

The Chicago Notes & Bibliography Specification

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This file is intended as a brief introduction to the Chicago notes & bibliography specification (17th ed.)¹ as implemented by `biblatex-chicago`, and falls somewhere in between the “Quick-start” section of `biblatex-chicago.pdf` and the full documentation as presented in section 4 of that same document. Please note that the package functionality as described here depends on using `biber` as your backend; if you use a different backend the results will inevitably be disappointing. I’ve attempted to design this introduction for ease of cross-reference, so clicking on long-note citations should bring you to the bibliography entry, whence clicking on the entry key in the annotation should present you with the entry as it appears in the `.bib` file, where clicking on the entry type should return you to the long note. If you have questions beyond the scope of this introduction, then the full documentation is the place to look next — marginal notes here refer to section or page numbers there, and if you’ve installed the package using the standard T_EX Live method then clicking on these marginal notes should take you to the other document. If you can’t find answers there, please write to me at the email address in `biblatex-chicago.pdf`. § 4

Standard entry types

These should pose no particular issues to those who have used BIB_TE_X or `biblatex` before, but here is an example of each of the following standard entry types: `Article`, `Book`, `Booklet`, `InBook`, `InCollection`, `InProceedings`, `Manual`, `MastersThesis`, `TechReport`, and `Unpublished`. § 4.1

Long-Note Style

Article: 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.

Book: Roland McHugh, *Annotations to “Finnegans Wake”* (Baltimore: Johns Hopkins University Press, 1980).

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

InBook: 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).

InCollection: Anna Contributor, “Contribution,” in *Edited Volume*, ed. Ellen Editor (Place: Publisher, forthcoming).

InProceedings: 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.

Manual: Electronic Book Technology Inc., *Dynatext, Electronic Book Indexer/Browser* (Providence, RI: Electronic Book Technology Inc., 1991).

MastersThesis: Dorothy Ross, “The Irish-Catholic Immigrant, 1880–1900: A Study in Social Mobility” (master’s thesis, Columbia University, n.d.).

TechReport: Eric van Herwijnen, *Future Office Systems Requirements*, technical report (CERN DD internal note, November 1988).

Unpublished: Clifford Nass, “Why Researchers Treat On-Line Journals Like Real People” (keynote address, annual meeting of the Council of Science Editors, San Antonio, TX, May 6–9, 2000).

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

Bibliography Style (with annotations)

Ashbrook, James B., and Carol Rausch Albright. “The Frontal Lobes, Intending, and a Purposeful God.” Chap. 7 in *The Humanizing Brain*. Cleveland, OH: Pilgrim Press, 1997.

[ashbrook:brain] A typical InBook entry, identified both by a title and also, in this case, by a chapter number rather than a pages range.

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

[clark:mesopot] A standard Booklet entry, though the same information could be presented in a Book entry, using publisher instead of howpublished. Note the ISO8601-2 “uncertain” date specification, which by default presents the year in brackets, but allows numerical sorting by biblatex.

Contributor, Anna. “Contribution.” In *Edited Volume*, edited by Ellen Editor. Place: Publisher, forthcoming.

[contrib:contrib] A fabricated InCollection entry, showing how to present a forthcoming essay using the pubstate field. Cf. author:forthcoming.

Electronic Book Technology Inc. *Dynatext, Electronic Book Indexer/Browser*. Providence, RI: Electronic Book Technology Inc., 1991.

[dyna:browser] A technical manual presented in a Manual entry. In the absence of a named author the organization is printed twice, as author and as publisher. If you are using Biber, you don’t need a sortkey to help with alphabetization, though with BIB_TE_X it would still be necessary.

Frede, Dorothea. “*Nicomachean Ethics* VII. 11–12: Pleasure.” In *Aristotle: “Nicomachean Ethics,” Book VII*, edited by Carlo Natali, 183–207. Symposium Aristotelicum. Oxford: Oxford University Press, 2009.

[frede:inproc] A fairly standard InProceedings entry, showing some of the complications of formatting titles within titles in both the title and the booksubtitle fields.

Garaud, Marcel. “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.

[garaud:gatine] An Article entry with author, title, journaltitle, year, volume, series, and pages fields. Note also the preservation of French capitalization in the two titles.

McHugh, Roland. *Annotations to “Finnegans Wake.”* Baltimore: Johns Hopkins University Press, 1980.

[mchugh:wake] A Book with a quoted title inside an italicized one. If you use `\mkbibquote` the package will automatically do the right thing, moving punctuation inside the quotation marks.

Nass, Clifford. “Why Researchers Treat On-Line Journals Like Real People.” Keynote address, annual meeting of the Council of Science Editors, San Antonio, TX, May 6–9, 2000.

[nass:address] An Unpublished entry, presenting an unpublished piece that isn’t part of a formal archive. The note field provides the details of what sort of piece it is, while the eventtitle and eventdate tell where and when it appeared. The note field begins with a lowercase letter, so that biblatex-chicago can automatically capitalize it when the context demands.

Ross, Dorothy. “The Irish-Catholic Immigrant, 1880–1900: A Study in Social Mobility.” Master’s thesis, Columbia University, n.d.

[ross:thesis] A Thesis entry with its type automatically set by using the alias MastersThesis. The nodate `\bibstring` (which gives “n.d.” in English) may be used in almost any entry type if you can’t find a date.

van Herwijnen, Eric. *Future Office Systems Requirements*. Technical report. CERN DD internal note, November 1988.

[[herwign:office](#)] A Report entry, with the type field automatically set by using the TechReport alias instead of Report. The institution field identifies the issuer of the report.

