Windy City

A Chicago Style for \biblatex

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1. Introduction

Windy City is a style for \texttt{biblatex} that formats notes, bibliographies, parenthetical citations, and reference lists according to the 17th edition of \textit{The Chicago Manual of Style (CMOS)}\textsuperscript{1}. It accurately handles a wide range of citations in different formats and includes a set of options and commands to support special circumstances. It also has extensive support for citing and arranging different kinds of editors and translators within a single citation. These features make Windy City especially suitable for academic work.

The following sections assume familiarity with \textit{CMOS} and \texttt{biblatex}. Section 2 gives a brief overview of the style’s features. Section 3 discusses the assignment and placement of editors and translators. Section 4 discusses several issues with collections, including options for formatting citations of individual volumes. Sections 5 and 6 reproduce examples from \textit{CMOS} chapters 14 and 15, respectively, with occasional commentary and references to other sections.

Windy City requires \texttt{biblatex} version 3.13 or later.

2. Overview

This section covers basic information about Windy City. If you’re completely new to \texttt{biblatex}, you should probably glance at its documentation. For the impatient, examples in sections 2.2, 2.3, 5, and 6 might be of more immediate interest.
2.1 Getting Started

If you already know how to use \texttt{biblatex}, getting started with Windy City is easy. First, confirm that \texttt{biblatex} and Windy City are installed properly on your system. Since both are included in some distributions of \LaTeX, you might already have them.

Either way, please consider downloading the most recent release of Windy City from its home on \texttt{CTAN} or repository on \texttt{GitHub}. More recent but potentially less reliable updates are available on the main project page.

Windy City consists of four files:

- \texttt{windycity.bbx}
- \texttt{windycity.cbx}
- \texttt{windycity.dbx}
- \texttt{american-windycity.lbx}

If you need to install Windy City on your system, you have several options. For a one-off compilation, say, to give Windy City a trial run on a single document, you could copy Windy City’s files to the document’s root directory. Beyond that, your best option is to install it in your local \texttt{texmf}. Copy the files to a directory of your choosing, then update your \texttt{texmf} file name database.

To compile a document with Windy City, tell \texttt{biblatex} to load it with the load-time option \texttt{style}:

\begin{verbatim}
\usepackage[style=windycity]{biblatex}
\end{verbatim}

Typically, this goes in a document’s preamble or in one of its style files.

The localization file \texttt{american-windycity.lbx} is responsible for Windy City’s American-style punctuation and dates and many of the bibliography strings that print in citations, such as \textit{edited by}. Windy City loads this file if \texttt{biblatex} determines that your document’s language is English—either due to settings in \texttt{babel} or \texttt{polyglossia} or because neither \texttt{babel} nor \texttt{polyglossia} has been loaded. You can prevent Windy City from loading \texttt{american-windycity.lbx} by commenting the following line in \texttt{windycity.bbx}:

\begin{verbatim}
\DeclareLanguageMapping{english}{american-windycity}
\end{verbatim}

If you wish to use Windy City with a language other than English, set it accordingly with \texttt{babel} or \texttt{polyglossia} before loading \texttt{biblatex}. Windy City will then try to load \texttt{<language>-windycity.lbx} and, if it’s available, use it to override any other localization files that were loaded. This allows you to make your own localization files for Windy City without needing to edit other files. For example, if you load
babel with option german, Windy City will try to load german-windycity.lbx. If it’s available, it will override any other localization files that were loaded, including biblatex’s own german.lbx.

For some entries in your bibliography database, you may need to add fields or make other adjustments to get the right output. But since Windy City relies as much as possible on standard \LaTeX fields, and secondarily on biblatex fields, you may not need to make major changes. The examples in this document and its accompanying bibliography database, windycity.bib, should serve as a guide for how to manage your input for nearly every circumstance that the style is meant to handle.

## 2.2 Standard Citations

For a first set of examples, consider this passage from CMOS 14.30:

4. Morley, Poverty and Inequality, 43.

A work’s first citation is similar to its entry in the bibliography. It includes all or most of its bibliographic information. Subsequent citations are shorter, usually consisting of a short form of the author’s name and a short form of the work’s title.

Windy City supports variations on this format. For information on short citations, including the use of ibid., see section 2.3. For options to skip parts of citations, change the order of editors and translators, and more, see sections 2.4 and 2.5. For parenthetical citations, see section 6.

The block below shows Windy City’s default bibliography for the previously cited works:


You may also print a bibliography in the author-date format (what CMOS calls a reference list). The key difference is the placement of the publication date after the author’s name:
2.3 Short Citations


To make `\printbibliography` use the author-date format, load *biblatex* with Windy City’s preamble option `reflist`:

```latex
\usepackage[reflist,style=windycity]{biblatex}
```

Alternatively:

```latex
\usepackage[reflist=true,style=windycity]{biblatex}
```

To use the author-date format on a case-by-case basis, run `\printbibliography` with an appropriate `env` option. With Windy City, a so-called “bib environment” must set the style’s internal `reflist` toggle to `true`. Windy City’s own such environment is called `reflist`. Use it as follows:

```latex
\printbibliography[env=reflist]
```

Unfortunately, while the `env` option allows for differently formatted bibliographies within the same document, the reference lists may have problems with sorting. (You’ll notice some in *References*, at the end of this document.) For best results, use the `reflist` preamble option.

As you proceed through this guide, note that all examples of citations and bibliographies are outputs of the style from commands that you can inspect in the document’s source, `windycity.tex`, and in its style file, `windycity.sty`. Almost all citations are from `\cite` or `\parencite`. A few are from more specialized commands, such as `\cite*` or `\cites`. All example bibliographies are outputs of the style from `\printbibliography`. All bibliographic data reside in `windycity.bib`.

### 2.3 Short Citations

Standard citations may take a variety of shorter forms. Windy City offers several preamble options and other means for producing them.

Let’s start with another passage of default output:


A shorter form of this passage appears in *CMOS 14.34:*²

2. Ibid., 18.
3. Ibid., 18.

In this version, a work’s first citation gives short names and titles and omits all other publication information. Consecutive citations of a work may omit the title or, as in the eleventh note, the author’s name. For citations in this form, use the preamble option `short`. See section 2.4 for more information.

*CMOS 14.34* also shows how to render the passage with *ibid.* Unlike previous editions of *CMOS*, the 17th edition discourages its use. Windy City makes it available with the preamble option *ibid* (see section 2.4). Options `short` and *ibid* together give the following:³

2. Ibid., 18.
3. Ibid.

---

² Switching forms within a document isn’t a feature of the style. For demonstration purposes, though, it’s possible.

³ As explained in section 2.4, Windy City won’t print *ibid.* in reference to a citation on a previous page. A page break here may affect the output.
2.4 Preamble Options

For a compromise between standard and short forms, try the preamble option \texttt{shortfirst}. It swaps long first citations for short ones but otherwise follows the standard form (see section 2.4). For another variant, try \texttt{shortafter}, which gives the same output as \texttt{short} but with long first citations. Also with standard citations, the preamble option \texttt{idemtracker} shortens the author’s name of a work’s first citation if the previous citation is of the same author (see section 2.4). The entry option \texttt{noauth} omits the author’s name altogether (see section 2.5). And the \texttt{shorthand} field allows you to set an abbreviation to stand in place of the author’s name, the work’s title, and other elements of a citation (see sections 8.2 and 14.59).

2.4 Preamble Options

A preamble option is an argument for the \texttt{usepackage} macro that loads \texttt{biblatex}. Preamble options affect the format of notes, bibliographies, and reference lists. Windy City relies on many preamble options from \texttt{biblatex} and supports or provides others to allow you to change the default output.

Many options below are \texttt{false} by default. Make an option \texttt{true} by passing its name to \texttt{biblatex}, with or without \texttt{=true}. Using \texttt{annotate} as an example, the following are equivalent:

\begin{verbatim}
\usepackage[annotate,style=windycity]{biblatex}
\usepackage[annotate=true,style=windycity]{biblatex}
\end{verbatim}

If an option is \texttt{true} by default, make it \texttt{false} by passing its name with \texttt{=false}. Using \texttt{doi} as an example:

\begin{verbatim}
\usepackage[doi=false,style=windycity]{biblatex}
\end{verbatim}

\begin{itemize}
\item \texttt{annotate=true, false} \hspace{2cm} default: \texttt{false}
\end{itemize}

This option is for printing annotated bibliographies. Annotations print in block paragraphs below entries. To change the spacing between entries and annotations, change the value of \texttt{bibitemsep}. Save an annotation in the \texttt{annotation} field of a work’s bibliography database entry.
2.4 Preamble Options

collsonly=true, false  
default: false

Citing individual works of a collection adds entries for those works to the bibliography. To exclude them and print only an entry for the whole collection, use collsonly. It has no effect on many incollection entries, such as articles in books, but it does filter out chapters of books, books in books, and volumes of collections. For discussion of multivolume works, see section 4.2.

dashed=true, false  
default: true

Set false to remove the 3-em dash for repeated names in bibliographies.

doi=true, false  
default: true

Set false to prevent the doi field from printing.

eprint=true, false  
default: true

Set false to prevent the eprint field from printing. For more information about eprints, see section 2.8.

ibid=true, false  
default: false

This option controls whether consecutive citations of a work on the same page receive an ibid. For examples, see section 2.3 and CMOS 14.34. As of the 17th edition, CMOS discourages the use of ibid.

ibidpage=true, false  
default: false

If true, the postnote field won’t print if the previous citation on the page is of the same entry with the same postnote. The ibid preamble option uses ibidpage.

idemtracker=true, false, context, strict, constrict  
default: false

If true, the first citation of a work prints with a shortened author’s name if the previous citation is of another work by the same author.

Recall CMOS 14.34, where the first citation of Toni Morrison’s Song of Solomon immediately follows citations of her Beloved. The default output prints her full name twice, once for the first citation of Song of Solomon and again for the first citation of Beloved. If idemtracker is true (or in many contexts any value other than false), her full name prints just once, at the beginning of the series.

