The biblatex-chicago package:
15th-edition style files for biblatex

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Contents

1 Notice

This file documents the **biblatex** style files implementing the 15th edition of *The Chicago Manual of Style*. This edition has been superseded by the 16th edition, documented in **biblatex-chicago.pdf**. There may still be some users, however, who wish to continue using the 15th-edition styles, so I am continuing to provide them, though I am now marking them as "strongly deprecated," and will soon mark them as "obsolete." I have included very few fixes in this release cycle, enough so that my test files do still compile correctly. The main reason to continue using these files is perhaps a desire not to interrupt a work-in-progress. Given how little attention they are currently receiving, however, I encourage all users of both the **authordate15** and **notes15** styles to upgrade to the current release of the 16th-edition styles as soon as may be practicable. If the changes to the author-date style's treatment of titles has thus far discouraged you from upgrading, please be aware that the new authordate-trad style retains the traditional Chicago sentence-style capitalization (and absence of quotation marks) in titles while in all other respects adhering to the 16th-edition specification. I can't promise that switching to a newer style will be entirely painless, but if you read through the RELEASE file you'll find that it won't, under ordinary circumstances, require Herculean efforts.

The package remains beta software. If it seems like it could be of use to you, yet it doesn't do something you need/want it to do, please feel free to let me know, and of course any suggestions for solving problems more elegantly or accurately would be most welcome.

Important Note: If you have used biblatex-chicago before, please make sure you have read the RELEASE file that came with the package. It details the changes you'll need to make to your .bib database in order for it to work properly with this release. If you are new to these styles, please read on.

2 Quickstart

The biblatex-chicago package is designed for writers who wish to use LaTeX and biblatex, and who either want or need to format their references according to one of the specifications defined by the *Chicago Manual of Style*. This package includes both the *Manual's* "author-date" system, favored by many disciplines in the sciences and social sciences, and its "notes & bibliography" style, generally favored in the humanities. The latter code produces a full reference in a first footnote, shorter references in subsequent notes, and a full reference in the bibliography. Some authors prefer to use the shorter note form even for the first occurrence, relying on the bibliography to provide the full information. This, too, is supported by the code. The author-date style produces a short, in-text citation inside parentheses — (Author Year) — keyed to a list of references where entries start with the same name and year.

The documentation you are reading covers both of these Chicago styles and their variants. Much of what follows is relevant to all users, but I have decided, after some experimentation, to keep the instructions for the two styles separate, at least in sections 4 and 5. Information provided under one style will often duplicate that found under the other, but efficiency's loss should, I hope, be clarity's gain, and much of what you learn using one style will be applicable without alteration to the other. Throughout the documentation, any green text indicates something new in this release.

New!

Here's a list of things you will need in order to use biblatex-chicago:

- Philipp Lehman's biblatex package, of course! You should use the latest version(s) — 1.7 or 2.9a — as those versions have been tested more thoroughly than any other, meaning that these style files may well not function properly with earlier iterations of biblatex. Lehman's tools require several packages, and he strongly recommends several more:

  - e-TeX (required)
  - etoolbox — available from CTAN (required)
  - keyval — a standard package (required)
  - ifthen — a standard package (required)
  - url — a standard package (required)
  - babel — a standard package (*strongly* recommended)
  - csquotes — available from CTAN (recommended). Please upgrade to the latest version of csquotes (5.1b).
  - bibtex8 — a replacement for BibTeX, which can, with the right command-line switches, process very large .bib files. It also does the right thing when alphabetizing non-ASCII entries. It is available from CTAN, but please be aware that this database parser no longer suffices if you are using the Chicago author-date style with any version of biblatex from version 1.5 onwards. For that style you must use the following:
  - Biber — the next-generation BibTeX replacement, which is available from SourceForge. You should use the latest version, 1.9, to work with biblatex 2.9a, and it is required for users who are either using the author-date style or processing a .bib file in Unicode. See cms15-dates-sample.pdf for more details.

- The line:

      \usepackage[notes15]{biblatex-chicago}

  in your document preamble to load the 15th-edition notes & bibliography style, or the line:

```
\usepackage[authordate15,backend=biber]{biblatex-chicago}
```

to load the 15th-edition author-date style. Any other options you usually pass to biblatex can be given to biblatex-chicago instead, but loading it this way sets up a number of other parameters automatically. You can also load the package via the traditional \usepackage{biblatex}, adding `style=chicago-notes15` or `style=chicago-authordate15`, but these are mainly for those who wish to set much of the low-level formatting of their document themselves. Please see sections 4.5.1 and 5.5.1 below for a fuller discussion of the issues involved here.

- You can use \usepackage[notes15,short]{biblatex-chicago} to get the short note format even in the first reference of a notes & bibliography document, letting the bibliography provide the full reference.

- If you are accustomed to using the natbib compatibility option with biblatex, then you can continue to do so with biblatex-chicago. If you are using \usepackage{biblatex-chicago} to load the package, then the option must be the plain `natbib` rather than `natbib=true`. If you use the latter, you'll get a keyval error. Please see sections 4.4.3 and 5.4.3, below.

- By far the simplest setup is to use babel, and to have american as the main text language. As before, babel-less setups, and also those choosing english as the main text language, should work out of the box. Biblatex-chicago also now provides support for German and French. Please see below (section 6) for a fuller explanation of all the options.

- The chicago-notes15.bbx, chicago-notes15.cbx, chicago-authordate15.cbx, chicago-authordate15.bbx, biblatex-chicago.sty, cms-american.lbx, cms-french.lbx, cms-german.lbx, and cms-ngerman.lbx files from biblatex-chicago, installed either in a system-wide TeX directory, or in the working directory where you keep your *.tex files. The .zip file from CTAN contains several subdirectories to help keep the growing number of files organized, so the files listed above can be found in the `latex/` subdirectory, itself further divided into the `bbx/`, `cbx/`, and `lbx/` subdirectories. If you install in a system-wide directory, I recommend following standard advice and using `<TEXMFLOCAL>/tex/latex/biblatex-contrib/biblatex-chicago`, where `<TEXMFLOCAL>` is the root of your local TeX installation — for example, and depending on your system and preferences, `/usr/share/texmf-local`, `/usr/local/share/texmf`, or `C:\Local TeX Files\`. Then you can copy the contents of the `latex/` directory there, subdirectories and all. (If you install into your working directory, then you'll need to copy the files directly there, without subdirectories.) Of course, if you choose to place them anywhere in the `texmf` tree, you'll need to update the file name database to make sure TeX can find them.

- Philipp Lehman's very clear and detailed documentation of the biblatex system, available in his package as biblatex.pdf. Here he explains why you might want to use the system, the rules for constructing .bib files for it, and the (numerous) methods at your disposal for modifying the formatted output.

- The annotated bibliography files notes-test.bib and dates-test.bib, which will acquaint you with most of the details on how to get started constructing your own .bib files for use with the two biblatex-chicago styles.

- The files cms15-notes-sample.pdf and cms15-dates-sample.pdf. The first shows how my system processes notes-test.bib and cms15-notes-sample.tex, in both footnotes and bibliography, the second is the result of processing dates-test.bib and cms15-dates-sample.tex. All of these files are in `doc/examples/`.

