

Turabian Formatting for L^AT_EX

Omar Abdool

turabian.formatting@gmail.com

July 18, 2016

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).

Contents

1	Document Classes (Getting Started)	3
1.1	Research Papers	3
1.2	Theses/Dissertations	3
2	Formatting Options	4
2.1	Standard Options for Document Classes	4
2.2	Ragged Right (Left Align) Text	5
2.3	Notes-Bibliography and Author-Date Styles	5
2.4	Endnotes	6
3	Formatting Commands	7
3.1	Chapters	7
3.2	Sections and Subsections	7
3.3	Page Styles: Headers and Footers	8
3.4	Front Matter, Main Matter, and Back Matter	8
3.5	Title Page	9
3.6	Table of Contents	10
3.7	List of Figures, Tables, or Illustrations	10
4	Formatting Environments	11
4.1	Block Quotations	11
4.2	Appendixes	11
5	Required and Recommended Packages	12
6	Updates	13
	Appendix: Sample Code for a Research Paper	16

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 Document Classes (Getting Started)

A document may be formatted using `turabian-formatting` in one of two ways: either (1) specifying the document class as a turabian-formatted research paper (`turabian-researchpaper`), or (2) specifying the document class as a thesis/dissertation with turabian-style formatting (`turabian-thesis`).

1.1 Research Papers

`turabian-researchpaper`

The `turabian-researchpaper` document class provides formatting specific to research papers and is based upon the `article` document class.

When placed in the source document preamble (your `.tex` file), the following specifies the document class as `turabian-researchpaper`:

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

1.2 Theses/Dissertations

`turabian-thesis`

The `turabian-thesis` document class offers formatting specific to theses and dissertations. It is based upon the `book` document class.

This document class provides additional support for chapter headings as well as formatting commands to structure the document into front matter, main matter, and back matter (refer to subsections 3.1 and 3.4).

When placed in the source document preamble, the following specifies the document class as `turabian-thesis`:

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

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).¹ 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 1½ inches.

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 (373). This package also supports `normal` font sizes of `10pt` and `11pt`.

The default page size, for both document classes, is 8½ × 11 inches (US Letter size, specified as `letterpaper`). Other paper size options can be specified instead, including `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`. The `twoside` option is also supported.

¹ Double-spaced text is typeset with a `\baselinestretch` of 2 using the `setspace` package.

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” (Turabian 2013, 404). For ragged right formatting without hyphenations throughout the work, use the `raggedright` formatting option.²

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 by `turabian-formatting` to the `\printbibliography` command 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 Alternatively, placing the `\raggedright` command in the document preamble will have the same effect as using the `raggedright` option. The `\raggedright` command, however, does not pass a `raggedright` option to other loaded packages.

2.4 Endnotes

endnotes

Although footnotes are used by default, endnotes can be used by specifying the `endnotes` formatting option. Through this option, the `endnotes` package is loaded.

With the `endnotes` option, footnotes are 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*.³

When used with `turabian-thesis`, the numbering of endnotes is restarted at the beginning of each chapter. In this case, the endnotes list then uses subheadings that divide endnotes by each chapter (157).

³ The *Notes* heading, when using the `turabian-researchpaper` document class, is typeset with `\section*`. The `turabian-thesis` document class, however, typesets the *Notes* heading with `\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 Chapters

`\chapter{}` A thesis or dissertation can be divided into chapters using the `\chapter` command.

The `\chapter` command starts a new page with a “descriptive title” of the chapter separated from the first line of following text by “two blank lines.” If located in the main matter (refer to subsection 3.4), the “descriptive title” will be preceded by a *Chapter* label “followed by the chapter number at the top of the page” in arabic numerals; separated by a blank line (Turabian 2013, 391).

If the `\chapter` command is placed inside the `appendixes` environment, chapter numbering is restarted and an *Appendix* label followed by single capitalized letters of the alphabet is used instead (refer to subsection 4.2).