For more information on idemtracker, see the discussion in biblatex’s user guide.

isbn=true, false  
default: false

Use this option to print ISBNs in bibliographies. A work’s ISBN goes in the isbn field of its bibliography database entry. With this option, the style prints ISBNs at the end of every entry in the bibliography, before annotations. To print the ISBN of a particular work, use the isbn entry option.
2.4 Preamble Options

issn=true, false  
default: false

Similar to isbn but for ISSNs.

library=true, false  
default: false

Like isbn and issn, this option prints the library field of every work in the bibliography. Use it to print information about libraries, call numbers, and the like. If you use it with the isbn and annotation options, it prints after the former but before the latter. To print this information for selected works, use the library entry option.

nolos=true, false  
default: false

By default, every work with a shorthand receives an entry in the bibliography. If you wish to exclude them, say, to avoid duplication with the output of `printshorthands`, use nolos. Since collsonly also excludes works from the bibliography, their results may overlap.

nopages=true, false  
default: false

On the first citation of article or review entries (and their aliases), Windy City prints the pages field if the postnote field is blank. This lets you cite the entirety of a work without having to duplicate the content of the pages field in the postnote. To override this feature, use nopages.

reflist=true, false  
default: false

Use this option to print a bibliography in the author-date format (what CMOS calls a reference list). If you use parenthetical citations, consider using reflist to maintain consistency with CMOS. Again, another way to print a reference list is to pass env=reflist to `\printbibliography`. See section 2 for more information.

short=true, false  
default: false

As shown in section 2.3, this option prints short citations (see CMOS 14.34). The use of short has one feature in common with ibid: It affects only consecutive citations of a work on the same page. As with ibid, this feature isn’t required by CMOS, but it prevents readers from having to look at another page to find the title of a citation.

In contexts where short would drop a title from a citation, but where no name occupies the author’s position, it prints the work’s labeltitle. This can be a short form of the title, either the title minus the subtitle or the content of the shorttitle field, if available.

As noted earlier, short has the same effect on first citations as shortfirst. But recall from section 2.3 that you can combine short and ibid for more concise output.

shortafter=true, false  
default: false

If you want the output of short but with long first citations, use shortafter. Compare the following with examples in CMOS 14.34:

**shortfirst**=true, false  
(default: false)

Use this option to shorten a work’s first citation. The resulting output consists mainly of the author’s name and the work’s title. According to *CMOS*, this approach is optional for documents with complete bibliographies. (See *CMOS* 14.23, also 14.29–14.36.) As with *short*, you may use *shortfirst* with *ibid* for more concise citations.

**shortlinks**=true, false  
(default: false)

If you use Windy City with *hyperref*, citations contain embedded links to their respective entries in the bibliography. In standard citations, these links encompass the entire citation (minus some punctuation). With *shortlinks*, they’re embedded in just one element: the title or, if no title is present, whatever part of the citation occupies the author’s position, such as the author’s name, *ibid*., or a shorthand. For comparison, the blue text below shows default links:


And here they are with *shortlinks*:

2.5 Entry Options

An entry option goes in the options field of a work’s database entry. It affects the format of that work. For options that affect the format of every work, see section 2.4.

As with preamble options, many options below are false by default. Make an option true by putting its name in the options field of a work’s bibliography database entry, with or without =true. Using annotate as an example, the following are equivalent:

\texttt{options = \{annotate\}},
\texttt{options = \{annotate=true\}},

If an option is true by default, make it false by putting its name with =false in the options field. Using doi as an example:

\texttt{options = \{doi=false\}},

\texttt{annotate=true, false} \hspace{1cm} \texttt{default: false}

Set true to print an entry’s annotation field. To change the spacing between entries and annotations, change the value of `\bibitemsep`.

\texttt{doi=true, false} \hspace{1cm} \texttt{default: true}

Set false to prevent the doi field from printing.

\texttt{swapvol=true, false} \hspace{1cm} \texttt{default: false}

In bibliographies and long citations, works in collections may place publication information for the volume before that of the collection or vice versa. Windy City gives priority to the volume. To reverse this for all relevant citations, use swapvol. For more information, see section 4.1.

\texttt{url=true, false} \hspace{1cm} \texttt{default: true}

Set false to prevent the url field from printing.
2.5 Entry Options

eprint=true, false
default: true

Set false to prevent the eprint field from printing. For more information about eprints, see section 2.8.

isbn=true, false
default: false

Use this option to print the ISBN of a particular work in a bibliography. The ISBN appears at the end of the work’s entry (if applicable, before an annotation). To print ISBNs of every work in the bibliography, see the isbn preamble option.

issn=true, false
default: false

Similar to isbn but for ISSNs.

library=true, false
default: false

This option prints the library field of a work’s bibliography database entry. This information prints at the end of the work’s entry (if applicable, after an ISBN and before an annotation). To print the library field of every work in the bibliography, use the library preamble option.

listvols=true, false
default: false

CMOS offers some flexibility over whether a long citation gives a work’s total number of volumes (see CMOS 14.118). Windy City replicates this in a roundabout way: By default, it prints the volumes field in certain long citations only if the postnote field is empty. This does a better job of matching examples in CMOS than a simpler policy would. For the rest, use listvols. It prints the volumes field in those citations no matter what the postnote contains. For more information, see section 4.1.

noauth=true, false
default: false

This option tells the style to bypass the author’s position of a work in notes and bibliographies. Citations will begin with the title’s position. Below is an example from CMOS 14.105:


To bypass the author’s position in a single note, without affecting the bibliography, use starred versions of citation commands, such as cite*, footcite*, and parencite*.
2.5 Entry Options

noreprint = true, false  
default: false

This option helps if you need to indicate a work’s original year of publication with the origdate or origyear field but want to depart from the style’s usual output by excluding the reprint bibliography string. First, an example of the default output from CMOS 15.40 (in the author-year format):


Now, from the same section, an example that requires noreprint:


skipdate = true, false  
default: false

On rare occasions, you may need an entry in a reference list to skip the date. See section 2.7 for examples.

swapauth = true, false  
default: false

To swap the places of a book’s author with an editor or translator, use swapauth. This option works for book, bookinbook, collection, inbook, and incollection entry types. For more information, see section 3.2.

swaptrans = true, false  
default: false

According to CMOS, if a work has an editor and a translator, their names should appear in citations in the order in which they appear on the work’s title page (see CMOS 14.104). By default, the style lists editors first. The option swaptrans reverses this order: Their translators print first. If a work’s translators and editors are the same, swaptrans reverses their roles, say, from edited and translated by to translated and edited by. The same goes for compilers, expanders, revisers, and updaters—all of whom the style treats as specialized editors. For editors and translators of an issuetitle, maintitle, or series, see their respective options below. See also section 3.2.

swaptrans:book = true, false  
default: false

A short form of swaptrans:booktitle. See below.

swaptrans:bookbook = true, false  
default: false

A short form of swaptrans:bookbooktitle. See below.

swaptrans:bookbooktitle = true, false  
default: false

Like swaptrans but narrower in scope. It applies only to the editors and translators of a bookbooktitle (a double cross-referenced title). See section 3.2.
2.6 Citation Commands

Windy City supports most of the citation commands familiar from biblatex, plus a small set of custom commands for tricky situations.

2.6.1 Standard Citation Commands

The following list, though not exhaustive, shows the most important citation commands from biblatex that Windy City supports:

**swaptrans:booktitle**=true, false

Like swaptrans but narrower in scope. It applies only to the editors and translators of a booktitle (a cross-referenced title). See section 3.2.

**swaptrans:issue**=true, false

A short form of swaptrans:issuetitle. See below.

**swaptrans:issuetitle**=true, false

Like swaptrans but for editors and translators of an issuetitle.

**swaptrans:main**=true, false

A short form of swaptrans:maintitle. See below.

**swaptrans:maintitle**=true, false

Like swaptrans but for editors and translators of a maintitle.

**swaptrans:series**=true, false

Like swaptrans but for editors and translators of a series.

**swaptrans:title**=true, false

Like swaptrans but narrower in scope. It applies only to the editors and translators of a title, whereas swaptrans also affects those of a booktitle (a cross-referenced title) and a bookbooktitle (a double cross-referenced title). See section 3.2.

**swapvol**=true, false

As an entry option, swapvol does on a case-by-case basis what the swapvol preamble option does globally: When set to true, it changes the format of a work in a collection so that, in bibliographies and long citations, publication information for the collection precedes that of the volume. For more information, see section 4.1.

**url**=true, false

Set false to prevent the url field from printing.
contexts. In Windy City, equivalent to file that your document loaded with multiprenote — take comma-separated lists of entry keys, while allowing you to specify distinct prenote and postnote fields for each work.

New users should get comfortable with \cite and \footcite (for notes) and \parencite (for parenthetical citations). Their multicite forms—\cites, \footcites, and \parencites—take comma-separated lists of entry keys, while allowing you to specify distinct prenote and postnote fields for each work.

Use \nocite to add works to bibliographies even if you haven’t cited them in the text with citations commands. Use it with an asterisk to add every work in every bib file that your document loaded with \addbibresource or \bibliography.

Windy City sets the autocite preamble option to footnote, which makes \autocite equivalent to \smartcite. The latter runs different citation commands in different contexts. In Windy City, \smartcite is equivalent to \footcite in a document’s body.
2.6 Citation Commands

and \cite in footnotes and endnotes.\footnote{If you set the autocite preamble option to inline, \autocite is equivalent to \parencite. If you set it to plain, \autocite is equivalent to \cite.}

\cite*{⟨prenote⟩}{⟨postnote⟩}{⟨key⟩}

Use this command to cite a work without printing anything in the author’s position. It comes in handy when the context makes the author’s name clear. From CMOS 14.78:


\parencite*{⟨prenote⟩}{⟨postnote⟩}{⟨key⟩}

Like \parencite but suppresses the author’s position—useful in passages where the author receives explicit mention. Here’s an example from CMOS 15.25:

Fiorina et al. (2005) and Fischer and Hout (2006) reach more or less the same conclusions. In contrast, Abramowitz and Saunders (2005) suggest that the mass public is deeply divided between red states and blue states and between churchgoers and secular voters.

The source for the passage above contains:

\begin{quote}
Fiorina et al. \parencite{fiorina2005}... Fischer and Hout \parencite{fischer2006}... Abramowitz and Saunders \parencite{abramowitz2005}...
\end{quote}

\textcite{⟨prenote⟩}{⟨postnote⟩}{⟨key⟩}

Use \textcite for in-text citations. Here’s an example from CMOS 13.65:

“If an astronaut falls into a black hole, its mass will increase, but eventually the energy equivalent of that extra mass will be returned to the universe in the form of radiation. Thus, in a sense, the astronaut will be ‘recycled’” (Stephen W. Hawking, A Brief History of Time: From the Big Bang to Black Holes [New York: Bantam Books, 1988], 112).

