

Turabian Formatting for L^AT_EX

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This package provides Chicago-style formatting based on Kate L. Turabian's *A Manual for Writers of Research Papers, Theses, and Dissertations: Chicago Style for Students and Researchers* (8th edition).

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Introduction

This package provides Chicago-style formatting based on Kate L. Turabian's *A Manual for Writers of Research Papers, Theses, and Dissertations: Chicago Style for Students and Researchers*, 8th edition. In doing so, this package adheres closely to the formatting guidelines described in Turabian's work while, also, being readily adaptable to additional formatting requirements (e.g. formatting requirements specific to an institution and/or department).

It is hoped that authors will find this package relatively easy to implement. There are few (if any) new commands to learn, as the package builds upon (and makes adjustments to) already-existing \LaTeX commands. As such, formatting research papers, theses, and dissertations should require a minimum amount of changes to a standard \LaTeX source file (your `.tex` file).

For citations, this package is designed to work well with David Fussner's outstanding (and highly-recommended) `biblatex-chicago`.

1 Using the Document Classes and Package

A document may be formatted using `turabian-formatting` in one of three ways: either (1) specifying the document class as a turabian-formatted research paper (`turabian-researchpaper`), (2) specifying the document class as a thesis/dissertation with turabian-style formatting (`turabian-thesis`), or (3) loading the package in the \LaTeX source-file preamble.

1.1 Document Class for Research Papers

`turabian-
researchpaper`

The `turabian-researchpaper` document class provides formatting specific to research papers. The requisite code:

```
\documentclass{turabian-researchpaper}
```

This document class builds on the `turabian-formatting` package and is based on the `article` document class.

1.2 Document Class for Theses and Dissertations

`turabian-thesis`

The `turabian-thesis` document class offers formatting specific to theses and dissertations. The requisite code:

```
\documentclass{turabian-thesis}
```

This document class builds on the `turabian-formatting` package and is based on the `book` document class. As such, support for chapter headings (`\chapter` and `\chapter*`), title pages specific to theses/dissertations (refer to subsection 3.4), table of contents, and formatting commands to structure the document into front matter, main matter, and back matter (refer to subsection 3.3), are also included.

1.3 Package for Turabian-Style Formatting

`turabian-formatting`

The `turabian-formatting` package can be loaded in the preamble of the source file as follows:¹

```
\usepackage{turabian-formatting}
```

This package should always be loaded *before* using the `biblatex-chicago` package.

2 Formatting Options

The `turabian-formatting` package adheres to the manual's guidelines on the formatting of text. This includes double-spacing all text throughout the document except items that should have single-spacing (Turabian 2013, 373).² Paragraph indentation is set to 0.5 inches.

Page margins, by default, are 1 inch from the edges of the paper.

The `turabian-thesis` document class has an additional binding offset of 0.5 inches, effectively creating a left/inside margin of 1 1/2 inches.³

¹ The `turabian-formatting` package has been tested with the standard `article`, `report`, and `book` L^AT_EX document classes. If the document class is either `turabian-researchpaper` or `turabian-thesis`, however, do not load the `turabian-formatting` package again.

² Double-spaced text is typeset with a `\baselinestretch` of 2. This is different than the default values provided by the `setspace` package.

³ This is accomplished by `turabian-thesis` making changes to the following lengths: (1) setting `\oddsidemargin` to 0.5in; (2) setting `\evensidemargin` to 0; and (3) adding -0.5in to `\textwidth`.

2.1 Standard Options for Document Classes

Both `turabian-thesis` and `turabian-researchpaper` document classes support most of the standard document class options.

The default `normal` font size is twelve-point type (12pt)—the preferred font type size for the body of the text (Turabian 2013, 373). This package also supports `normal` font type sizes of 10pt and 11pt.

The default page size, for both document classes, is $8\frac{1}{2} \times 11$ inches (US Letter size). And as with other standard L^AT_EX document classes, different paper sizes and can be specified as class options, including `letterpaper` (the default), `a4paper`, and `legalpaper`.

The `twocolumn` option, however, is not supported. More so, the `turabian-thesis` document class does not support the `notitlepage` option either.

Both documents classes, by default, are set to `oneside`.