- The file you are reading, biblatex-chicago15.pdf, which aims to be as complete a description as possible of the rules for creating a .bib file that will, when processed by LaTeX and BibTeX, at least somewhat ease the burden when you try to implement the *Chicago Manual of Style*'s specifications. These docs may seem frustratingly over-long, but remember that you only need to read the part(s) that apply to the style in which you are interested. Much of the information in section 4 is duplicated in section 5, so even if you have a need for both styles then using one will be excellent preparation for the other. If you have used a previous version of this package, please pay particular attention to the sections on Obsolete and Deprecated Features, starting on page 104. You will find the seven previous files in the `doc/` subdirectory once you've extracted biblatex-chicago.zip. If you wish to place them in a system-wide directory, I would recommend `<TEXMFLOCAL>/doc/latex/biblatex-contrib/biblatex-chicago`, all the while remembering, of course, to update the file name database afterward. (Let me reiterate, also, that if you currently have quoted material in your .bib file, and are using `\enquote` or the standard LaTeX mechanisms there, then the simplest procedure is always to use `\mkbibquote` instead in order to ensure that punctuation works out right.)

- Access to a copy of *The Chicago Manual of Style* itself, which naturally contains incomparably more information than I can hope to present here. It should always be your first port of call when any doubts arise as to exactly what the specification requires.

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2.2 Acknowledgements

Even a cursory glance at the cbx and bbx files in the package will demonstrate how much of Lehman's code from biblatex I've adapted and re-used, and I've also followed some of the advice he gave to others in the `comp.text.tex` newsgroup. He has been instrumental in improving the contextual capitalization procedures of which the style makes such frequent use, and his advice on constructing biblatex-chicago.sty was invaluable. The code for formatting the footnote marks, and that for printing the separating rule only after a run-on note, I've adapted from the footmisc package by Robin Fairbairns, and I've borrowed ideas for the `shorthandibid` option from Dominik Waßenhoven's biblatex-dw package. I am very grateful to Baldur Kristinsson for providing the Icelandic localization, and to Håkon Malmedal for the Norwegian localizations. Kazuo Teramoto and Gildas Hamel both sent patches to improve the package, and there may be other LaTeX code I've appropriated and forgotten, in which case please remind me. Finally, Charles Schaum and Joseph Reagle Jr. were both extremely generous with their help and advice during the development of this package, and have both continued indefatigably to test it and suggest needed improvements. They were particularly instrumental in encouraging the greatest possible degree of compatibility with other biblatex styles. Indeed, if the task of adapting .bib files for use with the Chicago style seems onerous now, you should have tried it before they got their hands on it.

3 Detailed Introduction

The *Chicago Manual of Style*, implemented here in its 15th edition, has long, in America at least, been one of the most influential style guides for writers and publishers. While one's choices are now perhaps more extensive than ever, the *Manual* at least still provides a widely-recognized, and widely-utilized, standard. Indeed, when you add to this the sheer completeness of the specification, its detailed instructions for referencing an enormous number of different kinds of source material, then your choice (or your publisher's choice) of the *Manual* as a style guide seems set to be a happy one.

These very strengths, however, also make the style difficult to use. Admittedly, the *Manual* does leave room for "inventive solutions" to particular problems (17.2), and it also emphasizes consistency within a work, as opposed to rigid adherence to the specification, at least when writer and publisher agree (17.18). Sometimes a publisher demands such adherence, however, and anyone who has attempted to produce it may well come away with the impression that the specification itself is somewhat idiosyncratic in its complexity, and I can't help but agree. In the notes & bibliography style, the numerous differences in punctuation (and strings identifying translators, editors, and the like) between footnotes and bibliographies and the sometimes unusual location of page numbers; in both styles the distinction between "journal" and "magazine," and the formatting differences between (e.g.) a work from antiquity and one from the Renaissance, all of these tend to overburden the writer who wants to comply with the standard. Many of these complexities, in truth, make the specification very nearly impossible to implement straightforwardly in a system like BIBTEX — options multiply, each requiring a particular sort of formatting, until one almost reaches the point of believing that every individual book or article should have its own entry type. Completeness and usability tend each to exclude the other, so the code you have before you is a first attempt to achieve the former without utterly sacrificing the latter.

What biblatex-chicago can and can't do

In short, the biblatex style files in this package try to simplify the task of following the two Chicago specifications. In the notes & bibliography style, the two sorts of reference are treated separately (as are the two different note forms, long and short), and you can choose always to use the short note form, even at the first citation. In the author-date style, a series of options allows you to choose which date (original printing, reprint, or both) appears in citations and at the head of entries in the list of references. In both styles, punctuation is placed within quotation marks when needed, and as a general rule as many parts of the style as possible are implemented as transparently as possible. Thanks to advice I received from Joseph Reagle Jr. and Charles Schaum while these files were a work in progress, I have attended as carefully as I can to backward compatibility with the standard biblatex styles, and have attempted to minimize both any changes you need to make to achieve compliance with the Chicago specification, and indeed also any changes necessary to switch between the two Chicago styles. There is no doubt room for improvement on this score, but even now, for a substantial number of entries, any well-constructed .bib file that works for other biblatex styles will "just work" under biblatex-chicago. By no means, however, will all entries in such a .bib file produce equally satisfactory results. Using this documentation and the examples in dates-test.bib and/or notes-test.bib, it should be possible to achieve compliance, though the amount of revision necessary to do so will vary significantly from .bib file to .bib file. Conversely, once you have created a database for biblatex-chicago, it won't necessarily work well with other biblatex styles. Indeed, most, quite possibly all, users will find that they need to use special formatting macros within the .bib file that would make such a file unusable in any other context. I strongly recommend, if you want to experiment with this style, that you work on a copy

of any .bib files that are important to you, until you have determined that this package does what you need/want it to do.

When I first began working on this package, I made the decision to alter as little as possible the main files from Lehman's biblatex, so that my .bbx and .cbx files would use his original LaTeX .sty file and BibTeX .bst file. As you proceed, you will no doubt encounter some of the consequences of this decision, with certain fields and entry types in the .bib file having less-than-memorable names because I chose to use the supplementary ones provided by biblatex.bst rather than alter that file. I intended then, if it turned out that anyone besides myself actually used biblatex-chicago, to ask Mr. Lehman to include more descriptive names for these few entry types and fields in biblatex.bst, if he were willing. As luck would have it, several new types appeared in biblatex 0.8, many of which I have incorporated as replacements for the custom entry types I defined before. If a consensus emerges about how best to assign the data to various fields in such entries, then I shall adopt it. In the meantime, as you will see below, I have made two of the old custom types obsolete, and recycled the third for an entirely new purpose. Needless to say, I'm open to advice and suggestions on this score.

4 The Specification: Notes & Bibliography

In what follows, I attempt to explain all the parts of biblatex-chicago-notes that might be considered somehow "non standard," at least with respect to the styles included with biblatex itself, though in the section on entry fields I have also duplicated a lot of the information in biblatex.pdf, which I hope won't badly annoy expert users of the system. Headings in green indicate material new to this release, or occasionally old material that has undergone significant revision. Numbers in parentheses refer to sections of the *Chicago Manual of Style*, 15th edition. The file notes-test.bib contains many examples from the *Manual* which, when processed using biblatex-chicago-notes, should produce the same output as you see in the *Manual* itself, or at least compliant output, where the specifications are vague or open to interpretation, a state of affairs which does sometimes occur. I have provided cms-notes-sample.pdf, which shows how my system processes notes-test.bib, and I have also included the reference keys from the latter file below in parentheses.