\footnote{In a minipage environment, \smartcite is equivalent to \cite. To use \smartcite with endnotes, use the \endnotes package.}
The source for the passage above contains:

\begin{quote} ‘‘If an astronaut falls into a black hole...’’ \mkbibparens{\textcite[112]{hawking1988}}. \end{quote}

Note that \textcite doesn’t enclose citations in parentheses but does drop the final period that standard citations usually end with. The parentheses above come from \mkbibparens, which switches the note’s internal parentheses to brackets.

\textcite*[⟨prenote⟩][⟨postnote⟩]{⟨key⟩}

Like \textcite but suppresses the author’s position. From CMOS 13.65:

In their introduction to Democracy in America (Chicago: University of Chicago Press, 1999), translators Harvey Mansfield and Delba Winthrop write that Tocqueville “shows that the people are sovereign, whether through the Constitution or despite it, and he warns of the tyranny of the majority” (xvii).

The source for the passage above contains:

\begin{quote} In their introduction to \textcite*(tocqueville1999) ...\parencite[xvii]{tocqueville1999}. \end{quote}

2.6.2 Custom Commands: \idemcite

This family of citation commands isn’t strictly necessary but makes some citations simpler than they would be with standard commands.

\idemcite[⟨prenote⟩][⟨postnote⟩]{⟨key⟩}
\idemcites(⟨multiprenote⟩)(⟨multipostnote⟩)[⟨prenote⟩][⟨postnote⟩]{⟨key⟩}...[⟨prenote⟩][⟨postnote⟩]{⟨key⟩}
\footidemcite[⟨prenote⟩][⟨postnote⟩]{⟨key⟩}
\footidemcites(⟨multiprenote⟩)(⟨multipostnote⟩)[⟨prenote⟩][⟨postnote⟩]{⟨key⟩}...[⟨prenote⟩][⟨postnote⟩]{⟨key⟩}

Perhaps the best use case for these commands is the example in CMOS 14.57. The sources mentioned in a passage receive long citations with shortened names:

Only when we gather the work of several scholars—Walter Sutton’s explanations of some of Whitman’s shorter poems; Paul Fussell’s careful study of structure in “Cradle”; S. K. Coffman’s close readings of “Crossing Brooklyn Ferry” and “Passage to India”; and the attempts of Thomas I. Rountree and John Lovell, dealing with “Song of Myself” and “Passage to India,” respectively, to elucidate the strategy in “indirection”—do we begin to get a sense of both the extent and the specificity of Whitman’s forms.

Without commands like *idemcite*, there’s often no easy way to tell Windy City to shorten names. The preamble option *idemtracker* helps with consecutive citations of the same author, but that’s no use when you want to shorten names because you’ve mentioned them in the text.

Nevertheless, standard commands can reproduce the example in at least three ways:

\footnote{\cites*{Sutton,}[][sutton1959][Fussell,][fussell1962]...}
\footcites*{Sutton,}[sutton1959][Fussell,][fussell1962]...
\footnote{Sutton, \cite*{sutton1959}; Fussell, \cite*{fussell1962}...}

They’re ugly workarounds, exploiting starred citations commands to suppress the author’s position while you add names manually—but they do work.

With *idemcites* and *footidemcites*, on the other hand, you have simpler alternatives that make your intentions clearer and your file easier to read:

\footnote{idemcites{sutton1959,fussell1962,...}[and][lovel1960]}
\footidemcites{sutton1959,fussell1962,...}[and][lovel1960]
\footnote{idemcite{sutton1959}; ... and idemcite{lovel1960}}

Notice that the only reason to use *footidemcites* rather than *footidemcite* is to insert *and* before the last citation.

### 2.6.3 Custom Commands: parenauth

You may prefer to omit the year from parenthetical citations if the context makes it clear or if the inclusion of *n.d.* (for no date) seems unnecessary. Omit the year with *parenauth* and *parenauths*.

\parenauth[⟨prenote⟩][⟨postnote⟩]{⟨key⟩}
\parenauths(⟨multiprenote⟩)(⟨multipostnote⟩)[⟨prenote⟩][⟨postnote⟩]{⟨key⟩}...[⟨prenote⟩][⟨postnote⟩]{⟨key⟩}
As with `\parencite*` and `\parencites*`, use these commands with care. Dropping the year from parenthetical citations could result in bad output, such as empty parentheses or ambiguous references.

For an example, see CMOS 15.54.

### 2.7 Entry Types

Windy City recognizes every entry type from BibTeX, as well as some that are specific to biblatex.

- **article** Alias: `periodical`
- **book** Aliases: `booklet`, `collection`, `manual`, `mvbook`, `mvcollection`, `proceedings`, `report`, `techreport`
- **incollection** Aliases: `bookinbook`, `conference`, `inproceedings`, `inbook`, `letter`, `suppbook`, `suppcollection`
- **letter** No aliases
- **misc** No aliases
- **online** No aliases
- **patent** No aliases
- **reference** Alias: `inreference`
- **review** No aliases
- **thesis** Aliases: `mastersthesis`, `phdthesis`
- **unpublished**

For the most part, you may assign every work to the basic entry types listed above. A PhD thesis, for example, may have a `thesis` or `phdthesis` entry type. The output is the same. If an entry has a type other than the ones listed above, Windy City processes it as a book.

One comment about `reference` and `inreference` entries: You may cross-reference `inreference` entries to `reference` entries, as with articles in books, but you can get the same output with one or the other alone. Take an example from CMOS 14.232:


A bibliography database could have an `inreference` entry for the article cross-referenced to a `reference` entry for *Encyclopaedia Britannica*:
This approach makes sense if you plan to cite more than one article from the source. But you could also have a single entry of either type with the same data:

```
@Reference{salvation1980,
    organization = {{\emph{Encyclopaedia Britannica}}},
    edition = {15},
    title = {salvation},
    year = {1980}
}
```

For unusually complicated citations, or those just not supported by the style, consider using the `misc` entry type. The style handles these entries in a way that makes it a fallback for almost anything. The example below is from *CMOS* 14.264:


This work’s database entry contains most of its information in `usera` (for notes) and `userb` (for bibliographies). The `title` field needs manual formatting, since works of this type may have titles in italics or quotation marks.

```
@Misc{roosevelt1959,
    author = {Roosevelt, Eleanor},
    title = {{\mkbibquote{Is America Facing World Leadership?}}},
    usera = {convocation speech, Ball State Teacher’s College, May 6, \thefield{year}, radio broadcast, reel-to-reel tape, MPEG copy, 1:12:49},
```

---

5. Incidentally, reference works don’t always have titles in italics. As a result, you need to set italics in your bibliography database.
You may also use the `misc` entry type to cross-reference entries in a bibliography, as in CMOS 14.81 and 14.82.

Morton, Anthony. See Creasey, John.
York, Jeremy. See Creasey, John.

Here’s the `misc` entry for one of the cross-references above:

```latex
@Misc{ashe,
    options = {skipdate},
    author = {Ashe, Gordon},
    userb = {\emph{See} Creasey, John}
}
```

The option `skipdate` is necessary only if you plan to format your bibliography as a reference list. It prevents Windy City from printing `n.d. (no date)` after the name to indicate a missing publication date. After adding the `misc` entries, use `\nocite` with their entry keys to add them to your bibliography, and cite the remaining entries as usual. For examples of automatic cross-referencing in notes and bibliographies see section 5 (14.108), section 6 (15.42), and section 4.

For more discussion of entry types, see section 2.8.

## 2.8 Data Fields

Windy City relies on a small number of data fields that aren’t recognized by BibTeX or biblatex. It also uses some standard ones in perhaps unexpected ways.

### 2.8.1 Standard Data Fields

Examples in this document don’t always make it clear how Windy City uses standard data fields. The list below highlights a selection of fields that merit special attention.
2.8 Data Fields

**authortype** This field takes three values: *anon* (to print an anonymous author’s name in brackets), *anon?* (to add a question mark inside the brackets), and *pseudo* (to print *pseud.* in brackets after the name of a pseudonymous author). From *CMOS* 14.79:

1. [Samuel Horsley], *On the Prosodies of the Greek and Latin Languages* (London, 1796).


For pseudonymous authors, another solution is to use the *nameaddon* field. Unlike with *authortype*, *nameaddon* allows you to include an author’s given name in the brackets. For examples, see *CMOS* 14.81.

**collection** Use this field with *unpublished* works for names of manuscript collections. See examples in *CMOS* 14.222, 14.229, and 14.230.

**edition** To indicate a numbered edition of a work, put the edition’s number in this field—for example, 2 for a second edition. To indicate a revised edition, enter either *revised* or *rev. ed*. Both options give the same output. For expanded and updated editions, you may use *expanded* or *updated*. Add additional data as necessary. In the following example from *CMOS* bibliography 2.4, *edition* contains *updated edition by Arlene O'Sean and Antoinette Schleyer*:


You may also use the field to indicate a newspaper’s edition, such as *Sunday Book Review* (see *CMOS* 14.202).

**eprint** Windy City supports the built-in resources that *biblatex* provides for electronic publishing information, even though the output doesn’t conform to *CMOS*. To that end, you may use the *eprint* field, along with its cousins *eprinttype* and *eprintclass*, and associated options (*eprint*, *doi*, and *url*), all of which are set to *true* by default.

**issue** Windy City uses this field with *article*, *online*, and *review* entry types (and their aliases) to record a work’s season of publication (spring, summer, autumn/fall, winter). The *date* field also records seasons—but the value 23, for the third season, returns *Autumn*. To print *Fall*, use the *issue* field. In other words, for *Fall* 2013, a work’s bibliography database entry should contain:

```
issue = {Fall},
date = {2013},
```
Whereas for Autumn 2013, use either:

```
date = {2013-23},
```

Or:

```
issue = {Autumn},
date = {2013},
```

Note that when date contains just a year of publication, you may use the classic year field.

**pages** See comments on the nopages preamble option in section 2.4.

**pubstate** This field indicates when a work is forthcoming (with value forthcoming), a preprint (with value preprint), a working paper (with value working), or an electronic article published ahead of the official publication date (with value prepub). A preprint or working paper needs an unpublished entry in your bibliography database (see CMOS 14.173 and 14.218). A prepublication should have an article or periodical entry (see CMOS 14.172). For forthcoming works, see CMOS 14.146, 14.172, and 15.45. Forthcoming works also print correctly with forthcoming in the year field.


**series** See comments on seriesaddon in section 2.8.

**shortcollection** Similar to shorttitle but for the short name of a collection.

**titleaddon** Like nameaddon, this field encloses its content in brackets. This is especially useful for translated titles. From CMOS 14.99:

1. Henryk Wereszycki, Koniec sojuszu trzech cesarzy [The end of the Three Emperors’ League] (Warsaw: PWN, 1977); includes a summary in German.