Other entry types

These entry types are biblatex innovations, designed to cater for as large a range of reference needs as possible. The list here is by no means exhaustive, but rather tries to exemplify some of the more complicated or (possibly) unfamiliar entry types, including: Artwork, Audio, BookInBook, Dataset, InReference, Letter, Music, Performance, Review, Standard, SuppBook, and Video. § 4.1

Long-Note Style

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

Audio: 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).

BookInBook: 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.

Dataset: GenBank (for RP11-322N14 BAC [accession number AC087526.3]; accessed April 6, 2016), <http://www.ncbi.nlm.nih.gov/nucleotide/19683167>.

InReference: Wikipedia, s.v. “BibTeX,” last edited November 15, 2019, 20:59, <http://en.wikipedia.org/wiki/BibTeX>.

Letter: 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.

Music: 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.

Performance: *Hamilton*, music and lyrics by Lin-Manuel Miranda, dir. Thomas Kail, chor. Andy Blakenbuehler, Richard Rodgers Theatre, New York, NY, February 2, 2016.

Review: Ben Ratliff, review of *The Mystery of Samba: Popular Music and National Identity in Brazil*, by Hermano Vianna, ed. and trans. John Charles Chasteen, *Lingua Franca* 9 (April 1999): B13–B14.

Standard: *Bibliographic References*, ANSI/NISO Z39.29-2005 (Bethesda, MD: National Information Standards Organization, approved June 9, 2005; reaffirmed May 13, 2010).

SuppBook: Valerie Polakow, afterword to *Lives on the Edge: Single Mothers and Their Children in the Other America* (Chicago: University of Chicago Press, 1993).

Video: Michael Curtis and Gregory S. Malins, “The One with the Princess Leia Fantasy,” *Friends*, season 3, episode 1, dir. Gail Mancuso, aired September 19, 1996 (Burbank, CA: Warner Home Video, 2003), DVD.

Bibliography Style

Curtis, Michael, and Gregory S. Malins. “The One with the Princess Leia Fantasy.” *Friends*, season 3, episode 1. Directed by Gail Mancuso. Aired September 19, 1996. Burbank, CA: Warner Home Video, 2003. DVD.

[[friends:leia](#)] This is a template for citing an episode of a television series using a Video entry. The name of the episode goes in the title field while the name of the series goes in booktitle. (Were you to cite an entire series rather than a single episode, you wouldn’t need the booktitle for it, but only a title.) The writers of the episode go in author, while the director goes in editor, using an editortype field to specify her role, something of frequent occurrence in the audio-visual types. The eventdate is the original broadcast date, while the date applies to the medium you are citing. That medium itself goes in the type field. Note that information about the season and episode numbers goes in booktitleaddon. Cf. [american:crime](#) for an example using the new 17th edition tvepisode entrysubtype which reverses the traditional order of title and booktitle.

Euripides. *Orestes*. Translated by William Arrowsmith. In *Euripides*. Vol. 4 of *The Complete Greek Tragedies*, edited by David Grene and Richmond Lattimore, 185–288. Chicago: University of Chicago Press, 1958.

[euripides:orestes] A work from antiquity, cited by pages in a modern edition, hence not needing classical in the entrysubtype field. Since the titles of such works are uniformly italicized, we need to use a BookInBook entry with a title and a booktitle (“book within a book”) and in this case also a maintitle, a multi-volume collection of booktitles. Note also the editors of the maintitle (editor field), and the translator of the title (nameb field).

GenBank (for RP11-322N14 BAC [accession number AC087526.3]; accessed April 6, 2016). <http://www.ncbi.nlm.nih.gov/nucore/19683167>.

[genbank:db] The Dataset type helps to present scientific databases as specified by the 17th edition. The name of the database appears in the author field, while the title, type, and number fields present locating and/or explanatory information about particular parts of the data. A url locates the database and the urldate documents when you accessed it.

Hamilton. Music and lyrics by Lin-Manuel Miranda. Directed by Thomas Kail. Choreographed by Andy Blakenbuehler. Richard Rodgers Theatre, New York, NY, February 2, 2016.

[hamilton:miranda] New in the 17th-edition styles, the Performance entry type allows you to cite individual live performances, usually including a number of editortypes for specifying various contributors. The options field useeditor=false means that the title of the piece will come first in notes and bibliography.

Holiday, Billie, 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.

[holiday:fool] This entry illustrates some of the peculiarities of Music entries. It cites a song (title) from an album (booktitle). (Were you to cite a whole album, then you wouldn’t need the booktitle, only the album title in title.) The chapter gives the track number on the album. The writers of the song go in author, while the options field prevents these writers from appearing at the head of notes or of the entry in the bibliography. The performer goes in editor, with the editortype giving, as the 17th edition seems to like, what sort of performer she is. The eventdate gives the recording date of a song — you would use origdate if the recording date applied to the album as a whole. The date gives the release date of the album, while the type field gives the medium of the release.

Jackson, Paulina. Paulina Jackson to John Pepys Junior, 3 October 1676. In *The Letters of Samuel Pepys and His Family Circle*, edited by Helen Truesdell Heath, no. 42. Oxford: Clarendon Press, 1955.

[jackson:paulina:letter] An individual letter from a published collection, hence the Letter entry, designed specifically for this sort of reference. The title field should always look like this, and the author won’t be printed in notes, as this field already specifies it. The shorttitle’s form is specific to this entry type, eventually printing the author’s surname followed by the contents of this field, which again is specified for this type of reference. The origdate field holds the date of the original letter, while the year (or date) holds the date of the publication of the collection as a whole. The pages field in this example holds not the page, but the number in the collection – notice the \bibstring – while the booktitle is the title of that published collection. If you refer to more than one letter from such a collection, then only the name of the collection need appear in the bibliography.