New in this release (margin note)

4.1 Entry Types

The complete list of entry types currently available in biblatex-chicago-notes, minus the odd biblatex alias, is as follows: **article**, **artwork**, **audio**, **book**, **bookinbook**, **booklet**, **collection**, **customc**, **image**, **inbook**, **incollection**, **inproceedings**, **inreference**, **letter**, **manual**,**misc**, **music**, **online** (with its alias **www**), **patent**, **periodical**, **proceedings**, **reference**, **report** (with its alias **techreport**), **review**, **suppbook**, **suppcollection**, **suppperiodical**, **thesis** (with its aliases **mastersthesis** and **phdthesis**), **unpublished**, and **video**.

What follows is an attempt to specify all the differences between these types and the standard provided by biblatex. If an entry type isn't discussed here, then it is safe to assume that it works as it does in the standard styles. In general, I have attempted not to discuss specific entry fields here, unless such a field is crucial to the overall operation of a given entry type. As a general and important rule, most entry types require very few fields when you use biblatex-chicago-notes, so it seemed to me better to gather information pertaining to fields in the next section.

article (margin note) The *Chicago Manual of Style* (17.148) recognizes three different sorts of periodical publication, "journals," "magazines," and "newspapers." The first (17.150) includes "scholarly or professional periodicals available mainly by subscription," while the second refers to "weekly or monthly" publications that are "available either by subscription or in individual issues at bookstores or newsstands."

"Magazines" will tend to be "more accessible to general readers," and typically won't have a volume number. Indeed, by fiat I declare that should you need to refer to a journal that identifies its issues mainly by year, month, or week, then for the purposes of biblatex-chicago-notes such a publication is a "magazine," and not a "journal."

Now, for articles in "journals" you can simply use the traditional BibTeX — and indeed biblatex — article entry type, which will work as expected and set off the page numbers with a colon, as required by the *Manual*. If, however, you need to refer to a "magazine" or a "newspaper," then you need to add an entrysubtype field containing the exact string magazine. The main formatting differences between a magazine (which includes both "magazines" and "newspapers") and a plain article are that the year isn't placed within parentheses, and that page numbers are set off by a comma rather than a colon. Otherwise, the two sorts of reference have much in common. (For article, see *Manual* 17.154–181; batson, beattie:crime, friedman:learning, garaud:gatine, garrett, hlatky:hrt, kern, lewis, loften:hamlet, mcmillen:antebellum, warr:ellison, white:callimachus. For entrysubtype magazine, see 17.166, 17.182–198; assocpress:gun, morgenson:market, reaves:rosen, rozner:liberation, stenger:privacy.)

It gets worse. The *Manual* treats reviews (of books, plays, performances, etc.) as a sort of recognizable subset of "journals," "magazines," and "newspapers," distinguished mainly by the way one formats the title of the review itself. In biblatex 0.7, happily, Lehman provided a review entry type which will handle a large subset of such citations, though not all. The key rule is this: if a review has a separate, non-generic title (gibbard; osborne:poison) in addition to something that reads like "review of . . . ," then you need an article entry, with or without the magazine entrysubtype, depending on the sort of publication containing the review. If the only title is the generic "review of . . . ," for example, then you'll need the review entry type, with or without this same entrysubtype toggle using magazine. On review entries, see below. (The curious reader will no doubt notice that the code for formatting any sort of review still exists in article, as it was initially designed for biblatex 0.6, but this new arrangement is somewhat simpler and therefore, I hope, better.)

In the case of a review with a specific as well as a generic title, the former goes in the title field, and the latter in the titleaddon field. Standard biblatex intends this field for use with additions to titles that may need to be formatted differently from the titles themselves, and biblatex-chicago-notes uses it in just this way, with the additional wrinkle that it can, if needed, replace the title entirely, and this in, effectively, any entry type, providing a fairly powerful, if somewhat complicated, tool for getting BibTeX to do what you want. Here, however, if all you need is a titleaddon, then you want to switch to the review type, where you can simply use the title field instead.

No less than six more things need explication here. First, since the *Manual* specifies that much of what goes into a titleaddon field stays unformatted — no italics, no quotation marks — this plain style is the default for such text, which means that you'll have to format any titles within titleaddon yourself, e.g., with \mkbibemph{}. Second, the *Manual* specifies a similar plain style for the titles of other sorts of material found in "magazines" and "newspapers," e.g., obituaries, letters to the editor, interviews, the names of regular columns, and the like. References may contain both the title of an individual article and the name of the regular column, in which case the former should go, as usual, in a title field, and the latter in titleaddon. As with reviews proper, if there is only the generic title, then you want the review entry type. (See 17.188, 17.190, 17.193; morgenson:market, reaves:rosen.)

Third, the *Manual* suggests that, in the case of "unsigned newspaper articles or features . . . the name of the newspaper stands in place of the author" (17.192). It doesn't always carry through on this in its own presentation of newspaper citations (see esp. 17.188), but I've implemented their recommendation nonetheless,

which means that in an article entry, entrysubtype `magazine`, or in a review entry, entrysubtype `magazine`, and only in such entries, a missing author field results in the name of the periodical (in the journaltitle field) being used as the missing author. If, for reasons of emphasis or merely because of personal preference, you wish to keep the title in initial position, then you need to define the author using, effectively, anything at all, then set `useauthor=false` in the options field. (The `\isdot` macro in the author field no longer works on its own under biblatex 1.6 and later, so you may need to change your .bib files when you upgrade.) Note that if you choose to use the name of the newspaper as an author, then you'll need a sortkey field to ensure that the bibliography entry is alphabetized by journaltitle rather than by title. The provision of a shortauthor field is no longer necessary, as in its absence the package automatically takes it from journaltitle. (See lakeforester:pushcarts.)

Fourth, if you've been using biblatex-chicago-notes for a while, you may remember using the single-letter `\bibstring` mechanism in order to help biblatex decide where to capitalize a wide variety of strings in numerous entry fields. This mechanism was particularly common in all the periodical types, but if you've had a look in notes-test.bib while following this documentation, you'll have noticed that it no longer appears there. The regular whole-word bibstrings still work as normal, but the single-letter ones are now obsolete, replaced by Lehman's macro `\autocap`, which itself only occurs twice in notes-test.bib. Basically, in certain fields, just beginning your data with a lowercase letter activates the mechanism for capitalizing that letter depending on its context within a note or bibliography entry. Please see **\autocap** below for the details, but both the titleaddon and note fields are among those treating their data this way, and since both appear regularly in article entries, I thought the problem merited a preliminary mention here.

Fifth, if you need to cite an entire issue of any sort of periodical, rather than one article in an issue, then the periodical entry type, once again with or without the `magazine` toggle in entrysubtype, is what you'll need. (You can also use the article type, placing what would normally be the issuetitle in the title field and retaining the usual journaltitle field, but this arrangement isn't compatible with standard biblatex.) The note field is where you place something like "special issue" (with the small "s" enabling the automatic capitalization routines), whether you are citing one article or the whole issue (conley:fifthgrade, good:wholeissue). Indeed, this is a somewhat specialized use of note, and if you have other sorts of information you need to include in an article, periodical, or review entry, then you shouldn't put it in the note field, but rather in titleaddon or perhaps addendum (brown:bremer).