2.2 Ragged Right (Left Align) Text

`raggedright`

By default, text consisting of more than one line is justified on both sides of the document with the last line flush left. Turabian, however, recommends setting “your word processor to align text flush left with a ragged right margin” while also not using its “automated hyphenation feature” (404). For ragged right formatting without hyphenations throughout the work, use the `raggedright` formatting option.

2.3 Notes-Bibliography and Author-Date Styles

This package is designed to work well with the `biblatex-chicago` package. This includes support for both notes-bibliography and author-date citation styles (the former being the default style).

If the `biblatex-chicago` package is loaded by the user, the following options are passed to `biblatex-chicago`: `isbn=false`, `autolang=other`, `footmarkoff`, and `backend=biber`. The `\printbibliography` command will provide a bibliography with *Bibliography* as the default heading, irrespective of the document class.

`authordate`

Support for the author-date style is enabled by specifying the `authordate` formatting option. This option passes an `authordate` option to `biblatex-chicago` as

well as redefines the default heading for the references list (also typeset using the `\printbibliography` command) to that of *References*.

`noadjustbib`

Adjustments made to `\printbibliography` can be disabled using the `noadjustbib` formatting option. The following code, loaded at the end of the preamble, is affected by this option:

```
\if@authordateformat
  \DefineBibliographyStrings{english}{%
    bibliography = {References}}
\else
  \DefineBibliographyStrings{english}{%
    references = {Bibliography}}
\fi
\renewcommand{\bibsetup}{\singlespacing}
\renewcommand{\bibitemsep}{1\baselineskip}
\renewcommand{\bibhang}{0.5in}
```

2.4 Endnotes

Although footnotes are used by default, endnotes can also be enabled. This is accomplished through the use of the `endnotes` package.

`endnotes`

Endnotes can be used by specifying the `endnotes` formatting option. Through this option, the `endnotes` package is loaded. More so, the `endnotes` option causes footnotes to be restarted on each page and labelled using symbols in the sequence of: * † ‡ § (Turabian 2013, 156). The `notetype=endonly` option is also passed to the `biblatex-chicago` package.

To produce a list of endnotes, use the `\theendnotes` command provided by the `endnotes` package. Through the `endnotes` option, each endnote is single-spaced with a “blank line between notes.” The default heading for this list of endnotes is typeset as *Notes*.⁴ If the document class supports chapters, the numbering of endnotes is also restarted for each chapter. The endnotes list will then have subheadings that divide endnotes by each chapter (157).

⁴ The *Notes* heading is typeset using either `\section*` or, if `\chapter` has been defined by the document class, `\chapter*`. If there are no endnotes preceding `\theendnotes`, this command will generate a *Notes* heading with an empty endnotes list.

3 Formatting Commands

3.1 Headings: Chapters, Sections, and Subsections

The `turabian-formatting` package provides support for document classes that allow text to be divided into sections and subsections. This package also provides support for document classes that define `\chapter` and `\chapter*`, including the `report`, `book`, and `turabian-thesis` document classes.

Chapters

<code>\chapter</code>	The <code>\chapter</code> command starts a new page and creates a <i>Chapter</i> label “followed by the chapter number at the top of the page” in arabic numerals. The “descriptive title” of the chapter is placed “two lines down, following a blank line” and is separated from the first line of following text by “two blank lines” (Turabian 2013, 391).
<code>\chapter*</code>	<code>\chapter*</code> , unlike <code>\chapter</code> , does not provide a line with a <i>Chapter</i> label and numbering nor is it included in the Table of Contents. ⁵ This is useful for the titles/headings of specific elements, including <i>Introduction</i> (390), <i>Abstract</i> (389), <i>Conclusion</i> (398), <i>Appendixes</i> (398), <i>Notes</i> (399), and <i>Bibliography</i> (401).