**type** With the *thesis* entry type, Windy City uses *type* to distinguish a Master’s thesis from a PhD dissertation. For the latter, *type* should have the value *phdthesis* or *PhD diss*. For the former, use *mathesis* or *master’s thesis*. Indicate other types of thesis by entering the appropriate value in the field, such as *bachelor’s thesis* or *undergraduate thesis*. No *type* field is needed for the *mathesis* and *phdthesis* entry types.

In rare cases, *type* is necessary for *article* and *review* entry types (and their aliases) when a work’s bibliographic information doesn’t allow Windy City to distinguish a journal article from a magazine or newspaper article. This happens when a magazine or newspaper article has an issue number. Normally, Windy City prints an issue number before the date and encloses the date in parentheses. But for magazine and newspaper articles, the issue number should go first, and the date shouldn’t be in parentheses. The workaround is to include a *type* field with the value *news-mag*. For an example, see *CMOS* 14.204 and compare it with the citation of Beattie in 14.171.

**typeaddon** In bibliography entries of *unpublished* works, this field adds arbitrary content after the *type* field. To replicate examples in *CMOS* 14.217, use *typeaddon* with the value *presented at the*:


For *CMOS* 14.216, *typeaddon* contains *last modified*, preceded by a comma and a space:


2.8.2 Other Data Fields

Some of Windy City’s nonstandard data fields are for its internal handling of cross-referencing. Those fields aren’t listed below, as they’re not usually meant for use in a bibliography database (but see section ??). The rest store information that’s
3. Editors and Translators

Windy City offers significant control over the handling of editors and translators. Taking advantage of it, however, may not seem intuitive at first. This section covers all the relevant features and options.

3.1 Types of Editors and Translators

Windy City has four name lists for editors (editor, editora, editorb, and editorc) and three name lists for translators (translator, translatora, and translatorb). At points

crucial for correct formatting. Without them, quite a few citations in this document wouldn’t match their counterparts in *CMOS*.

**blogtitle** The name of a blog goes in blogtitle and blogsubtitle. Keep in mind that blog posts take the usual title and subtitle fields.

**editoraddon** This field holds editorial information about a work that belongs immediately after editor has printed, without intervening punctuation. For an example, see *CMOS* 14.105, where the citation of Chaucer Life-Records includes: “from materials compiled by John M. Manly and Edith Richert, with the assistance of Lilian J. Redstone et al.” This field doesn’t print when editor prints in the author’s position. As a result, options that may affect where editor prints, such as swaptrans and swapauth, may affect whether editoraddon prints.

**seriesaddon** This field is for additional information about a book’s series. That includes information about the run of a series, such as 2nd ser. and n.s. For examples, see *CMOS* 14.123 and 14.126. Keep in mind that, for journals, which occasionally have a series but no series name, information like 2nd ser. and n.s. go in the series field.

**shorthand** Windy City doesn’t automatically italicize a shorthand. Per *CMOS* 14.60, a shorthand should be italicized if the title that it abbreviates is italicized. Set it in the bibliography database with `emph` or `mkbibemph`. For examples of a shorthand, see section 14.59 and the first citation of *CMOS* in this document’s introduction.

**shorthandintro** You may override the default announcement of a shorthand by adding your preferred content to shorthandintro. See the first citation of *CMOS* in this document’s introduction, where the announcement isn’t a note in parentheses but its own sentence.

**shortmaintitle** This field contains the short form of a maintitle. It should only be necessary for certain works in collections. See the citation of The Complete Tales of Henry James in section 4.2.
where it’s prepared to print them, it cycles through one or both sets of lists, depending on the context, looking for names to print. The set of editors starts with editor, followed by editora, and so on. The set of translators starts with translator, followed by translatora, and so on. Editors precede translators, unless you reverse the order with a swaptrans entry option (see section 3.2). Within each set, the style prints the first name list that meets its criteria for that context. Apart from exceptions discussed below, you can assign any editor or translator name list to any title, issuetitle, maintitle, or series.

3.1.1 The Basics

In most cases, you’ll assign editors and translators to a title. Since it’s the default assignment, you can do this just by adding the editor and translator fields to a database entry. The entry below is an example from CMOS 14.104:

```latex
@Collection{adorno1999,
  author = {Adorno, Theodor W. and Benjamin, Walter},
  title = {The Complete Correspondence, 1928–1940},
  editor = {Lonitz, Henri},
  translator = {Walker, Nicholas},
  address = {Cambridge, MA},
  publisher = {Harvard University Press},
  year = {1999}
}
```


When the style processes this entry, it identifies the editor and translator of the work with the names in the editor and translator fields. Since the entry doesn’t use swaptrans, the resulting output lists the editor and translator, in that order, after the authors and title.

Cross-referencing introduces a bit more complexity, but the principle is the same: Within the scope of an entry, the style associates editor and translator with title. In this example from CMOS 14.30, an essay is cross-referenced to a collection:
3.1 Types of Editors and Translators

@InCollection{kaiser1964,
    author = {Kaiser, Ernest},
    title = {The Literature of Harlem},
    shorttitle = {Literature of Harlem},
    crossref = {clarke1964}
}
@Collection{clarke1964,
    editor = {Clarke, J. H.},
    title = {Harlem},
    subtitle = {A Community in Transition},
    address = {New York},
    publisher = {Citadel Press},
    year = {1964}
}


Since *editor* appears within the *collection* entry, Windy City associates the editor’s name with *Harlem*. If you moved *editor* from *collection* to *incollection*, the association would change to *The Literature of Harlem*.

Consider another example:


Hans Nachod translated “The Ascent of Mont Ventoux,” among other works in the collection, but not *every* work in the collection. Thus, the *translator* field must fall within the scope of the *incollection* entry:

@InCollection{petrarca1948,
    author = {Petrarca, Francesco},
    title = {The Ascent of Mont Ventoux},
    translator = {Nachod, Hans},
    pages = {36–46},
}
By the same token, since editor falls within the scope of collection, the style associates it with The Renaissance Philosophy of Man, not “The Ascent of Mont Ventoux.”

Windy City supports a second tier of editors after title, issuetitle, maintitle, and series. Again, in your bibliography database, make sure to list editors in the proper order: editor before editora, and so on. Second tier editors never print in the author’s position, even when the first does. They always print after the relevant title.

In the examples below, the editors print correctly because there’s no ambiguity about which title they’re responsible for. Both fall within the same entry, carter2012, where their default assignment is A Performer’s Guide. Citing a child entry, myers2012, places the editors after the collection’s title, starting with editor, whereas citing the parent places editor in the author’s position and editora after the collection’s title.

3.1 Types of Editors and Translators


As the examples above also indicate, the style supports a variety of editorial roles beyond just editor and translator. They are: compiler, expander, reviser, and updater. To assign them, use the editor and translator type fields. Below are some bibliography database entries for examples in CMOS 14.103 and 14.142:

```ruby
@Book{schechter2011,  
editor = {Schechter, Harold, and Kurt Brown},  
etiptype = {compiler},  
title = {Killer Verse},  
subtitle = {Poems of Murder and Mayhem},  
address = {London},  
publisher = {Everyman Paperback Classics},  
year = {2011}
}
@Book{turabian2013,  
author = {Turabian, Kate L.},  
title = {A Manual for Writers of Term Papers, Theses, and Dissertations},  
edition = {8},  
editor = {Booth, Wayne C. and Colomb, Gregory G. and Williams, Joseph M. and {the University of Chicago Press Staff}},  
etiptype = {reviser},  
address = {Chicago},  
publisher = {University of Chicago Press},  
year = {2013}
}
```


3.1 Types of Editors and Translators

You may combine all six editorial roles in pairs. A work’s editor, for example, can also be its translator, compiler, expander, reviser, or updater—but no more than one of these. Simply put the proper value in the corresponding type field. We saw this with *A Performer’s Guide*, where the bibliography string `revex` identified Jeffery Kite-Powell as the work’s reviser and expander. These are the key lines:

```plaintext
ditora = {Kite-Powell, Jeffery},
editoratype = {revex},
```

Combinations that involve a translator’s role, such as *translated and compiled by*, respond to the `swaptrans` options discussed in section 3.2. For these dual roles, however, it’s probably less confusing in the long run to change values in the editor and translator type fields. The choice is yours. Table 1 lists all editor and translator roles.

<table>
<thead>
<tr>
<th><code>editortype</code> Assignment</th>
<th><code>editortype</code> Assignment</th>
</tr>
</thead>
<tbody>
<tr>
<td>compiler</td>
<td>reviser</td>
</tr>
<tr>
<td>comped</td>
<td>revcomp</td>
</tr>
<tr>
<td>compex</td>
<td>reved</td>
</tr>
<tr>
<td>comprev</td>
<td>revex</td>
</tr>
<tr>
<td>comptrans</td>
<td>revtrans</td>
</tr>
<tr>
<td>compup</td>
<td>revup</td>
</tr>
<tr>
<td>editor</td>
<td>translator</td>
</tr>
<tr>
<td>edcomp</td>
<td>transcomp</td>
</tr>
<tr>
<td>edex</td>
<td>transed</td>
</tr>
<tr>
<td>edrev</td>
<td>transrev</td>
</tr>
<tr>
<td>edtrans</td>
<td>transup</td>
</tr>
<tr>
<td>edup</td>
<td>updater</td>
</tr>
<tr>
<td>expander</td>
<td>upcomp</td>
</tr>
<tr>
<td>excomp</td>
<td>uped</td>
</tr>
<tr>
<td>exed</td>
<td>upex</td>
</tr>
<tr>
<td>exrev</td>
<td>uprev</td>
</tr>
<tr>
<td>extrans</td>
<td>uptrans</td>
</tr>
</tbody>
</table>

*Table 1*

For examples in *CMOS* that use values from Table 1, we need to turn to the book’s bibliography. The first example below shows the effect of `reved`, the second of `revup`.

3.1 Types of Editors and Translators

For editors and translators with more than two roles per title, you need to print more than one name list, either an editor name list and a translator name list or two editor names lists (see the previous discussion of second tier editors). This allows for complex assignments such as “Edited and Translated by Jane Doe. Revised and Updated by Jane Doe and John Smith.” What’s not allowed is listing three or more roles at once, as in “Edited, Translated, and Revised by Jane Doe.”

Along with the values in Table 1, you may also use anon, anon?, and pseudo in editor and translator type fields to indicate anonymous and pseudonymous editors and translators. For examples using these values with the authortype field, see section 8.1 and CMOS 14.79 and 15.34.

