

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 L^AT_EX commands. As such, formatting research papers, theses, and dissertations should require a minimum amount of changes to a standard L^AT_EX 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 Package and Document Classes

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

1.1 Package for Turabian-Style Formatting

`turabian-
formatting`

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

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

Do not use this approach if the document class is either `turabian-researchpaper` or `turabian-thesis`.¹

This package should, also, always be loaded *before* loading the `biblatex-chicago` package.

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

1.2 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.

1.3 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. 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.

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). Paragraph indentation is set to 0.5 inches.

2.1 Standard Options for Document Classes

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

² Neither the `notitlepage` nor the `twocolumn` options, however, are supported by either document class.

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`.

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

2.2 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. (Refer to section 3.2 for typesetting headers and footers.)

`emptymargins`

The `emptymargins` 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.

Using the `emptymargins` option, however, reduces the text height (`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 `emptymargins` option allows for pages to have either a header or a footer on a page—although not both on the same page. Empty pages have neither a header nor a footer (refer to section 3.2).

2.3 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 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.

³ The `turabian-thesis` document class has an additional binding offset of 0.5 inches, effectively creating a left/inside margin of $1\frac{1}{2}$ inches. The binding offset can be adjusted through the `geometry` package by using the `bindingoffset` option of the `\geometry` command.

2.4 Support for Endnotes

Endnotes can be used instead of footnotes by loading the `endnotes` package in the L^AT_EX document source preamble.⁴

`endnotes`

Formatting support for the `endnotes` package can be enabled using the `endnotes` option. With the `endnotes` option, footnotes are restarted on each page and labelled using symbols in the sequence of: * † ‡ § (Turabian 2013, 156). More so, each endnote is single-spaced with a “blank line between notes.” The list of endnotes is labelled *Notes*.⁵ Numbering of endnotes is also restarted for each chapter with subheadings dividing the list by each chapter (157).

To place the *Notes* list, use the `\theendnotes` command provided by the `endnotes` package.

2.5 Adjusting Bibliography Formatting

For citations, this package is designed to work well with the `biblatex-chicago` package. This includes support for both the Notes-Bibliography and Author-Date styles (the former being the default style).⁶

`noadjustbib`

Formatting support that adjusts the Bibliography, generated by `biblatex-chicago`, can be disabled using the `noadjustbib` formatting option. This option is only available when loading `turabian-formatting` as a package. The following code is affected by this option:

```
\AtBeginBibliography{\vspace*{-0.333\baselineskip}}
\renewcommand{\bibsetup}{\singlespacing}
\renewcommand{\bibitemsep}{1\baselineskip}
\renewcommand{\bibhang}{0.5in}
```

⁴ When using the `endnotes` package, cite keys must not contain an underscore character, “_”.

⁵ The *Notes* heading is typeset using either `\chapter*` or `\section*`, depending upon the document class.

⁶ To maintain this support if `turabian-formatting` is loaded as a package, the package should always be loaded *before* loading the `biblatex-chicago` package. If `biblatex-chicago` is loaded, the following options are passed to it: `isbn=false`, `autolang=other`, `footmarkoff`, and `backend=biber`. If the `endnotes` option is enabled for `turabian-formatting`, then `notetype=endonly` is also passed to the `biblatex-chicago` package.

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

`\chapter` The `\chapter` command starts a new page and creates a *Chapter* 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).

`\chapter*` `\chapter*`, unlike `\chapter`, does not provide a line with a *Chapter* label and numbering nor is it included in the Table of Contents.⁷ This is useful for the titles/headings of specific elements, including the *Introduction* (390), *Abstract* (389), *Conclusion* (398), *Appendixes* (398), *Notes* (399), and *Bibliography* (401).

Sections and Subsections

`\section`
`\subsection`
`\subsubsection` This package provides support for three levels of sections and subsections: `\section`, `\subsection`, and `\subsubsection` (including their asterisked versions). These section and subsection commands do not provide any label or numbering.

`\section` places “more space before a subhead than after (up to two blank lines before and one line, or double line spacing, after)” (393).

`\section*` If the document class does not define chapter headings, `\section*` 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 the *Introduction* (390), *Notes* (399), and *Bibliography* (401).

⁷ 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. The same applies to the `\theendnotes` command from the `endnotes` package.

3.2 Page Styles: Headers and Footers

`\pagestyle`
`\thispagestyle`

Headers and footers are determined by the specific page styles. They are used with the `\pagestyle` and `\thispagestyle` commands.

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.

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).

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).

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 (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) (Turabian 2013, 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

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

The `turabian-researchpaper` document class produces a title page intended for research papers. Page numbering begins immediately following the title page.

`\title`
`\subtitle`
`\author`
`\date`
`\course`
`\institution` `\maketitle` uses information specified in the source document preamble, through the following commands (each of which is self-evident): `\title`, `\author`, `\date`, `\subtitle`, `\course`, and `\institution`.

The `turabian-thesis` document class provides a “model” title page intended for a thesis or dissertation—a title page different than one intended for a research paper. The title page of a thesis/dissertation is included in the page numbering of the front matter (376, 378).⁸

`\faculty`
`\mydegree`
`\department`
`\location` The following commands are available only with a title page for `turabian-thesis`: `\faculty`, `\mydegree`, `\department`, and `\location`.

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

⁸ When `turabian-formatting` is loaded as a package, the default title page created is for that of a research paper. The “model” title page for theses/dissertations is only available to the `turabian-thesis` document class.

3.5 Table Footnotes

A table is described as having 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” (Turabian 2013, 366).

`\tablenote`

The optional `\tablenote` command provides formatting for each table footnote. It can be repeatedly used for each footnote accompanying a table.⁹

For each table, `\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
\tablenote{\emph{Source:} Citation for the table.}
\tablenote{\emph{Note:} A note related to the table.}
...
\end{table}
```

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: `setspace`, `xifthen`, `etoolbox`, `geometry`, `nowidow`, `footmisc`, `fancyhdr`, `titlesec`, `quoting`, `flafter`, `caption`, `endnotes`, `url`, `chngcntr`, and `xparse`.

The following packages are highly recommended: `biblatex-chicago` and `ellipsis`.

The `emptypage` package is also helpful in making empty pages without header and footers when using the `twoside` document class option.

⁹ A footnote mark for specific parts, however, is *not* generated by the `\tablenote` command. This must either be done manually or through the use of another package.

5 Updates

- 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*.

6 Known Bugs

The `endnotes` option generates an error if a cite key contains an underscore character (`_`) when used with the `biblatex-chicago` package.

Table captions, when the table is positioned at the top of a page, will have an additional vertical space of `0.5\baselineskip` between the caption text and the top margin.

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.

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[title=Bibliography]

\end{document}
```