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

[leo:madonna] This is a typical Artwork entry, with the artist presented in the author field. Note the type field for the medium of the work, and also the fact that it begins with a lowercase letter, allowing biblatex to capitalize it contextually when needed. Note also the ISO8601-2 decade specification in the date field. Biblatex-chicago now supports multiple dates in Artwork entries, allowing you to identify, e.g., when a photograph was printed as well as when it was taken. See the main documentation for details.

National Information Standards Organization. *Bibliographic References*. ANSI/NISO Z39.29-2005. Bethesda, MD: NISO, approved June 9, 2005; reaffirmed May 13, 2010.

[niso:bibref] The 17th edition has added some information to entries presenting national or international standards, so biblatex-chicago now has a separate entry type for them. Here you can see two dates, one when first approved (date) and another when reaffirmed (eventdate). Each of these dates has a field for informing readers just what sort of date it is, userd and howpublished, respectively. The series and number fields identify the standard, while the organization responsible for the standard appears in the organization field, and also, in shortened form if you wish it, in the publisher field. Cf. w3c.xml.

Polakow, Valerie. Afterword to *Lives on the Edge: Single Mothers and Their Children in the Other America*, 175–84. Chicago: University of Chicago Press, 1993.

[polakow:afterw] The SuppBook entry type is rather like the Review type, in that it covers texts with generic titles instead of specific ones, only the text, as here, is contained not in a journal but in a Book. In its current state, the SuppBook type in biblatex-chicago is a little anomalous with respect to general biblatex usage. This will evolve in future releases, but for now, in order to cite, for example, an afterword written by the main author of the book, you need only put something in the afterword field (and not define a foreword or introduction field) to make the otherwise Book-like reference work. Recent editions of the CMS require, for the entry in the bibliography, a pages range for the part being cited.

Ratliff, Ben. Review of *The Mystery of Samba: Popular Music and National Identity in Brazil*, by Hermano Vianna, edited and translated by John Charles Chasteen. *Lingua Franca* 9 (April 1999): B13–B14.

[ratliff:review] The Review entry type functions much like the Article type, but is designed to present articles which have only a generic title rather than a specific one, like the book review cited by this entry. Note, first, the `\bibstrings` in the title and shorttitle — using them isn't strictly necessary, and you could also just write them out, taking care to start each field with a lowercase letter to allow for contextual capitalization. (The `\bibstrings` make the entry portable across languages.) Note, second, the formatting in both fields of the title of the book reviewed. Most especially note the use of `\parteditandtrans`, which is necessary here to allow the editor and translator of the reviewed book to be identified by the correct (different) strings in notes and bibliography.

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

[schubert:muellerin] The Audio entry type is the most “book-like” of the three audio-visual entry types, but does differ in several ways from an ordinary book, and therefore requires a separate type. This is a citation of a published musical score, with the composer in the author field. It cites one song (title) from a cycle (booktitle), while the maintitle in this instance refers to the publisher's collection of the composer's works. The options field changes the punctuation to `\addspace` before the parenthesized maintitleaddon.

Wikipedia, s.v. “BibTeX.” Last edited November 15, 2019, 20:59. <http://en.wikipedia.org/wiki/BibTeX>.

[[wikiped:bibtex](#)] InReference entries are designed to allow you to cite particular articles in an alphabetically-arranged reference work. The `lista` field holds the name of the article, and for printed works you can use the standard postnote field to make a single `.bib` entry work for references to several different articles. For an online work, you must have a `urldate` field, as such sources change rather rapidly, and in the case of heavily contested articles it could well be useful to also to include a time stamp in the same field, as here (though this isn’t necessary at all for this article). The `userd` field allows you to identify which sort of date is at stake. Online works which haven’t had any sort of printed existence can, at your discretion, have titles in plain roman (like an Online entry). Defining an `entrysubtype` field achieves this. Ordinarily, such an entry need not be printed in the bibliography, only in notes, but here it will appear in both for the sake of example.

Short notes

The note forms we’ve seen so far are intended to appear on the first citation of a given work, while subsequent citations use a shorter form, usually merely Author, Title. Both of these fields, of course, have a short form to allow space-saving abridgements of names and titles. You can also use the option `short` when you load `biblatex-chicago` and you’ll get the short form from the start, something only recommended by the *CMS* when you have a full bibliography to clarify all the abbreviated references. (In the absence of a full bibliography, you can also use the `noteref` option to provide cross-references from short notes to long ones. Please consult [cms-noteref-demo.pdf](#).) The following are the short forms of all the works cited in long notes in previous sections: Article, Artwork, Audio, Book, BookInBook, Booklet, Dataset, InBook, InCollection, InProceedings, InReference, Letter, Manual, MastersThesis, Music, Performance, Review, Standard, SuppBook, TechReport, Unpublished, and Video.

§ 4.2, s.v. “shortauthor”

§ 4.4.4

Short-Note Style

Article: Garaud, “Recherches sur les défrichements.”

Artwork: Leonardo, *Madonna of the Rocks*.

Audio: Schubert, “Das Wandern.”

Book: McHugh, *Annotations to “Finnegans Wake.”*

BookInBook: Euripides, *Orestes*.

Booklet: Clark, *Mesopotamia*.

Dataset: GenBank (for RP11-322N14 BAC).

InBook: Ashbrook and Albright, “The Frontal Lobes.”

InCollection: Contributor, “Contribution.”

