

Turabian Formatting for L^AT_EX

Omar Abdool

December 9, 2014

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* (7th edition).

Contents

1	Introduction	2
2	Using the Package and Document Classes	2
2.1	Package for Turabian-style formatting	2
2.2	Document class for Research Papers	3
2.3	Document class for Theses and Dissertations	3
3	Formatting Options	3
3.1	Standard Options for Document Classes	3
3.2	Page Layout and Empty Margins	4
3.3	Ragged Right (Left Align) Text	4
3.4	Adjustments to <code>biblatex-chicago</code> formatting	4
3.5	Using Endnotes with Research Papers	5
4	Formatting Commands	5
4.1	Page Identifier	5
4.2	Draft Indicator	5
4.3	Title Page	6
4.3.1	Thesis/dissertation title page	6
4.4	Captions and Table Footnotes	7
4.5	Document Structure for Thesis/Dissertation	7
5	Page Styles: Headers and Footers	8
6	Required Packages	9
7	Known Bugs	9
8	Sample Code	10

1 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*, 7th 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 (ie. formatting requirements specific to an institution and/or department).

More so, 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 provides optional support for David Fussner's outstanding (and highly-recommended) `biblatex-chicago`.

2 Using the Package and Document Classes

To format a document with this package, one can load the `turabian-formatting` package in the \LaTeX source file preamble. Alternatively, the document class can be specified as either a research paper (`turabian-researchpaper`) or a thesis/dissertation (`turabian-thesis`).

2.1 Package for Turabian-style formatting

`turabian-
formatting`

The `turabian-formatting` package is loaded in the preamble of the source file:¹

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

Important note: The `turabian-formatting` package should always be loaded *before* loading the `biblatex-chicago` package.

¹ The `turabian-formatting` package has been tested with the standard `article`, `report`, and `book` \LaTeX document classes.

2.2 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.

2.3 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.

3 Formatting Options

3.1 Standard Options for Document Classes

Both `turabian-thesis` and `turabian-researchpaper` document classes support many of the standard document class options.²

The default page size, for both document classes, is $8\frac{1}{2} \times 11$ inches (US Letter size). The normal font size is 12pt.

As with other standard L^AT_EX document classes, different paper sizes and font sizes can be specified as class options. For example:

```
\documentclass[11pt,a4paper]{turabian-researchpaper}
```

`draft`

The standard `draft` mode is also available as an option. As part of this mode, text indicating the work is draft is also placed in the header (refer to subsection 4.2).

² Neither the `notitlepage` nor the `twocolumn` options are available with either document class.

3.2 Page Layout and Empty Margins

Page margins, by default, are 1 inch from the edges of the paper.³ To make changes to the page layout, use of the `geometry` package is recommended.

Headers and footers, by default, are placed inside the margins. The top of the header is 0.5 inches from the top of the page. The baseline of the footer is 0.5 inches from the bottom edge of the page. Headers and footers are typeset with the `fancyhdr` package (refer to section 5).

`emptymargin`s

The `emptymargin`s option removes headers and footers from within the margin and, instead, places them within the space normally used for the body text. As such, the page margins are empty of all text.

Important Note: Using the `emptymargin`s option, however, reduces the height of the text (`textheight`) by 0.5 inches when a header or footer is placed on the page. Because some pages within a document will have headers, and others footers, the `emptymargin`s option allows for pages to have either a header or a footer on a page—not both on the same page. Empty pages have neither a header nor a footer (refer to section 5).

3.3 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 left justify (with a ‘ragged’ right margin).”⁴ To use ragged right formatting throughout the work, use the `raggedright` option.

3.4 Adjustments to `biblatex-chicago` formatting

`noadjustbib`

Reformatting support for `biblatex-chicago` can be disabled using the `noadjustbib` formatting option. This affects adjustments to the formatting of footnotes and endnotes, as well as changes to both the headings and spacing in the bibliography.

³ The `turabian-thesis` document class also has an additional binding offset of 0.5 inches on the left, effectively creating a left margin of 1½ inches.