Sections and Subsections

<code>\section</code> <code>\subsection</code> <code>\subsubsection</code>	This package provides support for three levels of sections and subsections: <code>\section</code> , <code>\subsection</code> , and <code>\subsubsection</code> (including their asterisked versions). These section and subsection commands do not provide any label or numbering. <code>\section</code> places “more space before a subhead than after (up to two blank lines before and one line, or double line spacing, after)” (393).
<code>\section*</code> <code>\noadjustssect</code>	If the document class does not define chapter headings, <code>\section*</code> will instead provide two blank lines between the title/subheading and the first line of text. This is particularly useful for the subheadings of specific elements, including <i>Intro-</i>

⁵ To add a numberless “chapter” to the Table of Contents, use the `\addcontentsline` command immediately following the `\chapter*` command. For the *Bibliography* or *References* heading from `\printbibliography` (from the `biblatex-chicago` package), place this command immediately *after* the use of the `\clearpage` and `\addcontentsline` commands. Using the `endnotes` option will place the *Notes* heading in the table of contents.

duction (Turabian 2013, 390), *Notes* (399), and *Bibliography* (401). Inserting the `\noadjustssect` command in the document preamble will disable this behaviour.

3.2 Page Styles: Headers and Footers

Headers and footers, by default, are placed within the margins. The top of the header is 0.5 inches from the top edge of the page. The baseline of the footer is 0.5 inches from the bottom edge of the page (372, 374).

`\pagestyle`
`\thispagestyle`

The layout of the headers and footers are determined by the specific page styles. They are used with the `\pagestyle` and `\thispagestyle` commands.⁶

empty: An empty page style with no header or footer.

plain: A “plain” page style that centres the page number in the footer. For a thesis or dissertation, it applies to pages with page numbers in the front matter as well as the first page of each chapter in the main matter and back matter (refer to subsection 3.3).

headings: The default page style places a page number in the right-hand corner of the header.

3.3 Document Structure for Thesis/Dissertation

A thesis/dissertation is divided into three, distinct components: (1) front matter, (2) main matter or text of the paper, and (3) back matter (375). As such, this package provides support for document classes that use the `\frontmatter`, `\mainmatter`, and `\backmatter` commands (such as the `book` and `turabian-thesis` document classes).

Front Matter

`\frontmatter`

The front matter is declared with the `\frontmatter` command. By default, the `\pagestyle` is set to `empty` (refer to section 3.2). The numbering of pages in the front matter begins with the title page, although page numbers are not placed on pages until the Table of Contents (373–374, 376, 380).

⁶ The `fancyhdr` package can be used to typeset (and adjust) these page styles. This includes placing optional text (such as a page identifier) in the header and/or footer (Turabian 2013, 374).

`\tableofcontents` Placing the `\tableofcontents` command in the front matter will cause page numbers to appear on pages with the Table of Contents and subsequent pages of the front matter. These page numbers use roman numerals and are placed in centre of the footer (Turabian 2013, 373–374) using the `plain` page style (refer to section 3.2).

Main Matter

`\mainmatter` The main matter (or text of the paper) begins with the `\mainmatter` command. Page numbering restarts with arabic numerals, starting with page 1. Page numbers are placed on the right-side of the header, using the `headings` page style (with the exception of the first page of each chapter, which instead use the `plain` page style) (373–374).

Back Matter

`\backmatter` The back matter is declared using the `\backmatter` command. Page numbering and page styles are continued from the main matter (373–374).

3.4 Title Page

The `turabian-researchpaper` document class provides a title page intended for research papers.⁷ Page numbering begins immediately following the title page. The `turabian-thesis` document class, however, provides a “model” title page intended for a thesis or dissertation. The title page of a thesis/dissertation is included in the page numbering of the front matter (376, 378).

`\maketitle` The `\maketitle` command will create a separate title page if the document class specifies (or has as default) the `titlepage` option—the default option for both `turabian-researchpaper` and `turabian-thesis`.

`\title`
`\subtitle`
`\author`
`\date` `\maketitle` uses information specified in the source document preamble, through the following commands (each of which is self-evident): `\title`, `\author`, `\date`, and `\subtitle`. For research paper title pages, footnotes (as well as `\thanks`) can also be used.

`\submissioninfo` For a research paper, `\submissioninfo` is used for typesetting “any information requested by your instructor,” between the name of the course and the date (376).

⁷ The `turabian-formatting` package provides a title page for research papers.

For a thesis or dissertation title page, however, this command is used to typeset requested information between the title/subtitle and the name of the department.

<code>\course</code>	<code>turabian-researchpaper</code> provides the optional <code>\course</code> command for typesetting course information (such as the name of the course).
<code>\institution</code> <code>\department</code> <code>\location</code>	<code>turabian-thesis</code> also provides: (1) <code>\institution</code> for typesetting the institution at the top of the page, (2) for typesetting the name of the department, and (3) <code>\location</code> for typesetting a location just above the date.