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

InReference: Wikipedia, s.v. “Aristotle.”

Letter: Jackson to John Pepys Junior.

Manual: Electronic Book Technology Inc., *Dynatext*.

MastersThesis: Ross, “The Irish-Catholic Immigrant, 1880–1900.”

Music: Holiday, “I’m a Fool to Want You.”

Performance: *Hamilton*.

Review: Ratliff, review of *The Mystery of Samba*.

Standard: *Bibliographic References*.

SuppBook: Polakow, afterword to *Lives on the Edge*.

TechReport: van Herwijnen, *Future Office Systems Requirements*.

Unpublished: Nass, “Why Researchers Treat On-Line Journals Like Real People.”

Video: Curtis and Malins, “The One with the Princess Leia Fantasy.”

The entrysubtype field

The Chicago notes & bibliography style covers a wide variety of source materials, so it is perhaps no surprise that even the range of entry types offered by biblatex isn't quite sufficient. In many cases, the entrysubtype field can further expand the repertoire available to users. Such cases include, in particular, the periodical types, where the CMS differentiates between articles and reviews in scholarly journals and those in magazines and newspapers aimed at a more general readership. For the latter two sorts of source, you place the string `magazine` in the entrysubtype field, and the citation style changes accordingly: `Article` and `Review`.

§ 4.2, s.v.
“entry-
subtype”

The `Misc` type likewise uses the entrysubtype field as a toggle to alter the general presentation of a source. Without such a field, `Misc` entries function as they do in standard biblatex and in `BIBTEX`, that is, as hold-alls for sources that won't easily fit into other categories. (Ideally, such entries will be very rare when using biblatex-chicago.) With an entrysubtype `Misc` entries will present their source as part of an unpublished archive, to be distinguished from `Unpublished` entries, which usually will have a specific title and won't come from a named archive: `Misc`.

The entrysubtype field is, finally, also useful for presenting pre-Renaissance works by their traditional divisions into books, sections, lines, etc., divisions which are presumed to be the same across all editions. For such citations, you put the string `classical` into the entrysubtype field, and though this has no effect on long notes or in the bibliography, it changes the punctuation in short notes, as below: `BookInBook`. (Were you citing such a work by the pages in a modern edition, the entrysubtype would be unnecessary — see the Euripides citation above.)

Note Style

Article: “Pushcarts Evolve to Trendy Kiosks,” *Lake Forester* (Lake Forest, IL), March 23, 2000.

Review: McGeorge Bundy, interview by Robert MacNeil, *MacNeil/Lehrer NewsHour*, PBS, February 7, 1990.

Misc: George Creel to Colonel House, 25 September 1918, Edward M. House Papers, Yale University Library.

BookInBook: Plato, *Republic* 360e–361b.

Bibliography Style

Bundy, McGeorge. Interview by Robert MacNeil. *MacNeil/Lehrer NewsHour*, PBS, February 7, 1990.

[bundy:macneil] A television interview, with a generic title, presented in a `Review` entry, with `magazine` entrysubtype. The CMS often treats such sources, including online ones, as journal titles in `Article` or `Review` entries, the entrysubtype indicating the distance from traditional scholarly journals. Note here that the interviewee is presented as the author, and that the broadcast network is given in the `usera` field. Note also the use of lowercase letters to start both title and shorttitle, allowing automatic contextual capitalization of a generic title in a `Review` entry.

Creel, George. George Creel to Colonel House, 25 September 1918. Edward M. House Papers. Yale University Library.

[creel:house] An unpublished letter from an archive, presented in a `Misc` entry with an entrysubtype. You can avoid the awkward repetition of the author's name in notes by using `\headlesscite` or `\headlessfullcite` instead of the usual citation commands. The manuscript collection is found in the `note` and `organization` fields — depending on the entry, you can use `note`, `organization`, `institution`, and/or `location`, in ascending order of generality, though you should consistently put the most specific collection name in the `note` field. As in `Letter` entries the date of the letter goes in `origdate`, and in the short note form you can use the macro `\letterdatelong` in the `postnote` field to identify the letter by this date, if it helps disambiguate. (In other non-letter-like `Misc` entries, you would use the `date` field instead of `origdate`.)

Lake Forester (Lake Forest, IL). “Pushcarts Evolve to Trendy Kiosks.” March 23, 2000.

[lakeforester:pushcarts] An Article entry from a newspaper. As the source isn’t a traditional scholarly one, the entry requires `magazine` in the `entrysubtype` field. The article doesn’t have an author, so the title will be used at the head of the entry in long notes, while the `journaltitle` appears there in short notes and the bibliography. (The *CMS* suggests that such sources needn’t appear in the bibliography at all, assuming that the note contains a full enough reference.) The newspaper might not be well known, so the `location` field helps your readers out in this case. If you are using Biber, a `sortkey` field isn’t necessary to alphabetize by `journaltitle` rather than by title.

Plato. *Republic*. In *Clitophon, Republic, Timaeus, Critias*. Vol. 4 of *Opera*, edited by J. Burnet, 327–621. Oxford Classical Texts. Oxford: Clarendon Press, 1902.

[plato:republic:gr] A work from antiquity, which will be cited by the traditional divisions of Stephanus’ edition, and which therefore requires the `classical` `entrysubtype`. The title of such a work being italicized, it needs a `BookInBook` entry, and it has all three sorts of title, plus a series to boot.