⁴ Kate L. Turabian, *A Manual for Writers of Research Papers, Theses, and Dissertations: Chicago Style for Students and Researchers*, 7th ed. (University of Chicago Press, 2007), 292, 405.

3.5 Using Endnotes with Research Papers

`endnotesonly` For research papers, endnotes can be used instead of footnotes. The `endnotesonly` option is only available for the `turabian-researchpaper` document class.⁵

4 Formatting Commands

4.1 Page Identifier

`\setpageidentifier` Optional text (a page identifier) can be placed in the header.⁶ This text is specified using the `\setpageidentifier` command in the preamble of the \LaTeX source file.

`\setpageidentifier[<horizontal space length>]{<Text>}`

The default horizontal space, before the page number, is 3ex. This command applies to pages that use either the default `fancy` page style or the `headings` page style (refer to section 5).

4.2 Draft Indicator

`\setdraftindicator` When the `draft` option has been specified, text indicating the draft status is placed on pages throughout document. This text can be changed in the preamble of the \LaTeX source file when using the `\setdraftindicator` command:

`\setdraftindicator{<Text>}`

Default text example:

Draft (December 9, 2014)

Text indicating the draft status of the document is only found on pages that use either the default `fancy` page style or the `headings` page style (refer to section 5).

⁵ Cite keys must not contain an underscore character, “_”. Refer to section 7.

⁶ Turabian, 376.

4.3 Title Page

`\maketitle` To create a title page, you can use the standard `\maketitle` command along with `\title`, `\author`, and `\date`.⁷

Both `formatting-turabian` and `turabian-researchpaper`, by default, produce a title page intended for research papers. Page numbering begins immediately following the title page.

The following optional commands are also available for use with the title page (each of which are self-evident): `\subtitle`, `\course`, and `\institution`.

`\setwordcount` The optional `\setwordcount` command inserts text at the bottom right of the title page—text intended for an optional word count sometimes required in the submission of research papers. The inclusion of the word count does not affect the vertical positioning of text on the title page.

`\mytitlepage` To implement a custom title page, renew the optional `\mytitlepage` command with your text written with L^AT_EX. This can include reference to another `.tex` file. For example:

```
\renewcommand{\mytitlepage}{%
    Custom title page content
}
```

4.3.1 Thesis/dissertation title page

The `turabian-thesis` document class provides a title page intended for a thesis or dissertation. In addition to the commands noted above, this document class provides commands that can be placed in the header. This includes: `\faculty`, `\mydegree`, `\department`, and `\location`.

Unlike research papers, the title page of a thesis or dissertation is included in the front matter, as page i (although the page number is not placed on the page itself).⁸

⁷ By default, a separate title page is created with the `\maketitle` command. The `notitlepage` for standard document classes (and default for the `article` document class) is no longer available.

⁸ Turabian, 386.

4.4 Captions and Table Footnotes

Captions, for both figures and tables, are implemented using (and can be altered through) the `caption` package.

A table, Turabian describes, can also have four kinds of footnotes: “(1) source lines ..., (2) general footnotes that apply to the whole table, (3) footnotes that apply to specific parts of the table, and (4) notes on levels of statistical significance.”⁹

`\tablesource` The optional `\tablesource` command creates a source line to cite the source material of the table.¹⁰

`\tablenote` The optional `\tablenote` command allows the inclusion of a footnote belonging to the table. It can be repeatedly used for each footnote accompanying the table.¹¹

For each table, both `\tablesource` and `\tablenote` must be located inside the `table` environment, after the table itself.

The following is an example accompanying the use of the `tabular` environment:

```
\begin{table}
...
\end{tabular}
\footnotesize
\tablesource{\emph{Source:} Citation for the table.}
\tablenote{Note related to the table.}
\tablenote{Another note.}
...
\end{table}
```

4.5 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.¹²

`\frontmatter` The front matter is declared with the `\frontmatter` command. Page headers and footers are empty using the `empty` page style (refer to section 5). The numbering of pages in the front matter begins with the title page, although page numbers are

⁹ Turabian, 367.

¹⁰ Ibid., 361–362.