Finally, and in the interests of completeness, it may be as well to suggest that if you wish to cite a television or radio broadcast, the article type, entrysubtype `magazine` is the place for it. The name of the program would go in journaltitle, with the name of the episode in title. The network's name now goes into the new usera field, replacing the formatting kludge I suggested in version 0.7. Of course, if the piece you are citing has only a generic name (an interview, for example), then the review type would be the best place for it. (8.196, 17.207; see bundy:macneil for an example of how this all might look in a .bib file.)

If you're still with me, allow me to recommend that you browse through notes-test.bib to get a feel for just how many of the *Manual*'s complexities the article and review (and, indeed, periodical) types attempt to address. It may be that in future releases of biblatex-chicago-notes I'll be able to simplify these procedures somewhat, but in the meantime it might be of some comfort that I have found in my own research that the unusual and/or limit cases are really rather rare, and that the vast majority of sources won't require any knowledge of these onerous details.

artwork Arne Kjell Vikhagen has pointed out to me that none of the standard entry types were straightforwardly adaptable when referring to visual artworks. The

Manual doesn't give any thorough specifications for such references, and indeed it's unclear that it believes it necessary to include them in the bibliographical apparatus at all. Still, it's easy to conceive of contexts in which a list of artworks studied might be desirable, and biblatex includes entry types for just this purpose, though the standard styles leave them undefined. The two I have included in this release are artwork and image, the former intended for paintings, sculptures, etchings, and the like, the latter for photographs. The two entry types work in exactly the same way as far as constructing your .bib entry, and when printed the only difference will be that the titles of artworks are italicized, those of images placed within quotation marks.

As one might expect, the artist goes in author and the name of the work in title. The type field is intended for the medium — e.g., oil on canvas, charcoal on paper — and the version field might contain the state of an etching. You can place the dimensions of the work in note, and the current location in organization, institution, and/or location, in ascending order of generality. The type field, as in several other entry types, uses biblatex's automatic capitalization routines, so if the first word only needs a capital letter at the beginning of a sentence, use lowercase in the .bib file and let biblatex handle it for you. (See *Manual* 12.33; leo:madonna, bedford:photo.)

As a final complication, the *Manual* (8.206) says that "the names of works of antiquity ... are usually set in roman." If you should need to include such a work in the reference apparatus, you can either define an entrysubtype for an artwork entry — anything will do — or you could use the misc entry type with an entrysubtype. Fortunately, in this instance the other fields in a misc entry function pretty much as in artwork or image.

audio For this release of biblatex-chicago, following the request of Johan Nordstrom, I have included three new entry types, all undefined by the standard styles, designed to allow users to present audiovisual sources in accordance with the Chicago specifications. The *Manual's* presentation of such sources (17.263–273), though admirably brief, seems to me somewhat inconsistent. I attempted to condense all the requirements into two new entry types, but ended up relying on three, the differences between which I shall attempt to delineate here. There are likely to be occasions when your choice of entry type is not obvious, but at the very least biblatex-chicago should help you maintain consistency.

The **music** type is intended for all musical recordings that do not have a video component. This means, for example, digital media (whether on CD or hard drive), vinyl records, and tapes. The **video** type includes (nearly) all visual media, whether it be films, TV shows, tapes and DVDs of the preceding or of any sort of performance (including music), or online multimedia. Finally, the **audio** type, our current concern, fills gaps in the two others, and presents its sources in a more "book-like" manner. Published musical scores need this type — unpublished ones would use misc with an entrysubtype (shapey:partita) — as do such favorite educational formats as the slideshow and the filmstrip (greek:filmstrip, schubert:muellerin, verdi:corsaro). The *Manual* (17.269–270) sometimes uses a similar format for audio books and even for films (twain:audio, weed:flatiron), though elsewhere these sorts of material are presented as music and video, respectively. It would appear to depend on which sorts of publication facts you wish to present — cf. *Manual* 17.269.

Once you've accepted the analogy of composer to author, constructing an audio entry should be fairly straightforward, since many of the fields function just as they do in book or inbook entries. Indeed, please note that I compare it to both these other types as, in common with the other audiovisual types, audio has to do double duty as an analogue for both books and collections, so while there will normally be an author, a title, a publisher, a date, and a location, there may also be a booktitle and/or a maintitle — see schubert:muellerin for an entry that uses all three in citing one song from a cycle. If the medium in question needs

specifying, the type field is the place for it. (It is characteristic of this entry type that such information is placed after the publisher information, whereas in the other audiovisual types their order is reversed.) Finally, the titleaddon field can specify functions for which biblatex-chicago provides no automated handling, e.g., a librettist (verdi:corsaro).

bookinbook This type provides the means of referring to parts of books that are considered, in other contexts, themselves to be books, rather than chapters, essays, or articles. (Older versions of biblatex-chicago used **customb** for this purpose, but this is now obsolete.) Such an entry can have a title and a maintitle, but it can also contain a booktitle, all three of which will be italicized when printed. In general usage it is, therefore, rather like the traditional inbook type, only with its title in italics rather than in quotation marks. (See *Manual* 17.72, 17.89, 17.93; bernard:boris, euripides:orestes, plato:republic:gr.)

NB: The Euripides play receives slightly different presentations in 17.89 and 17.93. Although the specification is very detailed, it doesn't eliminate all choice or variation. Using a system like BibTeX should help to maintain consistency.

booklet This is the first of two entry types — the other being manual, on which see below — which are traditional in BibTeX styles, but which the *Manual* (17.241) suggests may well be treated basically as books. In the interests of backward compatibility, biblatex-chicago-notes will so format such an entry, which uses the howpublished field instead of a standard publisher, though of course if you do decide just to use a book entry then any information you might have given in a howpublished field should instead go in publisher. (See clark:mesopot.)

customa This entry type is now obsolete, and any such entries in your .bib file will trigger an error. Please use the standard biblatex **letter** type instead.

customb This entry type is now obsolete, and any such entries in your .bib file will trigger an error. Please use the standard biblatex **bookinbook** type instead.

customc This entry type has undergone a metamorphosis with this release, as I previously warned both here and in the RELEASE file. Rather than being a (deprecated) alias of the standard biblatex **suppbook**, it now allows you to include alphabetized cross-references to other, separate entries in the bibliography, particularly to other names or pseudonyms, as recommended by the *Manual*. (This is different from the usual crossref, xref, and userf mechanisms, all primarily designed to include cross-references to other works. Cf. 17.39–40). The lecarre:cornwell entry, for example, would allow your readers to find the more-commonly-used pseudonym "John Le Carré" even if they were, for some reason, looking under his real name "David John Moore Cornwell."

In such a case, you would need merely to place the author's real name in the author field, and the pseudonym(s), under which his or her works are presented in the bibliography, in the title field. To make sure the cross-reference also appears in the bibliography, you can either manually include the entry key in a \nocite command, or you can put that entry key in the **userc** field in the main .bib entry, in which case biblatex-chicago will print the expanded abbreviation if and only if you cite the main entry. (Cf. lecarre:cornwell, lecarre:quest; userc, below.)