Abbreviated references

The *CMS* suggests, as a space-saving measure, that when multiple parts of a single collection are present in a reference apparatus, then references may, following certain rules, abbreviate the portion that refers to the collection as a whole. *Biblatex-chicago* implements this recommendation using a combination of package options (both entry and preamble) and the `crossref` and `xref` fields. In `InBook`, `InCollection`, `InProceedings`, and `Letter` entries, the option is `longcrossref`, set to `false` by default, so if more than one such entry cross-references the same parent entry, then the abbreviated notes and bibliography entries will automatically appear. The first full note citing such a source is not abbreviated, but all subsequent notes, and all bibliography entries, are: `InCollection`, `InCollection`, `Collection`.

§ 4.2, s.v.
“crossref”

The possible settings for the `longcrossref` option are `true` (no abbreviated references); `false` (abbreviated references in notes and bibliography); `notes` (abbreviated references only in the bibliography); `bib` (abbreviated references only in notes); and `none` (abbreviated references everywhere, including in the four entry types controlled by the `booklongxref` option).

The four entry types subject to the `booklongxref` option are `Book`, `BookInBook`, `Collection`, and `Proceedings`. The option has the same four settings as `longcrossref`, excluding the `none` switch, but it is set to `true` by default, because the *CMS* isn’t as explicit in condoning abbreviated references in such entry types, so you have to turn them on yourself, as I have in this document using `booklongxref=false` in the preamble when loading *biblatex-chicago*: `Collection`, `Collection`, `MVCollection`.

Note Style

InCollection: Elizabeth F. L. Ellet, “By Rail and Stage to Galena,” in *Prairie State: Impressions of Illinois, 1673–1967, by Travelers and Other Observers*, ed. Paul M. Angle (Chicago: University of Chicago Press, 1968), 271–79.

InCollection: William H. Keating, “Fort Dearborn and Chicago,” in Angle, *Prairie State*, 84–87.

Collection: Angle, *Prairie State*.

Collection: J. B. Harley and David Woodward, eds., *Cartography in Prehistoric, Ancient, and Medieval Europe and the Mediterranean*, vol. 1 of *The History of Cartography* (Chicago: University of Chicago Press, 1987).

Collection: J. B. Harley and David Woodward, eds., *Cartography in the Traditional East and Southeast Asian Societies* (1994), vol. 2, bk. 2 of *The History of Cartography*.

MVCollection: Harley and Woodward, *The History of Cartography*.

Bibliography Style

Angle, Paul M., ed. *Prairie State: Impressions of Illinois, 1673–1967, by Travelers and Other Observers*. Chicago: University of Chicago Press, 1968.

[prairie:state] A Collection entry, the one that has been cross-referenced by two other entries in this bibliography. Note the editor instead of an author in this entry type. If more than one child cross-references the parent, the parent will be printed in the bibliography even if not independently cited, though I have cited it here to illustrate that, as far as biblatex-chicago is concerned, this work has already been cited (by the two previous notes), thus producing a short note.

Ellet, Elizabeth F. L. “By Rail and Stage to Galena.” In Angle, *Prairie State*, 271–79.

[ellet:galena] First of two InCollection entries cross-referencing the same Collection. Since it is cited first in the test file, its long note reference contains the full bibliographical data for the Collection entry, whereas the subsequent long note — **keating:dearborn** — contains an abbreviated reference to the Collection. Both parts have an abbreviated reference in the bibliography. If you don’t want this space-saving measure, then you can, for example, set `longcrossref=true` in the options field. With Biber, an empty subtitle field is no longer necessary to prevent inheritance from the parent entry, and the title of a Collection will become a booktitle in its children.

Harley, J. B., and David Woodward, eds. *Cartography in Prehistoric, Ancient, and Medieval Europe and the Mediterranean* (1987). Vol. 1 of *The History of Cartography*.

[harley:ancient:cart] A Collection entry, with the maintitle coming from the MVCollection entry cited in the crossref field. With the `booklongxref` option set properly, and not by default, this and **harley:cartography** will produce abbreviated references in the bibliography and in long notes (after the first).

———, eds. *Cartography in the Traditional East and Southeast Asian Societies* (1994). Vol. 2, bk. 2 of *The History of Cartography*.

[harley:cartography] A second Collection entry cross-referencing the same MVCollection. With the `booklongxref` option set to `false` in the preamble, this and the previous entry will now produce abbreviated references in the bibliography and in long notes (after the first). Since its maintitle’s logical volumes are sometimes published in separate physical parts, it has both a volume and a part number.

———, eds. *The History of Cartography*. 3 vols. Chicago: University of Chicago Press, 1987–.

[harley:hoc] This entry shows the MVCollection type used as the parent to two child Collection entries — **harley:ancient:cart** and **harley:cartography**. It will be presented in the bibliography when more than one of its children are cited, even if it isn’t itself independently cited. Please note that this style of cross-referencing, where the title of the MVCollection automatically becomes the maintitle of the Collection, is only available with Biber as your backend.

Keating, William H. “Fort Dearborn and Chicago.” In Angle, *Prairie State*, 84–87.

[keating:dearborn] Second of the InCollection pieces from the same Collection, the latter identified using the `crossref` field. Even in the first, long note, the data for the whole collection will be presented in abbreviated form, since **ellet:galena** (which see) has already been cited.