3.1.2 Other Options and Titles

Windy City simplifies the assignments of editors and translators in several ways. For one, the default assignment of every editor name list is editor, and the default assignment of every translator name list is translator. As a result, you never need to use the values editor or translator in the type fields. It’s strictly optional. The name fields alone set the correct assignment.

Much the same holds when the editor and translator of a work are the same. The usual way to set this assignment is with identical name lists:

```
editor = {Doe, Jane},
translator = {Doe, Jane},
```

This gives a default assignment of editor and translator (edtrans from Table 1), unless you use the appropriate swaptrans entry option, which gives translator and editor (transed from Table 1). No editor or translator type field is necessary.

When type fields are required, Windy City offers flexibility over how you structure your bibliography entries: If you like, you can set the assignment with just one editor or translator type field and its corresponding name field, or with both name fields and one type field, or with both name fields and both type fields. To set Jane Doe as the compiler and translator of a title, Windy City treats all five options below as equivalent:

1. editor = {Doe, Jane},
   edortype = {comptrans},
3.1 Types of Editors and Translators

2. translator = {Doe, Jane},
   translatortype = {comptrans},

3. editor = {Doe, Jane},
   translator = {Doe, Jane},
   editortype = {comptrans},

4. editor = {Doe, Jane},
   translator = {Doe, Jane},
   translatortype = {comptrans},

5. editor = {Doe, Jane},
   translator = {Doe, Jane},
   editortype = {comptrans},
   translatortype = {comptrans},

The last option above raises the possibility that editor and translator type fields may conflict. What if the editor type is comptrans and the translator type is something else, say, extrans? If the editors and translators are the same, but the type fields differ, Windy City reads the editor type field and ignores the translator type field.

Three more values for type fields allow you to assign editors and translators to issuetitle, maintitle, and series. Here’s an example from CMOS 14.123:

```latex
@Book{allen2009,
    author = {Allen, Judith A.},
    title = {The Feminism of Charlotte Perkins Gilman},
    subtitle = {Sexualities, Histories, Progressivism},
    series = {Women in Culture and Society},
    editor = {Stimpson, Catharine R.},
    editortype = {series},
    address = {Chicago},
    publisher = {University of Chicago Press},
    year = {2009}
}
```


If there were no editortype with the value series, the style would have assigned editor to title. The same goes for issuetitle and maintitle: Assign editors and translators to them by putting issuetitle and maintitle in the relevant type fields.
With the help of strings from Table 1, all editor and translator types are available to *issuettle*, *maintitle*, and *series*. Commas function as delimiters. To take the previous example, you could list Catharine Stimpson as the editor and compiler of the series by putting the values *series,edcomp* or *edcomp.series* in *editortype*.

Almost any entry that relies on cross-referencing can be written without it. Doing so, however, requires some fields in your bibliography database that are usually meant for the style’s internal use. These fields include *booktitle* (a cross-referenced *title*) and *bookbooktitle* (a double cross-referenced *title*—a *title* cross-referenced by a cross-referenced *title*). To accommodate entries that don’t use cross-referencing, the style accepts the values *booktitle* and *bookbooktitle* in editor and translator type fields. An example of double cross-referencing will set us up to use both:

```latex
@InCollection{doe2018,
  options = {swapvol},
  author = {Doe, Jane},
  title = {A Poem},
  translator = {Smith, John},
  pages = {56–57},
  crossref = {jones2018}
}
@InBook{jones2018,
  editor = {Jones, David},
  title = {A Volume of Poems},
  volume = {2},
  year = {2018},
  crossref = {white2016}
}
@Collection{white2016,
  editor = {White, Amy},
  title = {A Collection of Poems},
  volumes = {4},
  address = {Chicago},
  publisher = {University of Chicago Press},
  year = {2016–18}
}
```


The following alternative dispenses with *crossref* but needs two editor type fields, plus two other fields that don’t usually appear in bibliography databases: *bookvolume* (a cross-referenced *volume*) and *bookyear* (a cross-referenced *year*).

```latex
@InCollection{doe2018.alt,
  author = {Doe, Jane},
  title = {A Poem},
  translator = {Smith, John},
  pages = {56–57},
  booktitle = {A Volume of Poems},
  editor = {Jones, David},
  editortype = {booktitle},
  bookvolume = {2},
  year = {2018},
  bookbooktitle = {A Collection of Poems},
  editora = {White, Amy},
  editoratype = {bookbooktitle},
  volumes = {4},
  address = {Chicago},
  publisher = {University of Chicago Press},
  bookyear = {2016–18}
}
```


In short, for a title’s compilers, expanders, revisers, and updaters, and for any title other than *title*, you need to put the correct value of the assignment in the editor or translator type field that corresponds with the editor or translator name list (*editortype* for *editor*, *translatortype* for *translator*, and so on). Combined with Windy City’s support for citing articles, chapters, books, and other works within books, this scheme allows for several sets of editors per work.

### 3.2 Switching Places and Roles

According to *CMOS*, if a work has an editor and a translator, their names should appear in citations in the order in which they appear on the work’s title page (see *CMOS* 14.104). By default, the style lists editors first. To reverse the order, the style
provides a suite of entry options that apply to the editors and translators of different titles. This means that if a work has multiple sets of editors and translators, you may swap positions of any set without affecting the others.

For simplicity, let’s focus on swaptrans. This option swaps the editors and translators of works other than an issuetitle, maintitle, or series. Compare:


If a work has no author, but has editors, the style prints their names in the author’s position. The same happens if a work has no author or editor but has translators. The following are examples from *CMOS 14.103*:


What if a work has no author but has editors and translators? Since Windy City gives priority to editors, it defaults to listing editors in the author’s position:


Use swaptrans to reverse them:
3.2 Switching Places and Roles


Similarly, if a work’s editors and translators are the same, the style prints the editors’ role first, as in *edited and translated by*. Reverse them with `swaptrans`. From *CMOS* 14.104:


You may also swap roles by changing the value in the relevant `editor` type field (see Table 1 in section 1.1). For compilers, expanders, revisers, and updaters, you need to put a value in `editor` type anyway. You may as well pick a value that has the roles in the correct order. Either way, if you pick one that begins with *trans* (`transcomp`, `transed`, `transex`, `transrev`, or `transup`), Windy City assumes that the translator’s role goes first. Using `swaptrans` would then put the editor’s role first.

As often happens, cross-referencing raises some complications. The problem is that `swaptrans` applies to the editors and translators of a *title*, but cross-referenced works have more than one (*a title*, a cross-referenced *title*, and maybe even a double cross-referenced *title*). Three more entry options allow you to pick among them so as to swap whichever set of editors and translators you want. Here’s a silly example to showcase all three options:

```
@InCollection{doe2017,
    author = {Doe, Jane},
    title = {An Essay},
    editor = {Smith, John},
    translator = {Smith, John},
    pages = {18–35},
    crossref = {jones2017}
}
@InBook{jones2017,
    title = {A Volume of Essays},
    editor = {Smith, John},
    translator = {Smith, John},
    volume = {1},
    crossref = {white2017}
```
3.2 Switching Places and Roles

To swap the first set of editors and translators, use `swaptrans:title`:


To swap the second set of editors and translators, use `swaptrans:booktitle` (or `swaptrans:book`):


To swap the third set of editors and translators, use `swaptrans:bookbooktitle` (or `swaptrans:bookbook`):


4. Collections

To swap editors and translators of an `issuetitle`, `maintitle`, or `series`, use `swaptrans:issuetitle`, `swaptrans:maintitle`, or `swaptrans:series`, respectively. The first two also have short forms: `swaptrans:issue` and `swaptrans:main`.

On rare occasions, you may want to swap positions of an author and an editor or translator. From *CMOS* 14.104:


You can get this effect with the entry option `swapauth`, which works for `book`, `book-inbook`, `collection`, `inbook`, `incollection`, `mvbook`, and `mcollection` entry types. But beware: Windy City doesn’t look ahead to see if there’s really an editor or translator to take the author’s place. If it doesn’t find one, it still prints the author’s name after the title, leaving the author’s position empty. Also, if it finds both an editor and a translator, and they’re not the same person, it prints the editor’s name in the author’s position—again, giving priority to editors. If you want the translator’s name in the author’s position, use `swapauth` with the appropriate `swaptrans` option.

For correct sorting in a bibliography, a work that uses `swapauth` needs a field like `sortname` to sort it by the name of the editor or translator whose name will occupy the author’s position. It would be nice if Windy City could do this for you, but at present no feature of *biblatex* seems to allow the kind of on-the-fly changes to sorting that `swapauth` requires. Below is the entry for the previous example:

```latex
@Book{pound1953,
  options = {swapauth},
  author = {Pound, Ezra},
  title = {Literary Essays},
  editor = {Eliot, T. S.},
  sortname = {Eliot, T. S.},
  address = {New York},
  publisher = {New Directions},
  year = {1953}
}
```

4. Collections

Before you cite a collection or one of its volumes, you need to consider how you want the citation to look (*CMOS* gives you options) and whether the collection should count as a single work or as a composite. These issues have implications for how you structure entries in your bibliography database and how you use citation commands.
4.1 Structuring Citations

A work in a collection usually has a title and perhaps other publication information that differs from the collection’s. When preparing your bibliography database, the most basic choice to make about a work in a collection is which publication information has priority, the collection’s or the volume’s. Consider an example from CMOS 14.119:


The editor and title of the volume precede the editor and title of the collection. In standard notes and bibliographies, CMOS gives you the option of reversing this order. (See especially CMOS 14.119, 14.121, and 14.122, and compare 14.144 and 15.41.) Windy City does as well with the entry or preamble option swapvol.


In contexts where information for just one title appears (certain short citations), the one with priority determines which one identifies the work. By default, as you can see in the second note below, the volume has priority:


2. Armstrong, To Save the Soul of America, 45.

Whereas with swapvol:


2. Carson, The Papers of Martin Luther King, Jr., 7:45.
Notice the volume number in the second note above, separated from the page by a colon. When the collection has priority, the volume number should appear in the citation. There are enough examples in CMOS to make that clear. But when the volume has priority, the volume number is at best optional but probably incorrect. (It could cause confusion, since the collection is what comes in volumes, not the volumes themselves.) In any event, Windy City prints the volume number only when the collection has priority, that is, when \textit{swapvol} is \textit{true}.

If you want collections to have priority in every case, use the \textit{swapvol} preamble option, which acts globally. More likely, though, you’ll want to give priority to the collection when citing some works but not others. In those cases, use the \textit{swapvol} entry option. A good candidate for the latter is this example from CMOS 14.118:


The volume’s title (1883–1884) merely indicates a portion of the collection, somewhat like the volume of an encyclopedia with the title D–F. There’s nothing wrong with putting it first. But putting it second seems more intuitive.