Under ordinary circumstances, biblatex-chicago will connect the two parts of the cross-reference with the word "*See*" — or its equivalent in the document's language — in italics. If you wish to present the cross-reference differently, you can put the connecting word(s) into the nameaddon field.

image This entry type, left undefined in the standard styles, is in biblatex-chicago intended for referring to photographs. Excluding the possible use of the entry-subtype field, which in an image entry would be ignored, this type is a clone of

artwork, so you should consult the latter's documentation above to see how to construct your .bib entry. (See *Manual* 12.33; bedford:photo.)

inbook These two standard biblatex types have very nearly identical formatting require-
incollection ments as far as the Chicago specification is concerned, but I have retained both of them for compatibility. Biblatex.pdf (§ 2.1.1) intends the first for "a part of a book which forms a self-contained unit with its own title," while the second would hold "a contribution to a collection which forms a self-contained unit with a distinct author and its own title." The title of both sorts will be placed within quotation marks, and in general you can use either type for most material falling into these categories. There is, however, an important differ-ence between them, as it is only in incollection entries that I implement the *Manual's* recommendations for space-saving abbreviations in notes and bibli-ography when you cite multiple pieces from the same collection. These ab-breviations are activated when you use the crossref or xref field in incollection entries, and not in inbook entries, mainly because the *Manual* (17.70) here spec-ifies a "multiauthor book." (For more on this mechanism see **crossref**, below, and note that it is also active in letter and inproceedings entries. There is, of course, nothing to prevent you from using the mechanism when referring to, e.g., chapters from a single-author book, but you'll have to use incollection in-stead of inbook.) If the part of a book to which you are referring has had a separate publishing history as a book in its own right, then you may wish to use the bookinbook type, instead, on which see above. (See *Manual* 17.68–72; inbook: ashbrook:brain, phibbs:diary, will:cohere; incollection: centinel:letters, contrib:contrib, sirosh:visualcortex; ellet:galena, keating:dearborn, and lippin-cott:chicago [and the collection entry prairie:state] demonstrate the use of the crossref field with its attendant abbreviations in notes and bibliography.)

NB: The *Manual* suggests that, when referring to a chapter, one use either a chapter number or the inclusive page numbers, not both. If, however, you wish to refer in a footnote to a specific page within the chapter, biblatex-chicago-notes will always print the optional, postnote argument of a \cite command — the page number, say — instead of any inclusive page numbers given in the .bib file incollection entry. This mechanism is quite general, that is, any specific page reference given in any sort of \cite command overrides the contents of a pages field in a .bib file entry.

inproceedings This entry type works pretty much as in standard biblatex. Indeed, the main differences between it and incollection are the lack of an edition field and the possibility that an organization may be cited alongside the publisher, even though the *Manual* doesn't specify its use (17.71). Please note, also, that the crossref and xref mechanism for shortening citations of multiple pieces from the same proceedings is operative here, just as it is in incollection entries. See **crossref**, below, for more details.

inreference This entry type is aliased to incollection in the standard styles, but the *Manual* has particular requirements, so if you are citing "[w]ell-known reference books, such as major dictionaries and encyclopedias," then this type should simplify the task of conforming to the specifications (17.238–239). The main thing to keep in mind is that I have designed this entry type for "alphabetically ar-ranged" works, which you shouldn't cite by page, but rather by the name(s) of the article(s). Because of the formatting required by the *Manual*, we need one of biblatex's list fields for this purpose, and in order to keep all this out of the way of the standard styles, I have chosen the lista field. You should present these article names just as they appear in the work, separated by the keyword "and" if there is more than one, and biblatex-chicago-notes will provide the appropriate prefatory string (s.v., plural s.vv.), and enclose each in its own set of quota-tion marks (ency:britannica). In a typical inreference entry, very few other fields are needed, as "the facts of publication are often omitted, but the edition (if not the first) must be specified." In practice, this means a title and possibly an edition field.

There are quite a few other peculiarities to explain here. First of all, you should present any well-known works *only* in notes, not in a bibliography, as your readers are assumed to know where to go for such a reference. You can use the `skipbib` option or the keywords mechanism I discuss below under **crossref** and **keywords**. For such works, and given how little information will be present even in a full note, you may wish to use `\fullcite` or `\footfullcite` in place of the short form, especially if, for example, you are citing different versions of an article appearing in different editions.

If the work is slightly less well known, it may be that full publication details are appropriate (times:guide), but this makes things more complicated. In previous releases of biblatex-chicago-notes, you would have had to format the postnote field of short notes appropriately, including the prefatory string and quotation marks I mentioned above. Now you can put an article name in the postnote field of inreference entries and have it formatted for you, and this holds for both long and short notes, which could allow you to refer separately to many different articles from the same reference work using only one .bib entry. (In a long note, any postnote field stops the printing of the contents of lista.) The only limitation on this system is that the postnote field, unlike lista, is not a list, and therefore for the formatting to work correctly you can only put one article name in it. Despite this limitation, I hope that the current system might simplify things for users who cite numerous works of reference.

If it seems appropriate to include such a work in the bibliography, be aware that the contents of the lista field will also be presented there, which may not be what you want. A separate reference entry might solve this problem, but you may also need a sortkey field to ensure proper alphabetization, as biblatex will attempt to use an editor or author name, if either is present. (Cf. mla:style, a reference entry that uses section numbers instead of alphabetized headings, and `useeditor=false` in the options field instead of a sortkey to ensure the correct alphabetization.)

Speaking of the author, this field holds the author of the specific entry (in lista), not the author of the title as a whole. This name will be printed in parentheses after the entry's name (grove:sibelius). If you wish to refer to a reference work by author or indeed by editor, having either appear at the head of the note (long or short) or bibliography entry, then you'll need to use a book entry instead (cf. schellinger:novel), where the lista mechanism will also work in the bibliography, but which in every other way will be treated as a normal book, often a good choice for unfamiliar or non-standard reference works.

Finally, all of these rules apply to online reference works, as well, for which you need to provide not only a url but also, always, a urldate, as these sources are in constant flux (wikiped:bibtex, grove:sibelius).

letter This is the entry type to use for citing letters, memoranda, or similar texts, but *only* when they appear in a published collection. (Unpublished material of this nature needs a misc entry, for which see below.) Depending on what sort of information you need to present in a citation, you may simply be able to get away with a standard book entry, which may then be cited by page number (see *Manual* 17.31, 17.42; meredith:letters, adorno:benj). If, however, for whatever reason, you need to give full details of a specific letter, then you'll need to use the letter entry type, which attempts to simplify for you the *Manual*'s rather complicated rules for formatting such references. (See 17.76–78; jackson:paulina:letter, white:ross:memo, white:russ [a completely fictitious entry to show the xref mechanism], white:total [a book entry, for the bibliography]).

To start, the name of the letter writer goes in the author field, while the title field contains both the name of the writer and that of the recipient, in the form `Author to Recipient`. The titleaddon field contains the type of correspondence involved. If it's a letter, this field may be left blank, but if it's a memorandum or report or the like, then this is the place to specify that fact. Also, because the

origdate field only accepts numbers, if you want to use the abbreviation "n.d." (or `\bibstring{nodate}`) for undated letters, then this is where you should put it. If you need to specify where a letter was written, then you can also use this field, and, if both are present, remember to separate the location from the type with a comma, like so: `memorandum, London`. Alternatively, you can put the place of writing into the origlocation field. Most importantly, the date of the letter itself goes in the origdate field (`year-month-day`), which now allows a full date specification, while the publishing date of the whole collection goes in the date field, instead of in the obsolete origyear. As in other entry types, then, the date field now has its ordinary meaning of "date of publication." (You may have noticed here that the presentation of the origdate in this sort of reference is different from the date format required elsewhere by the *Manual*. This appears to result from some recent changes to the specification, and it may be that we could get away with choosing one or the other format for all occurrences [6.46], but for the moment I hope this mixed solution will suffice.) Another difficulty arises when producing the short footnote form, which requires you to provide a shorttitle field of the form "to Recipient," the latter name as short as possible while avoiding ambiguity. The remaining fields are fairly self explanatory, but do remember that the title of the published collection belongs in booktitle rather than in title.