Online materials

The 17th edition of the *CMS* has extended its treatment of online sources, and has also somewhat altered the principles of that treatment. Earlier editions emphasized the nature of the source (book-like, journal-like, etc.), rather more than how that source was accessed (printed volume, online, etc.), whereas the current specification places somewhat greater — though not total — emphasis on where it was accessed, which can in many cases determine what sort

§ 4.1, s.v. “online”

of entry type you need. I have provided a quick guide to the correspondences between online materials and biblatex-chicago entry types in table 1 of `biblatex-chicago.pdf`, and include a few examples here. An online edition of a printed book still calls for a `Book` entry, and the rules are similar for a printed journal that has an online portal. For intrinsically online sources, even if they are structured more or less like a conventional printed periodical, you may (at your discretion) choose to present them in an `Online` entry rather than an `Article` one. Blogs lend themselves well to the `Article` type, while a comment on a blog becomes a `Review`, here using the `commenton` relatedtype. Social media posts, by contrast, even of photographs, for example, need an `Online` entry. For things like mailing lists or less journalistic web pages, the `Online` type works well, as it does for short online videos (`Online`) and for short online audio pieces, too: `Online`.

Note Style

- Book:** Henry James, *The Ambassadors* (1909; Project Gutenberg, 1996), <ftp://ibiblio.org/pub/docs/books/gutenberg/etext96/ambas10.txt>.
- Online:** Richard Stenger, “Tiny Human-Borne Monitoring Device Sparks Privacy Fears,” CNN.com, December 20, 1999, <http://www.cnn.com/1999/TECH/ptech/12/20/implant.device/>.
- Article:** Rhian Ellis, “Squatters’ Rights,” *Ward Six* (blog), June 30, 2008, <http://wardsix.blogspot.com/2008/06/squatters-rights.html>.
- Review:** AC, July 1, 2008, 10:18 a.m., comment on Ellis, “Squatters’ Rights,” <http://wardsix.blogspot.com/2008/06/squatters-rights.html>.
- Online:** Pete Souza (@petesouza), “President Obama bids farewell to President Xi of China at the conclusion of the Nuclear Security Summit,” Instagram photo, April 1, 2016, <https://www.instagram.com/p/BDrmfXTtNct/>.
- Online:** John Powell, “Pattern Matching,” Grapevine digest mailing list archives, Electric Editors, April 23, 1998, <http://www.electriceditors.net/grapevine/archives.php>.
- Online:** Michael Pollan, “Michael Pollan Gives a Plant’s-Eye View,” filmed March 2007, TED video, 17:31, posted February 2008, http://www.ted.com/index.php/talks/michael_pollan_gives_a_plant_s_eye_view.html.
- Online:** Calvin Coolidge, “Equal Rights” (speech), copy of an undated 78 rpm disc, ca. 1920, Library of Congress, “American Leaders Speak: Recordings from World War I and the 1920 Election, 1918–1920,” RealAudio and WAV formats, <http://memory.loc.gov/ammem/nfhtml/nforSpeakers01.html>.

Bibliography Style

AC. July 1, 2008, 10:18 a.m. Comment on Ellis, “Squatters’ Rights.” <http://wardsix.blogspot.com/2008/06/squatters-rights.html>.

[ac:comment] The 17th edition suggests a `Review` entry such as this for presenting comments on blogs or other similar online material, achievable either with hand-formatting in the title field or, as here, using the `commenton` relatedtype. The `related` field (`ellis:blog`) indicates the entry upon which it is a comment, and by default the generic title derives from the relatedtype, though you can change it by providing a `relatedstring`. With such a title it’s a `Review` instead of an `Article`. The `eventdate` gives the date of the comment, including a time stamp for additional specificity if needed. `Biblatex-chicago` automatically sets the `related` option to `true` for this relatedtype, so you’ll see all the relevant data both in notes and, if you choose to print it there, in the bibliography.

Coolidge, Calvin. “Equal Rights” (speech). Copy of an undated 78 rpm disc, ca. 1920. Library of Congress, “American Leaders Speak: Recordings from World War I and the 1920 Election, 1918–1920,” RealAudio and WAV formats, <http://memory.loc.gov/ammem/nfhtml/nforSpeakers01.html>.

[loc:leaders] It’s worth noting that the annotations to this related entry appear *before* those of the parent entry. Here, an `Online` entry provides the online archive location of the `coolidge:speech` entry, which references it using a `related` field. You no longer need `skipbib` in the options field,

as by default entries cited only by the related system won't appear on their own. Cp. `loc:city` and `weed:flatiron`.

[coolidge:speech] This is a recording from an online archive, using an Online entry. The two `titleaddon` options allow the parenthesized `titleaddon` to appear with only a space intervening, both in notes and bibliography. The `related` field cites the archive itself, another Online entry, and the `related=true` option causes the archive reference to be printed both in notes and bibliography. The `date` field presents a "circa" date in ISO8601-2 format, and the options `nodatebrackets` and `nodates` format the circa date as it appears, in this instance, in the *Manual*. Cp. `weed:flatiron` and `loc:city`, which cite a film from an online archive, both using a Video entry.

Ellis, Rhian. "Squatters' Rights." *Ward Six* (blog), June 30, 2008. <http://wardsix.blogspot.com/2008/06/squatters-rights.html>.

[ellis:blog] Recent editions of the *CMS* specify an Article-like presentation for blogs, the main peculiarity being the identification of the material as a blog using the `location` field, which is usually reserved for identifying the place of publication of obscure journals. See `ac:comment`, a Review entry, for how to reference comments on such online material.

James, Henry. *The Ambassadors*. 1909. Project Gutenberg, 1996. <ftp://ibiblio.org/pub/docs/books/gutenberg/etext96/ambas10.txt>.

[james:ambassadors] This cites an online edition of a book which, not being inherently an online text, uses a Book entry. The `origdate` field is the date of the print publication of the text that is now online.

Pollan, Michael. "Michael Pollan Gives a Plant's-Eye View." Filmed March 2007. TED video, 17:31. Posted February 2008. http://www.ted.com/index.php/talks/michael_pollan_gives_a_plant_s_eye_view.html.