For other works, \textit{swapvol} may seem like a poor choice, even if the output is formally correct:


Having the editor’s name first and the author’s name after the volume’s title looks odd. But it’s not wrong. The volume’s author didn’t write every volume of the collection. In giving priority to the collection, then, the first position, where an author’s name normally goes, should go to the collection’s editor, not to the volume’s author. By contrast, the default output looks more familiar:


One drawback of *swapvol* is that some works changed by it won’t sort correctly in a bibliography without help. The affected works include those without listed authors and those in which the volume has an author but the collection as a whole doesn’t—and possibly others. You can fix them by adding a *sortname* field to their bibliography database entries.

This drawback shouldn’t affect *bookinbook, inbook, incollection, or letter* entries when they’re cross-referenced to works that are changed by *swapvol*. They should have their own authors or titles that Windy City can use for proper sorting. It seems that *CMOS* gives exactly one such example in 14.120:


Here’s the output with the preamble or entry option *swapvol*:


In neither case does Windy City print the volume number before the page reference. That’s because, with or without *swapvol*, the citation is directly to the work’s title, not to the collection. The same goes for articles, chapters, books, and other works of this type. Further, consistent with *CMOS* 14.108 and 15.42, Windy City cross-references previously cited volumes.


Now with `swapvol`:


How does Windy City determine which entries in a bibliography database work with `swapvol`? To keep things simple, let’s focus on individual volumes of a collection, rather than works collected in them, like articles and chapters. Below are entries for an earlier example:

```latex
@InBook{armstrong2014,
  editor = {Armstrong, Tenisha},
  title = {To Save the Soul of America, January 1961–August 1962},
  shorttitle = {To Save the Soul of America},
  volume = {7},
  year = {2014},
  crossref = {carson1992}
}
@Collection{carson1992,
  editor = {Carson, Clayborne},
  title = {The Papers of Martin Luther King, Jr.},
  volumes = {14},
  address = {Berkeley},
  publisher = {University of California Press},
  year = {1992–}
}
```

A `bookinbook` or `inbook` entry for a volume works with `swapvol` if it has a `title`, a `volume`, and another `title` inherited from a cross-referenced entry, and if it lacks
certain fields that it shouldn’t have, such as a *maintitle* field or a *volume* field inherited from the cross-referenced entry. You can find the exact details in *windycity.bbx*. Just remember that entries like these should always be cross-referenced to a *collection* or to one of its aliases. Since Windy City treats them the same, it makes no difference whether you designate entries for volumes as *bookinbook* or *inbook*.

With one exception, you can get the same output with a *book*, *collection*, *mvbook*, or *mvcollection* entry. Here’s a counterpart to the previous example using *collection*:

```latex
@Collection{carson2014,
  editor = {Armstrong, Tenisha},
  title = {To Save the Soul of America, January 1961–August 1962},
  volume = {7},
  maintitle = {The Papers of Martin Luther King, Jr.},
  editora = {Carson, Clayborne},
  editoratype = {maintitle},
  volumes = {14},
  address = {Berkeley},
  publisher = {University of California Press},
  year = {2014}
}
```

These entry types work with *swapvol* if they have *volume* and *maintitle* fields, among other conditions. You may prefer them over *bookinbook* or *inbook* entries if you only intend to cite one volume of the collection and have no need to cite the collection as a whole. You risk trouble, though, if the volumes of the collection have different publication dates, as they do for *The Papers of Martin Luther King, Jr.* If the publication information for this volume goes last, the bibliography and long citation should list the publication date as 2014. If the publication information for the collection goes last, that date is 1992–. A *book* or *collection* entry, however, has just one field for a publication date, so using *swapvol* on *carson2014* would print 2014, not 1992–. Otherwise, the entry types are interchangeable. You can find examples of both approaches in *windycity.bib*.

Certain entries cross-referenced to entries that work with *swapvol* also work with it. Those entry types are limited to *bookinbook*, *inbook*, *incollection*, or *letter*. For the letter cited above:

```latex
@Letter{king2014,
  author = {King, Jr., Martin Luther},
  title = {Unpublished letter to the editor of the
    \textit{Afro-American} (Washington, DC)},
  crossref = {armstrong2014}
}
```
You may cross-reference this entry to \textit{armstrong2014} or \textit{carson2014}. The only difference is that, with \textit{swapvol}, cross-referencing to \textit{carson2014} once more gives the wrong publication date for the collection. With many collections, this wouldn't be an issue. Convenience, then, is perhaps the only consideration in choosing how you do it. If you plan to cite more than one volume of a collection, and different works in those volumes or the collection as a whole, cross-referencing to \textit{bookinbook} or \textit{inbook} entries is probably simpler. The other way is simpler if you plan to cite just one work in one volume.

As mentioned in \textit{CMOS 15.41}, reference lists should give priority to the volume, not to the collection. Nevertheless, Windy City doesn’t prevent you from using \textit{swapvol} with \textit{reflist}. Either way, remember that when a volume and a collection have different publication dates, a reference list entry prints both dates, which in turn requires you to use the \textit{bookinbook} or \textit{inbook} approach.


A final issue concerns whether you want long citations to give a work’s total number of volumes. Whereas entries in a bibliography almost always give that number (the exceptions are those that work with \textit{swapvol}), doing so in notes is optional (per \textit{CMOS 14.118}).

Here’s what Windy City does: Apart from entries that work with \textit{swapvol}, it prints the \textit{volumes} field in long citations only if the \textit{postnote} field is empty. That’s not a requirement of \textit{CMOS}. But there are several reasons for preferring this approach. If the \textit{postnote} is empty, printing the total preserves the correspondence between the long citation and its entry in the bibliography. This prevents the appearance that something has gone wrong when an element in one is missing from the other. If the \textit{postnote} isn’t empty, it likely contains information that, as with page references, should also include a volume number (see section 4.2). Including a volume number makes it less important, arguably, to include the total number of volumes. The main benefit, anyway, is that Windy City’s approach is consistent with citations of \textit{The Lisle Letters} in \textit{CMOS 14.117} and \textit{14.118}. No simpler rule would be.

Confused? All you need to know is that, barring exceptions for \textit{swapvol}, if you want to print a work’s total number of volumes without regard to the \textit{postnote}, use the entry option \textit{listvols}. Windy City uses it to match some examples in \textit{CMOS}, such as in 14.59:

4.2 Collections as Single Works

Although its discussion is a bit obscure, *CMOS* treats some multivolume collections as single works—but only, it seems, if every volume of the collection has the same title and publication date. To illustrate the distinction between a collection that counts as a single work and one that doesn’t, *CMOS* gives the following examples in 14.118:


In citations of *The Lisle Letters*, volume numbers and pages are separated by a colon. With *The Complete Tales of Henry James*, only the second citation follows this pattern. In the first, the volume number appears earlier, after the editor’s name. Why? Apparently, *The Lisle Letters* is a single, multivolume work because every volume has the same title and publication date. Not so *The Complete Tales of Henry James*. Its volumes have different titles and publication dates.

To get the right output, your bibliography database and citations need to reflect this distinction. Think of it this way: If a multivolume collection meets the criteria of a single work (all volumes have the same title and publication date), your bibliography database should have just one entry to which all citations of the collection refer, regardless of whether they cite particular volumes or the collection as a whole. Here’s the entry for *The Lisle Letters*:

```
@Collection{byrne1981,
  editor = {Byrne, Muriel St. Clare},
  title = {The Lisle Letters},
  volumes = {6},
  address = {Chicago},
  publisher = {University of Chicago Press},
  year = {1981}
}
```

To cite a particular volume of the collection, include the volume number in the citation’s postnote. For citations of pages, remember the format from *CMOS* 14.118: Volume numbers and pages are separated with a colon. Here’s the source for the first citation of *The Lisle Letters*:

```
\cite[4:243]{byrne1981}
```
4.2 Collections as Single Works

To cite a volume by itself, without a page reference, or to cite chapters, sections, and other parts of the work, remember to use the appropriate abbreviations (for some examples, see CMOS 14.120, 15.23, and 15.41):

\cite[vol. 3, chap. 9]{byrne1981}

What if the postnote is empty? Windy City assumes that you mean to cite the collection as a whole. As such, the first, long citation of the work prints the collection’s total number of volumes. Subsequent entries indicate the collection in whatever short form corresponds to the preamble options. The following shows the default output for two such citations of the collection:


For collections like *The Complete Tales of Henry James*, which don’t count as single works, every volume needs to have its own entry in the bibliography database. Here’s the entry for the volume cited in CMOS 14.118:

@Collection{James1963.5,
    options = {swapvol},
    author = {James, Henry},
    title = {1883–1884},
    volume = {5},
    maintitle = {The Complete Tales of Henry James},
    shortmaintitle = {Complete Tales of Henry James},
    editor = {Edel, Leon},
    editortype = {maintitle},
    volumes = {12},
    address = {London},
    publisher = {Rupert Hart-Davis},
    year = {1963}
}

Since the volume number is part of the entry and needs to print in different places depending on the context, don’t include it in the postnote. Let Windy City handle it. Below is the source for the first and second citations of *The Complete Tales of Henry James*:

\item \cite*[32--33]{james1963.5}
\item \cite*[34]{james1963.5}
The first citation prints the volume number after the editor’s name, long before the postnote. The second prints it just before the postnote, separated from the page by a colon:


…


Neither type of collection uses cross-referencing in the bibliography database. For *The Lisle Letters*, cross-referencing would introduce needless complexity. A single work should have a single entry, not multiple, cross-referenced entries. For *The Complete Tales of Henry James*, cross-referencing would result in errors because, with different titles and publication dates, not all publication data for the collection is true of each volume. To cite the collection as a whole, as in CMOS 14.117, add a separate entry:

```json
@Collection{james1962,
  author = {James, Henry},
  title = {The Complete Tales of Henry James},
  shorttitle = {Complete Tales of Henry James},
  editor = {Edel, Leon},
  volumes = {12},
  address = {London},
  publisher = {Rupert Hart-Davis},
  year = {1962–64}
}
```

### 4.3 Works in Volumes or As Volumes

Many examples so far show the use of the *volume* field. What they don’t quite show is that, as with editors and translators, Windy City associates *volume* with an entry’s lowest level title. Usually, this doesn’t require any thought when preparing a bibliography database. The *volume* field goes where you’d expect it to. But if you’re not careful, you could end up with errors, especially when citing books in collections.

```json
@InBook{spinoza1900.1.1,
  title = {A Theological-Political Treatise},
  crossref = {spinoza1900.1}
}
@Collection{spinoza1900.1,
  author = {Spinoza, Benedict de},
  title = {The Chief Works of Benedict de Spinoza},
```
5. Examples from *CMOS* Chap. 14, “Notes and Bibliography”

Examples in this section reproduce those in *CMOS* chapter 14. To help with cross-checking, subsection numbers and headings are from *CMOS*.

