁵ of⁶ endnotes⁷ chosen⁸ randomly.⁹

6 More endnotes

Text¹⁰ block¹¹ with¹² a¹³ series¹⁴ of¹⁵ endnotes¹⁶ chosen¹⁷ randomly.¹⁸

When you peruse the endnotes on the next page, please remember that I've simulated a page change in between the two sections, thus allowing all the noterefs to appear as they do. The rules about them appearing (or not) on the same page as the long reference to which they point are the same as for footnotes, so long as you keep in mind that the pages under consideration here are those in the endnotes section itself, *not* in the main text. Also, in this case the standard `\notesname` command provides alternative text for the general header, but `cmsendnotes.sty` organizes the subheaders and facilitates the noterefs, all without further intervention from you beyond the single option already given to that package.

I hope that this short demonstration is enough to get you started using the noteref functionality. I admit that the processing time for documents using it is somewhat increased, so if you have a long document it may require some extra patience. If something doesn't work properly for you, and the main documentation doesn't clear up the issue, please let me know.

42. Jackson to John Pepys Junior (see n. 31). ← The form of this noteref and the next indicates that the short notes are in the same section as the long notes to which they refer. Set `fullnoterefs=true` to get the long form everywhere.

43. Holiday, “I’m a Fool to Want You” (see n. 32).

44. Garaud, “Recherches sur les défrichements” (see § 1, n. 2).

45. Leonardo, *Madonna of the Rocks* (see § 1, n. 3).

46. Schubert, “Das Wandern” (see § 1, n. 4).

47. McHugh, *Annotations to “Finnegans Wake”* (see § 1, n. 5).

48. Euripides, *Orestes* (see § 1, n. 6).

49. Clark, *Mesopotamia* (see § 1, n. 7).

50. Ashbrook and Albright, “The Frontal Lobes” (see § 1, n. 8).

51. Contributor, “Contribution” (see § 1, n. 9).

52. Frede, “*Nicomachean Ethics* VII. 11–12” (see § 1, n. 10).

Endnotes to §§ 5–6

Section 5

1. Marcel Garaud, “Recherches sur les défrichements dans la Gâtine poitevine aux XIe et XIIe siècles,” *Bulletin de la Société des antiquaires de l’Ouest*, 4th ser., 9 (1967): 11–27.
2. Leonardo da Vinci, *Madonna of the Rocks*, 1480s, oil on canvas, 78 x 48.5 in., Louvre, Paris.
3. Franz Schubert, “Das Wandern (Wandering),” *Die schöne Müllerin (The Maid of the Mill)*, in *First Vocal Album* (for high voice) (New York: G. Schirmer, 1895).
4. Roland McHugh, *Annotations to “Finnegans Wake”* (Baltimore: Johns Hopkins University Press, 1980).
5. Euripides, *Orestes*, trans. William Arrowsmith, in *Euripides*, vol. 4 of *The Complete Greek Tragedies*, ed. David Grene and Richmond Lattimore (Chicago: University of Chicago Press, 1958), 185–288.
6. Hazel V. Clark, *Mesopotamia: Between Two Rivers* (Mesopotamia, OH: End of the Commons General Store, [1957?]).
7. James B. Ashbrook and Carol Rausch Albright, “The Frontal Lobes, Intending, and a Purposeful God,” chap. 7 in *The Humanizing Brain* (Cleveland, OH: Pilgrim Press, 1997).
8. Anna Contributor, “Contribution,” in *Edited Volume*, ed. Ellen Editor (Place: Publisher, forthcoming).
9. Dorothea Frede, “Nicomachean Ethics VII. 11–12: Pleasure,” in *Aristotle: “Nicomachean Ethics,” Book VII*, ed. Carlo Natali, *Symposium Aristotelicum* (Oxford: Oxford University Press, 2009), 183–207.

Section 6

10. Garaud, “Recherches sur les défrichements” (see § 5, n. 1). ← Page “break” before this note.
11. Leonardo, *Madonna of the Rocks* (see § 5, n. 2).
12. Schubert, “Das Wandern” (see § 5, n. 3).
13. McHugh, *Annotations to “Finnegans Wake”* (see § 5, n. 4).
14. Euripides, *Orestes* (see § 5, n. 5).
15. Clark, *Mesopotamia* (see § 5, n. 6).
16. Ashbrook and Albright, “The Frontal Lobes” (see § 5, n. 7).
17. Contributor, “Contribution” (see § 5, n. 8).
18. Frede, “Nicomachean Ethics VII. 11–12” (see § 5, n. 9).