[pollan:plant] An online video, presented in an Online entry. Note the `userd` field to modify the string printed before the `urldate`, and also the `titleaddon` in place of a `date` field, in case you want that information in closer association with the title. Cf. `harwood:biden`, `horowitz:youtube`.

Powell, John. "Pattern Matching." Grapevine digest mailing list archives. Electric Editors, April 23, 1998. <http://www.electricteditors.net/grapevine/archives.php>.

[powell:email] A fairly standard Online entry with a title and a `titleaddon`, the latter giving somewhat more specific locating information than the `organization` field.

Souza, Pete (@petesouza). "President Obama bids farewell to President Xi of China at the conclusion of the Nuclear Security Summit." Instagram photo, April 1, 2016. <https://www.instagram.com/p/BDrmfXTtNct/>.

[souza:obama] A 17th-edition social media citation, presented as an Online entry even though the actual material of the citation is a photograph. Note the `nameaddon` field for the screen name.

Stenger, Richard. "Tiny Human-Borne Monitoring Device Sparks Privacy Fears." CNN.com, December 20, 1999. <http://www.cnn.com/1999/TECH/ptech/12/20/implant.device/>.

[stenger:privacy] This is an intrinsically-online source, but is structured like a newspaper, so in previous editions of the *Manual* it would have required an Article entry type and `magazine` `entrysubtype`. For the 17th edition, at your discretion, such sources may be treated, as here, like a website rather than a newspaper, though the older style may be retained.

Related entries

Biblatex provides a powerful mechanism, using the `related` field, for grouping two (or more) works together in a single entry in the bibliography and/or in long notes, while biblatex-chicago offers both this functionality and some Chicago-specific variants which employ different means. You can find a full discussion of this in `biblatex-chicago.pdf`, but two of the entries already cited in the previous section (`coolidge:speech` & `ac:comment`) present the two related entries together in both notes and bibliography, whereas a third example places a text and its translation together, but only in the bibliography: `Book`. Another example shows how to present multi-volume works with the `maintitle` before the booktitle using the `maintitle relatedtype`, as is sometimes recommended by the CMS: `BookInBook`. (The `plato:republic:gr` entry on page 7 shows the more traditional presentation syntax.) § 4.2.1

Note Style

`Book`: François Furet, *Le passé d'une illusion* (Paris: Éditions Robert Laffont, 1995).

`BookInBook`: Plato, *Timaeus*, in *Opera*, ed. J. Burnet, Oxford Classical Texts, vol. 4 of 5, *Clitopho, Res Publica, Timaeus, Critias* (Oxford: Clarendon Press, 1902), 17–105.

Bibliography Style

Furet, François. *Le passé d'une illusion*. Paris: Éditions Robert Laffont, 1995. Translated by Deborah Furet as *The Passing of an Illusion* (Chicago: University of Chicago Press, 1999).

`[furet:passing:eng]` A translation, serving as the target of the `related` field of `furet:related`. If it isn't cited independently, it will appear only after that entry in the bibliography, connected to it using the format defined by the `relatedtype` `bytranslator`. You could also give this entry a `userf` field referring to the original text, `furet:passing:fr`, or indeed a `related` field referring to the same `.bib` entry, along with a `relatedtype` `origpubas`. In notes, by default, neither of these mechanisms would have any effect, but in the bibliography the translation and the original would be presented in the same entry, connected (in the absence of an `origlanguage` or `relatedstring` field, respectively) by the string “Originally published as.”

`[furet:related]` This entry presents the same `Book` as `furet:passing:fr`, but does so using the `relatedtype` `bytranslator` functionality. This is the alternate Chicago form for presenting a text and its translation together in a single bibliography entry. Cp. `furet:passing:eng`.

Plato. *Timaeus*. In *Opera*, edited by J. Burnet, Oxford Classical Texts. Vol. 4 of 5, *Clitopho, Res Publica, Timaeus, Critias*, 17–105. Oxford: Clarendon Press, 1902.

`[plato:tomeiv]` See `plato:total` and `plato:timaeus:gr`.

`[plato:total]` This may look like a multi-volume book but in truth, because of the `maintitle relatedtype`, citing it actually cites one volume of it, the one represented by `plato:tomeiv` in the `related` field. This indirectness allows you to present such a citation using the `maintitle-first` syntax envisaged by the *Manual*. The `plato:timaeus:gr` entry cites one part of this volume using the same syntax. The `hidevolumes=false` setting in the `options` field means that citations will include the total number of volumes as well as the specific volume number.

`[plato:timaeus:gr]` This, `plato:tomeiv`, and `plato:total` provide an example of how to cite a single work from within one volume of a multi-volume set when you want the multi-volume title (MVBBook title) to appear before the title of the individual volume (Book title). A chain of three entries, connected by two `related` fields with `maintitle relatedtype`, means that when you cite `plato:timaeus:gr` you create a single reference containing all the information in the proper order. Biblatex-chicago automatically sets the `related` option to `true` for this `relatedtype`, so you'll see all the relevant data both in notes and in the bibliography.

Citation commands

Although `\autocite` will no doubt be the most commonly used citation command, `biblatex-chicago`, following `biblatex`, does provide a range of other commands for more specialized usages. We have already seen `\headlesscite`,¹ which allows you to avoid, in notes, repetition of an author's name when it appears in the title as well. We have also seen `\fullcite`,² to guarantee a long note, and `\shortcite`,³ to guarantee a short one. (You can also use `\footfullcite` to get a `\fullcite` in a footnote.) There are a few others that may occasionally be useful: `\surnamecite`,⁴ for when a note follows a discussion where the presence of the authors' (or editors', etc.) full names makes their full repetition in the note unnecessary; `\citejournal`,⁵ which provides an alternative short form when citing Articles; and the standard `\textcite`, which inserts the name of an author or other Contributor⁶ into the flow of text, with a footnote below.