5.1 Basic Format, with Examples and Variations

14.23 Notes and bibliography—examples and variations


### 5.2 Notes

14.30 *Basic structure of the short form*

5.2 Notes


14.34 Shortened citations versus “ibid”

On short citations and the short and *ibid* preamble options, see sections 2.3 and 2.4.


With options short and *ibid*:

2. Ibid., 18.
3. Ibid.
6. Ibid., 433.
10. Ibid., 201–2.

14.54 Source notes for previously published material


### 14.57 Several citations in one note

See section 6.2 for information on how to reproduce this example.

Only when we gather the work of several scholars—Walter Sutton’s explanations of some of Whitman’s shorter poems; Paul Fussell’s careful study of structure in “Cradle”; S. K. Coffman’s close readings of “Crossing Brooklyn Ferry” and “Passage to India”; and the attempts of Thomas I. Rountree and John Lovell, dealing with “Song of Myself” and “Passage to India,” respectively, to elucidate the strategy in “indirection”—do we begin to get a sense of both the extent and the specificity of Whitman’s forms.¹


### 14.59 Abbreviations for frequently cited works

For information on shorthands, see section 8.2.


The 3-em dash for one repeated name

A 3-em dash replaces names in the author’s position of a citation in consecutive citations on the same page. Thus, whether the example below exactly reproduces that in CMOS 14.68 depends in part on whether a page break falls somewhere within the list.


Author’s Name

One author


Two or more authors (or editors)


14.77 Two or more authors (or editors) with same family name


14.78 Author’s name in title

On the use of starred citation commands, see section 6.1.


14.79 No listed author (anonymous works)

See section 8.1 on the use of the *authortype* field for anonymous works.
1. *A True and Sincere Declaration of the Purpose and Ends of the Plantation Begun in Virginia, of the Degrees Which It Hath Received, and Means by Which It Hath Been Advanced* (London, 1610).

2. *Stanze in lode della donna brutta* (Florence, 1547).


*Stanze in lode della donna brutta*. Florence, 1547.

*A True and Sincere Declaration of the Purpose and Ends of the Plantation Begun in Virginia, of the Degrees Which It Hath Received, and Means by Which It Hath Been Advanced*. London, 1610.

### 14.80 Pseudonyms


### 14.81 Cross-references for pseudonyms

For information on how to add entries that cross-reference others, see section 2.7. For examples of automatic cross-referencing in a bibliography, see 14.108 and 15.42.

Ashe, Gordon. *See* Creasey, John.


14.82 *Alternative real names*

For information on how to get the last entry below, see section 2.7.


———. *See also* O’Flaherty, Wendy Doniger.

14.83 *Authors known by a given name*


14.84 *Organization as author*

If an organization is the work’s author, remember to add an extra pair of brackets around the name of the organization in your bibliography database.


5.4 *Title of Work*

14.89 *Subtitles in cited works and the use of the colon*


14.90  Two subtitles in a cited work


14.92  “And other stories” and such


14.93  Dates in titles of cited works


14.94  Quoted titles and other terms within cited titles of works


14.95  Italicized titles and other terms within cited titles of works


14.96 Question marks or exclamation points in titles of cited works

6. Oram, Her Husband Was a Woman!, 184.


14.99 Translated titles of cited works

1. Henryk Wereszycki, Koniec sojuszu trzech cesarzy [The end of the Three Emperors’ League] (Warsaw: PWN, 1977); includes a summary in German.


### 5.5 Books

14.101 *Form of author’s name and title of book in source citations*


14.103 *Editor in place of author*


14.104 *Editor or translator in addition to author*

On how to make an author and editor swap places, see section 3.2.


### 14.105 Other contributors listed on the title page


### 14.106 Chapter in a single-author book


### 14.107 Contribution to a multiauthor book


### 14.108 Several contributions to the same multiauthor book


14.109 Book-length work within a book


14.110 Introductions, prefaces, afterwords, and the like


14.111 Letters in published collections


14.113 Editions other than the first


14.114 Reprint editions and modern editions


14.115 Microform editions

Farwell’s citation fails to match CMOS because the *howpublished* field, which seems like the best choice to contain microfiche, follows the *postnote* field, which contains p. 67, 3C12. This order is necessary elsewhere, such as in CMOS 14.163.


Citing Farwell with the preamble or entry option swapvol:


14.117 Citing a multivolume work as a whole


14.118 Citing a particular volume in a note

For a discussion of how to handle these types of works, see section 4.2.


14.119  Citing a particular volume in a bibliography


With preamble or entry option swapvol:


14.120  Chapters and other parts of individual volumes

There are some peculiarities with the first example. In the printed edition, but not online, *CMOS* errs in having .ed rather than edited by in the bibliography and neglects to invert the author’s name. More worrisome are the striking differences between the note and bibliography. They may represent alternative ways of formatting the data, as other examples do. But the note seems inconsistent with *CMOS* 14.118, and so doesn’t make much sense as an alternative. Windy City ignores it and in both cases follows the example of the bibliography.


Citing King with the preamble or entry option *swapvol*:


14.121 *One volume in two or more books*


With preamble or entry option *swapvol*:


14.122 *Authors and editors of multivolume works*

For issues surrounding the first example below, see section 4.1.

5.5 Books


With preamble or entry option *swapvol*:


14.123 Series titles, numbers, and editors


14.124 Series or multivolume work?

In the second example, *vol. 6* refers to the book’s series, Readings in Western Civilization. Usually, the number of a series isn’t recorded as a volume, so Windy City doesn’t use the *volume* field for them. Instead, it uses the *number* field, which it prints with no preceding abbreviation. Add one to the field as necessary. The *number* field for the second example below contains *vol. 6*.


14.126 “Old series” and “new series”


14.127 Place, publisher, and date


14.128 Place and date only, for books published before 1900
1. Oliver Goldsmith, The Vicar of Wakefield (Salisbury, 1766).

Goldsmith, Oliver. The Vicar of Wakefield. Salisbury, 1766.

14.132 No place of publication
   (n.p.: Windsor, 1910).
   ([Lake Bluff, IL?]: Vliet & Edwards, 1890).

14.137 Self-published or privately published books


14.140 Copublication

14.141 Distributed books


14.142 Publication Date—General


14.144 Multivolume works published over more than one year


Citing Hayek with the preamble or entry option *swapvol*:


5.5 Books

14.145 No date of publication

Boston, n.d.
Edinburgh, [1750?]

14.146 Forthcoming publications


Author, Jane Q. *Book Title*. Place: Publisher, forthcoming.
Writer, John J. *Another Book Title*. Place: Publisher, forthcoming.

14.159 Books requiring a specific application or device (e-books)


14.161 Books consulted online

The first and third notes below present a challenge: If a bibliography database entry contains an address for a work, such as a DOI, Windy City prints it in the work’s first, long citation. Such is the case with the second note below. To cite an address for just part of a work, but print one for the whole work in the bibliography, you need to override the style’s default behavior. The first and third notes do this with a command that temporarily clears the work’s DOI from its bibliography database entry. Here’s an example from the source:

\AtNextCitekey{\clearfield{doi}}
\item \cite[chap. 3, \url{https://doi.org/10.1093/acprof:oso/9780199343638.003.0004}]{bonds2014}


### 14.162 Freely available electronic editions of older works

The first example comes close to *CMOS*, except that, consistent with 14.114 and 15.40, it lists the edition by Project Gutenberg as a reprint.


### 14.163 Books on CD-ROM and other fixed media


### 5.6 Periodicals

#### 14.171 Journal volume, issue, and date

The note for Harper includes the month of publication. Windy City includes it in the bibliography as well, even though *CMOS* omits it. As for Lock’s entry, *CMOS* clearly errs in printing the surname twice. Also, for Wilder’s article, Windy City prints *nos.* before 1/2, not no., as *CMOS* has it. To print the correct season, Wilder’s
entry in the bibliography database includes *Fall* in the *issue* field. Using the *date* field with 2013-23 would print *Autumn 2013*.


**14.172 Forthcoming journal articles**

1. Margaret M. Author, “Article Title,” *Journal Name* 98 (forthcoming).


Author, Margaret M. “Article Title.” *Journal Name* 98 (forthcoming).


**14.173 Journal article preprints**

5.6 Periodicals


14.174 Journal page references


14.175 Journal articles consulted online


14.176 Access dates for journal articles


14.178 Journal special issues


**14.180 Articles published in installments**

By default, Windy City prints each installment as a separate entry. To get the format for the series, you’d need to use the *misc* entry type.


**14.182 Place where journal is published**


**14.183 Translated or edited article**


Author, Arthur Q. “Article Title.” Translated by Tim Z. Translator. *Journal Title*...

———. “Article Title.” Edited by Edward A. Editor. *Journal Title*...
5.6 Periodicals

14.184 New series for journal volumes


14.185 Short titles for articles


14.186 Abstracts


14.188 Basic citation format for magazine articles


14.189 Magazine articles consulted online


14.190 Magazine departments


14.191 Basic citation format for newspaper articles


14.195 Regular columns or features


14.197 Weekend supplements, magazines, and the like


14.199 Unsigned newspaper articles


14.200 News services and news releases


14.202 Book reviews


14.204 Unsigned reviews

On the use of the *type* field to format this example correctly, see section 8.1.


5.7 Websites, Blogs, and Social Media

14.208 Citing blog posts and blogs

In CMOS, one citation refers to *The Chronicle of Higher Education* and another to *Chronicle of Higher Education*. The latter also appears in 15.51, so it’s probably correct.


5.7 Websites, Blogs, and Social Media


14.209 Citing social media content

1. Junot Díaz, “Always surprises my students when I tell them that the ‘real’ medieval was more diverse than the fake ones most of us consume,” Facebook, February 24, 2016. https://www.facebook.com/junotdiaz.writer/posts/972495572815454.


Díaz, Junot. “Always surprises my students when I tell them that the ‘real’ medieval was more diverse than the fake ones most of us consume.” Facebook, February 24, 2016. https://www.facebook.com/junotdiaz.writer/posts/972495572815454.