To create a custom title page, use the `titlepage` environment.

4 Required and Recommended Packages

This package requires L^AT_EX2e and makes use of the following packages installed as part of a standard L^AT_EX distribution: `etoolbox`, `setspace`, `nowidow`, `footmisc`, `endnotes`, `xparse`, and `geometry`.⁸

The following packages are highly recommended: `biblatex-chicago`, `csquotes`, `fancyhdr`, `ellipsis`, and `threeparttable`.

5 Updates

2016/03/15	An <code>authordate</code> option has been added, improving support for the author-date citation style.
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Adjustments to the formatting of both enumerated and itemized lists.

The `endnotes` option has (1) added support for endnotes that contain an underscore character (`_`), and (2) improved the implementation of the `\theendnotes` command.

2016/02/27	This update is a significant rewrite of <code>turabian-formatting</code> . It is designed to be faster and require fewer packages.
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Both `turabian-researchpaper` and `turabian-thesis` can use the `noadjustbib` option.

⁸ The `geometry` package is only required if using the deprecated `emptymargins` option.

Significant adjustments made to the `\maketitle` command, including support for footnotes.

Double-spaced text is typeset with a `\baselinestretch` of 2 using the `\setstretch` command provided by the `setspace` package (instead of `\doublespacing`). This is different than previous versions of `turabian-formatting` and should be more-consistent with expectations for “double spaced” work.

Packages no longer required: `xifthen`, `fancyhdr`, `titlesec`, `quoting`, `caption`, `flafter`, `url`, and `chngcntr`.

Deprecated options: `emptymargins`.

Deprecated commands: `\tablenote`, `\tablesource`, `\faculty`, and `\mydegree`.

Removed commands: `\setpageidentifier`, and `\setwordcount`.

2015/11/14

Added support for the `endnotes` package. An `endnotes` option has been added, removing the need for an `endnotesonly` option for `turabian-researchpaper`.

Improved support for the `biblatex-chicago` package, including added support for the author-date citation style.

Footnote lines are no longer forced together, allowing a footnote to run over to the next page.

Adjustments to the spacing that follow the `\chapter*` and `\section*` commands.

Updated use of page style options, removing the `fancy` page style.

`\frontmatter` and `\tableofcontents` no longer ignore the `bindingoffset` value and margin sizes specified in the source document preamble, through the `geometry` package.

Improved implementation of the `raggedright` formatting option with: (1) table and figure captions; and (2) the `\tablenote` command.

Adjustments to the behaviour of table and figure positioning.

Deprecated commands: `\setwordcount`, `\setpageidentifier`, and `\tablesource`.

Removed commands: `\mytitlepage` and `\setdraftindicator`.

2014/12/27

Formatting changes to both subsection titles and title page for both research papers and theses/dissertations.

2014/12/10

Adjustments to formatting that more-accurately reflect the 8th edition of Turabian's *A Manual for Writers of Research Papers, Theses, and Dissertations*.

References

Turabian, Kate L. 2013. *A Manual for Writers of Research Papers, Theses, and Dissertations: Chicago Style for Students and Researchers*. 8th edition. University of Chicago Press.

Appendix: Sample Code for a Research Paper

The following is for a research paper using the L^AT_EX markup language.

```
\documentclass{turabian-researchpaper}

\usepackage[english]{babel}
\usepackage[utf8]{inputenc}
\usepackage{csquotes, ellipsis}

\usepackage{biblatex-chicago}
\addbibresource{mybibfile.bib}

\title{An Interesting Work}
\author{Author's Name}
\date{\today}

\begin{document}

\maketitle

\section{Introduction}
Amazing, introductory ideas that provide unique insight into your
field of interest and ``wows" your professor.

\section{An Interesting Section}
Great thoughts that further your argument. This includes lots of
strong evidence presented throughout several paragraphs, each
accompanied by necessary citations.\autocite[8]{authortitle2013}

\section{Another Insightful Section}
More ideas that really make this a great paper. Maybe a footnote or
two.\footnote{Some peripheral thoughts.}

\section{Conclusions}
At this point, you've changed everything (including your marks!).
Time to wrap up!

\clearpage
\printbibliography

\end{document}
```