§ 4.3.2

In conclusion

Allow me, finally, to emphasize just how multifarious are the sources illustrated in the *CMS*, only a small selection of which have appeared in this introduction. You will find significantly fuller guidance in `biblatex.pdf` and `biblatex-chicago.pdf`, but the *CMS* itself defines the specification and shall arbitrate all disputes. If you see something in `biblatex-chicago` that looks wrong to you, or if the documentation has left you perplexed, please let me know.

References

University of Chicago Press. *The Chicago Manual of Style*. 17th ed. Chicago: University of Chicago Press, 2017.

[`chicago:manual`] A manual presented in a Book entry. Note curly braces around corporate author, which is printed twice, both as author and publisher.

1. George Creel to Colonel House, 25 September 1918, Edward M. House Papers, Yale University Library.
2. Library of Congress, "American Leaders Speak: Recordings from World War I and the 1920 Election, 1918–1920," RealAudio and WAV formats, <http://memory.loc.gov/ammem/nfhtml/nforSpeakers01.html>.
3. Coolidge, "Equal Rights."
4. Harley and Woodward, eds., *The History of Cartography*, 3 vols. (Chicago: University of Chicago Press, 1987–).
5. *Lake Forester*, March 23, 2000.
6. Anna Contributor, "Contribution," in *Edited Volume*, ed. Ellen Editor (Place: Publisher, forthcoming).

The Database File

%% Database entries used to produce
%% citations in this file, taken
%% from notes-test.bib. I have
%% removed the annotations to save
%% room -- they can be viewed in the
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organization = {Yale University Library}
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@MVBook{plato:total,
author = {Plato},
title = {Opera},
year = 1902,
related = {plato:tomeiv},
editor = {Burnet, J.},
relatedtype = {maintitle},
volumes = 5,
options = {hidevolumes=false},
series = {Oxford Classical Texts},
publisher = {Clarendon Press},
location = {Oxford}
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@SuppBook{polakow:afterw,
author = {Polakow, Valerie},
title = {Lives on the Edge},
subtitle = {Single Mothers and Their
Children in the Other America},

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pages = {175--184},
afterword = {yes},
year = 1993,
publisher = uchp,
location = {Chicago}
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@Online{pollan:plant,
author = {Pollan, Michael},
title = {Michael Pollan Gives a Plant's-Eye
View},
organization = {TED video, 17:31},
titleaddon = {filmed March 2007},
url = {http://www.ted.com/index.php
/talks/michael_pollan_gives_a
_plant_s_eye_view.html},
urldate = {2008-02},
userd = {posted}
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@Online{powell:email,
author = {Powell, John},
date = {1998-04-23},
titleaddon = {Grapevine digest mailing list
archives},
organization = {Electric Editors},
title = {Pattern Matching},
url = {http://www.electriceditors.net
/grapevine/archives.php},
shorttitle = {\autocap{e}-mail to Grapevine
mailing list}
}

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@Collection{prairie:state,
title = {Prairie State},
subtitle = {Impressions of Illinois,
1673--1967, by Travelers and Other
Observers},
year = 1968,
editor = {Angle, Paul~M.},
publisher = uchp,
location = {Chicago}
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@Review{ratliff:review,
author = {Ratliff, Ben},
title = {\bibstring{reviewof}
\mkbibemph{The Mystery of
Samba: Popular Music and
National Identity in Brazil},
\bibstring{by} Hermano Vianna,
\parteditandtrans John Charles
Chasteen},
journaltitle = {Lingua Franca},
date = {1999-04},
volume = 9,
pages = {B13--B14},
shorttitle = {\bibstring{reviewof}
\mkbibemph{The Mystery of Samba}}
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@MastersThesis{ross:thesis,
author = {Ross, Dorothy},
title = {The Irish-Catholic Immigrant,
1880--1900},

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  subtitle = {A Study in Social Mobility},
  school = {Columbia University},
  year = {\bibstring{nodate}}
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  date = 1895,
  shorttitle = {Das Wandern},
  booktitle = {Die sch\one M\ullerin (The
    Maid of the Mill)},
  maintitle = {First Vocal Album},
  maintitleaddon = {(for high voice)},
  options = {ctitleaddon=space},
  author = {Schubert, Franz},
  publisher = {G.~Schirmer},
  address = {New York}
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@Online{souza:obama,
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  title = {President Obama bids farewell
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    conclusion of the Nuclear
    Security Summit},
  date = {2016-04-01},
  shorttitle = {President Obama},
  nameaddon = {(@petesouza)},
  url = {https://www.instagram.com/p
    /BDrmfXTtNCt/},
  organization = {Instagram photo}
}
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@Online{stenger:privacy,
  organization = {CNN.com},
  date = {1999-12-20},
  author = {Stenger, Richard},
  title = {Tiny Human-Borne Monitoring
    Device Sparks Privacy Fears},
  url = {http://www.cnn.com/1999/TECH/
    ptech/12/20/implant.device/},
  shorttitle = {Tiny Human-Borne Monitoring
    Device}
}
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@InReference{wikiped:bibtex,
  title = {Wikipedia},
  lista = {BibTeX},
  entrysubtype = {online},
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  urldate = {2019-11-15T20:59:00},
  userd = {last edited}
}
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