Finally, the *Manual* specifies that if you cite more than one letter from a given published collection, then the bibliography should contain only a reference to said collection, rather than to each individual letter, while the form of footnotes would remain the same. This should be possible using BibTeX's standard crossref field, with each letter entry pointing to a collection or book entry, for example. I shall discuss cross references at length later (**crossref** and **xref**, below), but I should mention here that letter is one of the entry types in which a crossref or an xref field automatically results in special shortened forms in notes and bibliography if more than one piece from a single collection is cited. (The other entry types are incollection and inproceedings; see 17.70 for the *Manual*'s specification.) This ordinarily won't be an issue for letter entries in the bibliography, as individual letters aren't included there, but it is operative in notes, where you can disable it simply by not using a crossref or an xref field. In the crossref docs, below, I recommend a way of keeping the individual letters from turning up in the bibliography, involving the use of the keywords field.

manual This is the second of two traditional BibTeX entry types that the *Manual* suggests formatting as books, the other being booklet. As with this latter, I have retained it in biblatex-chicago-notes for backward compatibility, its main peculiarity being that, in the absence of a named author, the organization producing the manual will be printed both as author and as publisher. In such a case, you'll need a sortkey field to aid biblatex's alphabetization routines, but you no longer need to provide a shortauthor field, as the style will automatically use organization in the absence of anything else. Of course, if you were to use a book entry for such a reference, then you would need to define both author and publisher using the name you here might have put in organization. (See 17:47; chicago:manual:15, dyna:browser, natrecoff:camera.)

misc As its name suggests, the misc entry type was designed as a hold-all for citations that didn't quite fit into other categories. In biblatex-chicago-notes, I have somewhat extended its applicability, while retaining its traditional use. Put simply, with no entrysubtype field, a misc entry will retain backward compatibility with the standard styles, so the usual howpublished, version, and type fields are all available for specifying an otherwise unclassifiable text, and the title will be italicized. (The *Manual*, you may wish to note, doesn't give specific instructions on how such citations should be formatted, so when using the Chicago style I would recommend you have recourse to this traditional entry type as sparingly as possible.)

If you do provide an entrysubtype field, the misc type provides a means for citing unpublished letters, memoranda, private contracts, wills, interviews, and the like, making it something of an unpublished analogue to the letter, article, and review entry types (which see). Typically, such an entry will cite part of an archive, and equally typically the text cited won't have a specific title, but only a generic one, whereas an unpublished entry will ordinarily have a specific author and title, and won't come from a named archive. The misc type with an entrysubtype defined is the least formatted of all those specified by the *Manual*, so titles are in plain text, and any location details take no parentheses in full footnotes. (It is quite possible, though somewhat unusual, for archival material to have a specific title, rather than a generic one. In these cases, you will need to enclose the title inside a \mkbibquote command manually. Cf. shapey:partita.)

If you are wondering what to put in entrysubtype, the answer is, currently, anything at all. You no longer need to put the exact string letter there in order to move the date into closer proximity with the title. Indeed, recent reconsideration of the *Manual* has suggested that the distinction to be drawn in this class of material hasn't to do with *where* the date is presented but, rather, with *how* it is presented. As I now understand the specification, it draws a distinction between archival material that is "letter-like" (letters, memoranda, reports, telegrams) and that which isn't (interviews, wills, contracts, or even personal communications you've received and which you wish to cite). This may not always be the easiest distinction to draw, and in previous releases of biblatex-chicago I have been ignoring it, but once you've decided to classify it one way or the other you put the date in the origdate field for letters, etc., and into the date field for the others.

In effect, whether it's a letter entry or a "letter-like" misc entry (with entrysubtype), it is by using the origdate field that you identify when it was written, and the origlocation, if needed, identifies where it was written. Other sorts of misc entry (with entrysubtype) use the date field (but still the origlocation). This maintains consistency of usage across entry types and also, I hope, improves compliance when using the misc type for citing archival material. Remember, however, that without an entrysubtype the entry will be treated as traditional misc, and the title italicized. In addition, defining entrysubtype activates the automatic capitalization mechanism in the title field of misc entries, on which see **\autocap** below. (See 17.205-206, 17.220, 17.222-232; creel:house, dinkel:agassiz, spock:interview.)

As in letter entries, the titles of unpublished letters are of the form Author to Recipient, and further information can be given in the titleaddon field, including the abbreviation "n.d." (or \bibstring{nodate}) for undated examples. The note, organization, institution, and location fields (in ascending order of generality) allow the specification of which manuscript collection now holds the letter, though the *Manual* specifies (17.228) that well-known depositories don't usually need a city, state or country specified. (The traditional misc fields are all still available, also.) Both the long and short note forms can use the same title, but in both cases you may need to use the \headlesscite command to avoid the awkward repetition of the author's name, though that name will always appear in the bibliography (creel:house). If you want to include the date of a letter in a short note, I have provided the \letterdatelong command for inclusion in the postnote field of the citation command. (The standard biblatex command \printdate will work if you need to do the same for interviews.)

As with letter entries, the *Manual* (17.223) suggests that bibliography entries contain only the name of the manuscript collection, unless only one item from that collection is cited. The crossref field can be used, as well as the keywords mechanism (or skipbib option) for preventing the individual items from turning up in the bibliography. Obviously, this is a matter for your discretion, and if you're using only short notes (see the short option, section 4.4.3 below), you may feel the need to include more information in the note if the bibliography doesn't contain a full reference to an individual item.

Finally, if the misc entry isn't a letter, remember that, as in article and review entries, words like `interview` or `memorandum` needn't be capitalized unless they follow a period — the automatic capitalization routines (with the title field starting with a lowercase letter [see dinkel:agassiz, spock:interview, and **\autocap**]) will ensure correctness. In all this class of archived material, the *Manual* (17.222) quite specifically requires more consistency within your own work than conformity to some external standard, so it is the former which you should pursue. I hope that biblatex-chicago-notes proves helpful in this regard.

music   This is one of three new audiovisual entry types, and is intended primarily to aid in the presentation of musical recordings that do not have a video component, though it can also include audio books (auden:reading). A DVD or VHS of an opera or other performance, by contrast, should use the **video** type instead (handel:messiah). Because biblatex — and BibTeX before it — were designed primarily for citing book-like objects, some choices needed to be made in assigning the various roles found on the back of a CD to the fields in a typical .bib entry. I have also implemented several new bibstrings to help in identifying these roles within entries. If you can think of a simpler way to distribute the roles, please let me know, so that I can consider making changes before anyone gets used to the current equivalences.