`\chapter*{}` `\chapter*`, unlike `\chapter`, does not provide a line with a *Chapter* label and numbering nor is it included in the table of contents.⁴

3.2 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).

If the `\section` command is placed inside the `appendixes` environment, section numbering is restarted and an *Appendix* label followed by single capitalized letters of the alphabet is used instead (refer to subsection 4.2).

`\section*{}`
`\noadjustssect` When used with `turabian-researchpaper`, the `\section*` command places two blank lines between the title/subheading and the first line of text. This is particularly useful for the subheadings of specific elements, including *Introduction*, *Notes*, and *Bibliography* (390–401). Inserting the `\noadjustssect` command in the document preamble will disable this behaviour.

⁴ 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.

3.3 Page Styles: Headers and Footers

Headers and footers 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 (Turabian 2013, 372, 374).

`\pagestyle{}`
`\thispagestyle{}`

The layout of the headers and footers are determined by the page styles specified using the `\pagestyle` and `\thispagestyle` commands.⁵ This package provides the following page styles:

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 3.4).

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

3.4 Front Matter, Main Matter, and Back Matter

A thesis/dissertation can be divided into three, distinct components: (1) front matter, (2) main matter or text of the paper, and (3) back matter (375). As such, the `\frontmatter`, `\mainmatter`, and `\backmatter` commands are supported by the `turabian-thesis` document class.

Front Matter

`\frontmatter`

The front matter begins with the `\frontmatter` command. Page numbering starts with the title page. Page numbers do not appear in the headers or footers of pages in the front matter, as the `\frontmatter` command sets `\pagestyle` to `empty` (373–374, 376).

Page numbers, however, do appear on pages that follow the `\tableofcontents` command when typesetting the table of contents (refer to subsection 3.6).

⁵ 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).

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).

3.5 Title Page

The `turabian-researchpaper` document class provides a title page intended for research papers. 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 the `\thanks` command) 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). 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.

`\course{}` `turabian-researchpaper` provides the optional `\course` command for typesetting course information (such as the name of the course).

`\institution{}`
`\department{}`
`\location{}` `turabian-thesis` also provides: (1) `\institution` for typesetting the institution at the top of the page, (2) for typesetting the name of the department, and (3) `\location` for typesetting a location just above the date.

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

3.6 Table of Contents

`\tableofcontents` The `\tableofcontents` command creates a table of contents with the first page labelled *Contents*. Items within the table of contents are single-spaced with “a blank line after each item.” The front matter and back matter are each separated from the main matter by two blank lines. By default, subheadings are not included in the table of contents (Turabian 2013, 380).⁶

Placing the `\tableofcontents` command in the front matter of a thesis/dissertation will cause page numbers to appear on pages within the table of contents and subsequent pages of the front matter. These page numbers use roman numerals and are placed in the centre of the footer using the `plain` page style (373–374; refer to subsection 3.3).

3.7 List of Figures, Tables, or Illustrations

The `turabian-formatting` package provides support for the `figure` and `table` environments. Figures are numbered separately from tables and, both, in the order in which they are mentioned in the text (363, 369).

With `turabian-researchpaper`, both figures and tables are numbered consecutively, throughout the paper (e.g. “Figure 6”). The `turabian-thesis` document class, however, uses double numeration for both figures and tables: the chapter number followed by a period and a figure/table number that restarts with each chapter (e.g. “Figure 3.2”).⁷

`\listoffigures` Support is provided for both the `\listoffigures` and `\listoftables` commands.
`\listoftables` The list of figures is labelled *Figures*; the list of tables is labelled *Tables*. Individual items listed are single-spaced with a blank line between each item (383).

`\listofillustrations` The `\listofillustrations` command creates a combined list of figures and tables with the first page labelled *Illustrations*. This list, however, is divided into two sections labelled *Figures* and *Tables*. Individual items listed within each section are single-spaced with a blank line between each item (383).

⁶ To add subheadings to the table of contents, increase the `tocdepth` counter.