5.8 Papers, Contracts, and Reports

14.215 Theses and dissertations


14.216 Unpublished manuscripts


14.217 Lectures and papers or posters presented at meetings


14.218 Working papers and the like


3. Salvador Florencio de Alarcón, “Compendio de las noticias correspondientes a el real y minas San Francisco de Aziz de Río Chico…de 20 de octobre [1771]” (photocopy, Department of Geography, University of California, Berkeley).

Alarcón, Salvador Florencio de. “Compendio de las noticias correspondientes a el real y minas San Francisco de Aziz de Río Chico…de 20 de octubre [1771].” Photocopy, Department of Geography, University of California, Berkeley.


14.220 Pamphlets, reports, and the like


5.9 Manuscript Collections

14.222 Note forms versus bibliography entries


Revere Family Papers. Massachusetts Historical Society, Boston.
5.9 Manuscript Collections

14.229 Examples of note forms for manuscript collections

1. Burton to Merriam, telegram, 26 January 1923, box 26, folder 17, Charles E. Merriam Papers, Special Collections Research Center, University of Chicago Library.


4. Gilbert McMicken to Alexander Morris, 29 November 1881, Glasgow (Scotland), Document 1359, fol. 1r, Alexander Morris Papers, MS-12-84, Provincial Archives of Manitoba, Winnipeg.


14.230 Examples of bibliography entries for manuscript collections

Examples with note forms in section 14.229:

Merriam, Charles E. Papers. Special Collections Research Center, University of Chicago Library.


Examples unique to this section:

1. Papers of the Women’s Organization for National Prohibition Reform, Alice Belin du Pont files, Pierre S. du Pont Papers, Eleutherian Mills Historical Library, Wilmington, DE.


5.10 Special Types of References

14.232 Reference works consulted in physical formats

Some reference works show full publication information in the same way as books. Use the book entry type for them. The first three citations below are different. They need the reference or inreference entry type. See section 2.7 for more information. Following the suggestion in CMOS 14.232, reference and inreference works don’t appear in bibliographies.


14.233 Reference works consulted online

Like some of the reference works in the previous section, the ones below need the reference or inreference entry type. As odd as it may seem, but consistent with CMOS, they, too, aren’t included in bibliographies. See section 2.7 for more information.

5.10 Special Types of References

14.234 Citing individual reference entries by author


14.246 Citing specific editions of classical references


14.251 Modern editions of the classics


14.258 Patents


14.260 Citations taken from secondary sources


6. Examples from *CMOS* Chap. 15, “Author-Date References”

Examples in this section reproduce those in *CMOS* chapter 15. To help with cross-checking, subsection numbers and headings are from *CMOS*. Since parenthetical citations are relatively simple, and since the format of references lists is derivative of the default, the examples below are more selective than those in the previous section.

6.1 Basic Format, with Examples and Variations

15.9 *Author-date references—examples and variations*

(Strayed 2012, 87–88), (Daum 2015, 32), (Grazer and Fishman 2015, 188), (García Márquez 1988, 242–55), (Gould 1984, 310), (Bagley 2015, 484–85), (Liu 2015, 312)


6.2 Reference Lists and Text Citations

15.14 *Placement of dates in reference list entries*

(Pager and Pedulla 2015), (Unger and Smolin 2014)


15.20 Reference list entries with same author(s), same year

(Fogel 2004b, 218), (Fogel 2004a, 45–46)


15.22 Text citations—basic form

Ignore the error in CMOS: In reference lists, a title goes after the year, not before.

(Hetherington and Rudolph 2015), (Grove 2015), (Hetherington and Rudolph 2015; Grove 2015)


(C. Doershuk 2017), (J. Doershuk 2016)

Doershuk, Carl. 2017. . . .
Doershuk, John. 2016. . . .

15.24 Additional material in text citations

(Mandolan 2017; t-tests are used here)

15.25 Text citations in relation to surrounding text and punctuation

Fiorina et al. (2005) and Fischer and Hout (2006) reach more or less the same conclusions. In contrast, Abramowitz and Saunders (2005) suggest that the mass public is deeply divided between red states and blue states and between churchgoers and secular voters.

15.27 Several references to the same source

Complexion figures prominently in Morgan’s descriptions. When Jasper compliments his mother’s choice of car (a twelve-cylinder Mediterranean roadster with leather and wood-grained interior), “his cheeks blotch indignantly, painted by jealousy and rage.”
6.3 Author-Date References: Special Cases

(Chaston 2000, 47). On the other hand, his mother’s mask never changes, her “even-tanned good looks” (56), “burnished visage” (101), and “air-brushed confidence” (211) providing the foil to the drama in her midst.

15.29 Text citations of works with more than three authors


15.30 Multiple text references


6.3 Author-Date References: Special Cases

15.34 Author-date format for anonymous works (no listed author)

See section 8.1 on the use of the authortype field for anonymous works.

(True and Sincere Declaration 1610), (Stanze 1547), ([Horsley] 1796), ([Hawkes?] 1834)


Stanze in lode della donna brutta. 1547. Florence.

A True and Sincere Declaration of the Purpose and Ends of the Plantation Begun in Virginia, of the Degrees Which It Hath Received, and Means by Which It Hath Been Advanced. 1610. London.

15.35 Pseudonyms in author-date references

(Stendhal 1925)


15.36 Editor in place of author in text citations

(Silverstein 1974), (Soltes 1999)


15.37 Organization as author in author-date references

In the reference list, CMOS errs in printing :1997 after ISO 4. Compare it with the nearly identical example in 14.84.

(ISO 1997)


15.40 Reprint editions and modern editions—more than one date


15.41 Multivolume works published over more than one year

(Tillich 1951–63, 1:133), (Hayek 2011, 329)


15.42 Cross-references to multiauthor books in reference lists

(Draper 1987), (Harrington 1987), (Zukowsky 1987)


15.44 No date of publication in author-date references

(Nano [1750?]), (Nano, n.d.)

Nano, Jasmine L. [1750?]. Title of Work...
——. n.d. Title of Another Work...

15.45 “Forthcoming” in author-date references

(Faraday, forthcoming)


15.47 Parentheses or comma with issue number

In the second reference list entry below, Windy City prints a colon after the journal number. CMOS prints a comma there—likely an error.

(Glass and Levchak 2014), (Meyerovitch 1959)


15.48 Colon with volume number

The example below shows the output when an article’s publication month isn’t included in the bibliography database and so doesn’t come between a volume number and a page reference.

(Gunderson and Leal 2015)


15.49 Newspapers and magazines in reference lists

(New York Times 2002)

15.51 Citing blogs in author-date format

*CMOS* seems mistaken in printing a period after *Chronicle of Higher Education* instead of a comma. Compare with 14.208 and 15.42.

(Germano 2017)


15.52 Citing social media content in author-date format

(Díaz 2016), (O’Brien 2015), (Chicago Manual of Style 2015)


Díaz, Junot. 2016. “Always surprises my students when I tell them that the ‘real’ medieval was more diverse than the fake ones most of us consume.” Facebook, February 24, 2016. https://www.facebook.com/junotdiaz.writer/posts/972495572815454.


15.54 Manuscript collections in author-date format

An example using *parenauth* (see section 6.3):

Alvin Johnson, in a memorandum prepared sometime in 1937 (Kallen Papers, file 36), observed that…


An example using *parencite*:

(Dinkel, n.d.)


15.55 Patents or other documents cited by more than one date

(Iizuka and Tanaka 1986)

15.56 “Quoted in” in author-date references

In Louis Zukofsky’s “Sincerity and Objectification,” from the February 1931 issue of *Poetry* magazine (quoted in Costello 1981)…

Abbreviations

This section shows the output of `printbiblist` with the argument `shorthand`. Running `printshorthands` produces the same output. By default, works in this list also appear in bibliographies. To exclude them, use the preamble option `nolos`. See section 2.4 for more information.


Bibliography

Bibliography (Standard Format)

This section shows the default output of `\printbibliography`. The next section shows the author-date format.


Alarcón, Salvador Florencio de. “Compendio de las noticias correspondientes a el real y minas San Francisco de Aziz de Río Chico…de 20 de octubre [1771].” Photocopy, Department of Geography, University of California, Berkeley.


Ashe, Gordon. *See* Creasey, John.


Author, Margaret M. “Article Title.” *Journal Name* 98 (forthcoming).


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———. “Form and Meaning in Whitman’s ‘Passage to India’.” *PMLA* 70, no. 3 (June 1955): 337–49.


Díaz, Junot. “Always surprises my students when I tell them that the ‘real’ medieval was more diverse than the fake ones most of us consume.” Facebook, February 24, 2016. https://www.facebook.com/junotdiaz.writer/posts/972495572815445.


Goldsmith, Oliver. The Vicar of Wakefield. Salisbury, 1766.


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Merriam, Charles E. Papers. Special Collections Research Center, University of Chicago Library.


Morton, Anthony. *See Creasey, John.*


Revere Family Papers. Massachusetts Historical Society, Boston.


Stanze in lode della donna brutta. Florence, 1547.


*A True and Sincere Declaration of the Purpose and Ends of the Plantation Begun in Virginia, of the Degrees Which It Hath Received, and Means by Which It Hath Been Advanced*. London, 1610.


York, Jeremy. See Creasey, John.


References (Author-Date Format)

This section shows the output of `printbibliography` in the author-date format. For information on how to produce this output, see section 2.4. Issues with sorting in this section are mentioned there. Creating a reference list in the preferred way, with the `reftlist` preamble option, should prevent those issues.


Alarcón, Salvador Florencio de. n.d. “Compendio de las noticias correspondientes a el real y minas San Francisco de Aziz de Río Chico…de 20 de octubre [1771].” Photocopy, Department of Geography, University of California, Berkeley.


Ashe, Gordon. See Creasey, John.


Author, Margaret M. Forthcoming. “Article Title.” *Journal Name* 98.


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———. 1955. “Form and Meaning in Whitman’s ‘Passage to India’.” PMLA 70, no. 3 (June): 337–49.


Diaz, Junot. 2016. “Always surprises my students when I tell them that the ‘real’ medieval was more diverse than the fake ones most of us consume.” Facebook, February 24, 2016. https://www.facebook.com/junotdiaz.writer/posts/972495572815454.


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*Stanze in lode della donna brutta*. 1547. Florence.


A *True and Sincere Declaration of the Purpose and Ends of the Plantation Begun in Virginia, of the Degrees Which It Hath Received, and Means by Which It Hath Been Advanced*. 1610. London.


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York, Jeremy. See Creasey, John.