These equivalences, in summary form, are:

author = composer, songwriter, or performer(s), depending on whom you wish to emphasize by placing them at the head of the entry.

editor, editora, editorb = conductor, director or performer(s). These will ordinarily follow the title of the work, though the usual `useauthor` and `useeditor` options can alter the presentation within an entry. Because these are non-standard roles, you will need to identify them using the following:

editortype, editoratype, editorbtype: The most common roles, all associated with specific bibstrings (or their absence), will be `conductor`, `director`, `producer`, and, oddly, `none`. The last is particularly useful when identifying the group performing a piece, as it usually doesn't need further specifying and this role prevents biblatex from falling back on the default `editor` bibstring.

title, booktitle, maintitle: As with the other audiovisual types, music serves as an analogue both to books and to collections, so the title will either be, e.g., the album title or a song title, in which latter case the album title would go into booktitle. The maintitle might be necessary for something like a box set of *Complete Symphonies*.

series, number: These two are closely associated, and are intended for presenting the catalog information provided by the music publisher, especially in the case when a publisher oversees more than one label. In nytrumpet:art:15, for example, the series field holds the label (`Vox/Turnabout`) and the number field the catalog number (`PVT 7183`). You can certainly put all of this information into one of the above fields, but separating it may help make the .bib entry more readable.

howpublished/pubstate, date, publisher: The *Manual* (17.268) follows the rather specialized requirements for presenting publishing information for musical recordings. The normal symbol for musical copyright is ℗ (Unicode point u+2117, SOUND RECORDING COPYRIGHT), but other copyrights © are often also asserted. The howpublished field is the place for these symbols, and it may also have to hold a year designation if the ℗ and the © apply to different years, as sometimes happens. (The pubstate field in this entry type is a synonym for howpublished. Please use only one of them per entry, and note that the usual mechanism for automatically

printing `\bibstring{reprint}` is turned off in music entries.) The date field holds the year either of all the symbols or of whichever symbol appears last in howpublished, and the publisher field is self-explanatory. (See nytrumpet:art:15.)

type: As in all the audiovisual entry types, the type field holds the medium of the recording, e.g., vinyl, 33 rpm, 8-track tape, cassette, compact disc, mp3, ogg vorbis.

I should also note here that I have implemented the standard biblatex eventdate field, in case you need it to identify a particular recording session or concert. It will be printed just after the title. The entries in notes-test.bib should at least give you a good idea of how this all works, and that file also contains an example of an audio book presented in a music entry. If you browse the examples in the *Manual* you will see some variation from the formatting choices I have made for biblatex-chicago, but it wasn't always clear to me that these variations were rules as opposed to suggestions, so I've ignored some of them in the code. Arguments as to why I'm wrong will, of course, be entertained. (Cf. 17.268; auden:reading, beethoven:sonata29, bernstein:shostakovich, nytrumpet:art:15.)

online The *Manual*'s instructions (17.142–147, 17.198, 17.234–237) for citing online materials are slightly different from those suggested by standard biblatex. Indeed, this is a case where complete backward compatibility with other biblatex styles may be impossible, because as a general rule the *Manual* considers relevant not only where a source is found, but also the nature of that source, e.g., if it's an online edition of a book (james:ambassadors), then it calls for a book entry. Even if you cite an "intrinsically online" source, if that source is structured more or less like a conventional printed periodical, then you'll probably want to use article or review instead of online (stenger:privacy, which cites *CNN.com — Yahoo! News* is another example that would be treated in such a way). If the "standard facts of publication" are missing, then the online type is usually the best choice (evanston:library, powell:email). Some online materials will, no doubt, make it difficult to choose an entry type, but so long as all locating information is present, then perhaps that is enough to fulfill the specification, or at least so I'd like to hope.

Constructing an online .bib file entry is much the same as in biblatex. The title field would contain the title of the page, the organization field could hold the title or owner of the whole site. If there is no specific title for a page, but only a generic one (powell:email), then such a title should go in titleaddon, not forgetting to begin that field with a lowercase letter so that capitalization will work out correctly.

patent The *Manual* is very brief on this subject (17.219), but very clear about which information it wants you to present, so such entries may not work well with other biblatex styles. The important date, as far as Chicago is concerned, is the filing date. If a patent has been filed but not yet granted, then you can place the filing date in either the date field or the origdate field, and biblatex-chicago-notes will automatically prepend the bibstring `patentfiled` to it. If the patent has been granted, then you put the filing date in the origdate field, and you put the date it was issued in the date field, to which the bibstring `patentissued` will automatically be prepended. (In other words, you no longer need to use a hand-formatted addendum field, though you can place additional information in that field if desired, and it will be printed in close association with the dates.) The patent number goes in the number field, and you should use the standard biblatex bibstrings in the type field. Though it isn't mentioned by the *Manual*, biblatex-chicago-notes will print the holder after the author, if you provide one. See petroff:impurity.

periodical This is the standard biblatex entry type for presenting an entire issue of a periodical, rather than one article within it. It has the same function in biblatex-chicago-notes, and in the main uses the same fields, though in keeping with the

system established in the article entry type (which see) you'll need to provide entrysubtype `magazine` if the periodical you are citing is a "newspaper" or "magazine" instead of a "journal." Also, remember that the note field is the place for identifying strings like "special issue," with its initial lowercase letter to activate the automatic capitalization routines. (See *Manual* 17.170; good:wholeissue.)

reference This entry type is aliased to collection by the standard biblatex styles, but I intend it to be used in cases where you need to cite a reference work but not an alphabetized entry or entries in that work. This could be because it doesn't contain such entries, or perhaps because you intend the citation to appear in a bibliography rather than in notes. Indeed, the only differences between it and inreference are the lack of a lista field to present an alphabetized entry, and the fact that any postnote field will be printed verbatim, rather than formatted as an alphabetized entry. (See mla:style for an example of a reference work that uses numbered sections rather than alphabetized entries, and that appears in the bibliography as well.)

report This entry type is a biblatex generalization of the traditional BibTeX type techreport. Instructions for such entries are rather thin on the ground in the *Manual* (17.241), so I have followed the generic advice about formatting it like a book, and hope that the results conform to the specification. Its main peculiarities are the institution field in place of a publisher, the type field for identifying the kind of report in question, and the isrn field containing the International Standard Technical Report Number of a technical report. As in standard biblatex, if you use a techreport entry, then the type field automatically defaults to `\bibstring{techreport}`. As with booklet and manual, you can also use a book entry, putting the report type in note and the institution in publisher. (See herwign:office.)

review The review entry type was added to biblatex 0.7, and it certainly eases the task of coping with the *Manual*'s complicated requirements for citing periodicals of all sorts, though it doesn't, I admit, eliminate all difficulties. As its name suggests, this entry type was designed for reviews published in periodicals, and if you've already read the article instructions above — if you haven't, I recommend doing so now — you'll know that review serves as well for citing other sorts of material with generic titles, like letters to the editor, obituaries, interviews, and the like. The primary rule is that any piece that has only a generic title, like "review of . . . ," "interview with . . . ," or "obituary of . . . ," calls for the review type. Any piece that also has a specific title, e.g., "'Lost in BibTeX,' an interview with . . . ," requires an article entry. (This assumes the text is found in a periodical of some sort. Were it found in a book, then the incollection type would serve your needs, and you could use title and titleaddon there. While we're on the topic of exceptions, the *Manual* includes an example — 17.207 — where the "Interview" part of the title is considered a subtitle rather than a titleaddon, said part therefore being included inside the quotation marks and capitalized accordingly. Not having the journal in front of me I'm not sure what prompted that decision, but biblatex-chicago would obviously have no difficulty coping with such a situation.)