⁷ Within the `appendixes` environment, figures and tables are both numbered with an “A” prefix followed by a period and a figure/table number that does *not* restart with each appendix (e.g. “Table A.4”).

4 Formatting Environments

4.1 Block Quotations

quotation

Block quotations are typeset using the `quotation` environment. Each block quotation is single-spaced and leaves a blank line both before and after it. The entire quotation is indented as far as the indentation of the first line of a paragraph (Turabian 2013, 349).

```
\begin{quotation}
  \langle Text being quoted. \rangle
\end{quotation}
```

By default, the block quotation is also indented by the same amount (`0.5in`) on the right side. When using the `raggedright` option (or the `\raggedright` command), however, the block quotation is not indented on the right side (refer to subsection 2.2).

4.2 Appendixes

When “supporting material cannot be easily worked into the body of your paper,” the manual recommends putting the material “in one or more appendixes in the back matter” (398).

If only one appendix is needed, the first page is to be labelled *Appendix* with “two blank lines between the title and the first line of text or other material” (398). This can be accomplished with a regular chapter or section heading (i.e. `\chapter{Appendix}` or `\section*{Appendix}`).

appendixes

For more than one appendix, place the material inside the `appendixes` environment. As an example:

```
\begin{appendixes}
  \langle Material belonging to the appendixes. \rangle
\end{appendixes}
```

The headings of each appendix use an *Appendix* prefix accompanied by a single, capitalized letter from the alphabet (in sequential order, starting with A). The descriptive title is placed on the next line (399). For `turabian-thesis`, each chapter (using the `\chapter` command) within the `appendixes` environment functions as a separate appendix. Similarly, with `turabian-researchpaper`, the `\section` command is used to denote a new appendix.

5 Required and Recommended Packages

This package requires \LaTeX 2e and makes use of the following packages installed as part of a standard \LaTeX distribution: `etoolbox`, `setspace`, `nowidow`, `footmisc`, `endnotes`, and `xparse`.

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

6 Updates

2016/07/18	<p>Improvements to <code>figure</code> and <code>table</code> counters and number formatting.</p> <p>Loading <code>turabian-formatting</code> as a package is no longer supported.</p>
2016/07/12	<p>Re-implementation of the <code>\raggedright</code> command as an alternative to using the <code>raggedright</code> option.</p> <p>Improvements to the <code>\tableofcontents</code>, <code>\listoffigures</code>, and <code>\listoftables</code> commands with support for the <code>tocloft</code> package.</p> <p>Added the <code>\listofillustrations</code> command.</p> <p>Added an <code>appendixes</code> environment to support formatting of appendixes.</p> <p>Support for changes made to the <code>biblatex-chicago</code> package.</p> <p>Removed commands: <code>\tablenote</code>, <code>\tablesource</code>, <code>\faculty</code>, and <code>\mydegree</code>.</p> <p>Removed options: <code>emptymargins</code>.</p>
2016/03/18	<p>Support for changes made to the <code>biblatex</code> package (2016/03/03).</p>
2016/03/15	<p>An <code>authordate</code> option has been added, improving support for the author-date citation style.</p> <p>Adjustments to the formatting of both enumerated and itemized lists.</p> <p>The <code>endnotes</code> option has (1) added support for endnotes that contain an underscore character (<code>_</code>), and (2) improved the implementation of the <code>\theendnotes</code> command.</p>
2016/02/27	<p>This update is a significant rewrite of <code>turabian-formatting</code>. It is designed to be faster and require fewer packages.</p> <p>Both <code>turabian-researchpaper</code> and <code>turabian-thesis</code> can use the <code>noadjustbib</code> option.</p> <p>Significant adjustments made to the <code>\maketitle</code> command, including support for footnotes.</p> <p>Double-spaced text is typeset with a <code>\baselinestretch</code> of 2 using the <code>\setstretch</code> command provided by the <code>setspace</code> package (instead of <code>\doublespacing</code>). This</p>

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}
```