¹¹ A footnote mark, however, is not generated by the `\tablenote` command. This must either be done manually or through the use of another package.

¹² Turabian, 377.

not placed on pages until the table of contents.¹³

<code>\tableofcontents</code>	The <code>\tableofcontents</code> command is used to place the table of contents in the front matter. With the use of this command, page numbering appears on pages with the table of contents and subsequent pages of the front matter. Page numbers use roman numerals and are placed in centre of the footer using the <code>plain</code> page style (refer to section 5). ¹⁴
<code>\mainmatter</code>	The main matter (or text of the paper) begins with the <code>\mainmatter</code> command. Page numbering restarts with arabic numerals, beginning with page 1. Page numbers are placed on the right-side of the header, using the <code>headings</code> page style (with the exception of the first page of each chapter, instead using the <code>plain</code> page style). ¹⁵
<code>\backmatter</code>	The back matter is declared using the <code>\backmatter</code> command. Page numbering and page styles are continued from the main matter. ¹⁶

5 Page Styles: Headers and Footers

Headers and footers are typset (and can be adjusted) using the page styles produced by the `fancyhdr` package. The following are used with both `\pagestyle` and `\thispagestyle` commands.

fancy: The default page style places a page number in the right-hand corner of the header. A page identifier and/or draft indicator can also be added to the header (refer to subsections 4.1 and 4.2).

empty: An empty page style with no headers or footers. Neither a page identifier nor draft indicator is placed in either the 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 4.5). Neither a page identifier nor draft indicator is placed in either the header or footer.

headings: Places a page number in the right corner of the header (the default style is identical to `fancy`). And as with `fancy`, a page identifier and/or draft indicator can also be added to the header.

¹³Turabian, 386–387.

¹⁴Ibid., 387.

¹⁵Ibid., 391.

¹⁶Ibid., 399.

6 Required Packages

This package requires L^AT_EX2e and makes use of the following packages installed as part of a standard L^AT_EX distribution: `setspace`, `xifthen`, `etoolbox`, `geometry`, `nowidow`, `url`, `footmisc`, `fancyhdr`, `titlesec`, `quoting`, `flafter`, and `caption`.

7 Known Bugs

2014/12/07

Using the `geometry` package's `showframe` formatting option with the `emptyargins` formatting option, when making adjustments to the header and/or footer of the `plain` page style, will not render properly.

2014/12/07

The `endnotesonly` option generates an error if a cite key contains an underscore character, “_”, when used with the `biblatex-chicago` package.

8 Sample Code

Sample 1: A Research Paper with L^AT_EX

Creating a research paper using L^AT_EX and the `turabian-researchpaper` document class.

L^AT_EX code:

```
\documentclass{turabian-researchpaper}

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

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

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

\begin{document}
  \maketitle
  ...
  \printbibliography
\end{document}
```

Sample 2: A Research Paper with X_YL^AT_EX

Creating a research paper using X_YL^AT_EX and the `turabian-researchpaper` document class.

X_YL^AT_EX code:

```
\documentclass{turabian-researchpaper}

\usepackage{polyglossia, fontspec}
\setmainlanguage{english}
\defaultfontfeatures{Ligatures=TeX}
\usepackage{csquotes}

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

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

\begin{document}
  \maketitle
  ...
  \printbibliography
\end{document}
```

Sample 3: A Research Paper with X_YL^AT_EX

An alternative way to create a research paper using X_YL^AT_EX, the `article` document class, and the `turabian-formatting` package.

The `emptymargins` formatting option, from the `turabian-formatting` package, is specified (refer to subsection 3.2).

The main font, using the `fontspec` package, is set to Times New Roman.

X_YL^AT_EX code:

```
\documentclass[12pt]{article}

\usepackage{polyglossia, fontspec}
\setmainlanguage{english}
\defaultfontfeatures{Ligatures=TeX}
\usepackage{csquotes}

\usepackage[emptymargins]{turabian-formatting}

\setmainfont{Times New Roman}

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

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

\begin{document}
  \maketitle
  ...
  \printbibliography
\end{document}
```