Once you've decided to use review, then you need to determine which sort of periodical you are citing, the rules for which are the same as for an article entry. If it is a "magazine" or a "newspaper", then you need an entrysubtype `magazine`. The generic title goes in title and the other fields work just as as they do in an article entry with the same entrysubtype, including the substitution of the journaltitle for the author if the latter is missing. (See 17.185, 17.188–194, 17.199–203, 17.207; barcott:review, bundy:macneil, Clemens:letter, gourmet:052006, kozinn:review, nyt:obittrevor, nyt:trevorobit, unsigned:ranke:15, wallraff:word.) If, on the other hand, the piece comes from a "journal," then you don't need an entrysubtype. The generic title goes in title, and the remaining fields work just as they do in a plain article entry. (See 17.201; ratliff:review.)

The onerous details are the same as I described them in the **article** section above, but I'll repeat some of them briefly here. If anything in the title needs formatting, you need to provide those instructions yourself, as the default is completely plain. In the short note form you no longer need to provide a formatted shortauthor field for when a journaltitle replaces an absent author, as the package automatically prints the former there in the absence of anything else (gourmet:052006, nyt:trevorobit). If you wish to keep the title at the head of an entry, then you'll need to define author somehow and place `useauthor=false` in the options field (as in nyt:obittrevor, by contrast with nyt:trevorobit. Please note that the `\isdot` macro alone in the author field no longer works in biblatex 1.6 and later, so you may need to check your .bib files when you upgrade.) As in misc entries with an entrysubtype, words like "interview," "review," and "letter" only need capitalization after a full stop, i.e., ordinarily in a bibliography and not a note, so biblatex-chicago-notes automatically deals with this problem itself if you start the title field with a lowercase letter. The file notes-test.bib and the documentation of `\autocap` will provide guidance here.

suppbook   This is the entry type to use if the main focus of a reference is supplemental material in a book or in a collection, e.g., an introduction, afterword, or forward, either by the same or a different author. In previous releases of biblatex-chicago these three just-mentioned types of material, and only these three types, could be referenced using the introduction, afterword, or foreword fields, a system that required you simply to define one of them in any way and leave the others undefined. The macros don't use the text provided by such an entry, they merely check to see if one of them is defined, in order to decide which sort of pre- or post-matter is at stake, and to print the appropriate string before the title in long notes, short notes, list of shorthands, and bibliography. I have retained this mechanism both for backward compatibility and because it works without modification across multiple languages, but have also added functionality which allows you to cite any sort of supplemental material whatever, using the type field. Under this system, simply put the nature of the material, including the relevant preposition, in that field, beginning with a lowercase letter so biblatex can decide whether it needs capitalization depending on the context. Examples might be "`preface to`" or "`colophon of`." (Please note, however, that unless you use a `\bibstring` command in the type field, the resultant entry will not be portable across languages.)

The other rules for constructing your .bib entry remain the same. The author field refers to the author of the introduction or afterword, while bookauthor refers to the author of the main text of the work, if the two differ. If the focus of the reference is the main text of the book, but you want to mention the name of the writer of an introduction or afterword for bibliographical completeness, then the normal biblatex rules apply, and you can just put their name in the appropriate field of a book entry, that is, in the foreword, afterword, or introduction field. (See *Manual* 17.74–75; polakow:afterw, prose:intro).

suppcollection   This fulfills a function analogous to suppbook. Indeed, I believe the **suppbook** type can serve to present supplemental material in both types of work, so this entry type is an alias to suppbook, which see.

suppperiodical   This type, new to biblatex 0.8, is intended to allow reference to generically-titled works in periodicals, such as regular columns or letters to the editor. Previous releases of biblatex-chicago-notes provided the review type for this purpose, and now you can use either of these, as I've added suppperiodical as an alias of review. Please see above under **review** for the full instructions on how to construct a .bib entry for such a reference.

unpublished   The unpublished entry type works largely as it does in standard biblatex, though it's worth remembering that you should use a lowercase letter at the start of your note field (or perhaps an `\autocap` command in the somewhat contra-

dictory howpublished, if you have one) for material that wouldn't ordinarily be capitalized except at the beginning of a sentence (nass:address).

video This is the last of the new audiovisual entry types, and as its name suggests it is intended for citing visual media, be it films of any sort or TV shows, broadcast, on the Net, on VHS, DVD, or Blu-ray. As with the music type discussed above, certain choices had to be made when associating the production roles found, e.g., on a DVD, to those bookish ones provided by biblatex. Here are the main correspondences:

author: This will not infrequently be left undefined, as the director of a film should be identified as such and therefore placed in the editor field with the appropriate editortype (see below). You will need it, however, to identify the composer of, e.g., an oratorio on VHS (handel:messiah), or perhaps the provider of commentaries or other extras on a film DVD (cleese:holygrail).

editor, editora, editorb = director or producer, or possibly the performer or conductor in recorded musical performances. These will ordinarily follow the title of the work, though the usual useauthor and useeditor options can alter the presentation within an entry. Because these are non-standard roles, you will need to identify them using the following:

editortype, editoratype, editorbtype: The most common roles, all associated with specific bibstrings (or their absence), will likely be director, producer, and, oddly, none. The last is particularly useful if you want to identify performers, as they usually don't need further specifying and this role prevents biblatex from falling back on the default editor bibstring.

title, titleaddon, booktitle, maintitle: As with the other audiovisual types, video serves as an analogue both to books and to collections, so the title may be of a whole film DVD or of a TV series, or it may identify one episode in a series or one scene in a film. In the latter cases, the title of the whole would go in booktitle. The titleaddon field may be useful for specifying the season and/or episode number of a TV series, or for any other information that needs to come between the title and the booktitle (cleese:holygrail, episode:tv, handel:messiah). As in the music type, maintitle may be necessary for a boxed set or something similar.

date, origdate: The publication details of this sort of material are usually straightforward, at least compared with the music type, but there will be occasions when you need two dates. When citing an episode of a long-running TV series you may need both a date for the episode and a date range for the whole run, and when citing a film on DVD you may want to present both the original release date and the date of release on DVD. In both cases, the origdate field holds the year of the original showing or transmission, while the date field holds either the years for an entire run of a TV show or the year of publication of the DVD (or other medium). Cf. episode:tv, hitchcock:nbynw.

type: As in all the audiovisual entry types, the type field holds the medium of the title, e.g., 8 mm, VHS, DVD, Blu-ray, MPEG.

As with the music type, entries in notes-test.bib should at least give you a good idea of how all this works. (Cf. 17.270, 273; cleese:holygrail, episode:tv, handel:messiah, hitchcock:nbynw, loc:city.)

4.2 Entry Fields

The following discussion presents, in alphabetical order, a complete list of the entry fields you will need to use biblatex-chicago-notes. As in section 4.1, I shall include references to the numbered paragraphs of the *Chicago Manual of Style*,

and also to the entries in notes-test.bib. Many fields are most easily understood with reference to other, related fields. In such cases, cross references should allow you to find the information you need.

addendum As in standard biblatex, this field allows you to add miscellaneous information to the end of an entry, after publication data but before any url or doi field. In the patent entry type (which see), it will be printed in close association with the filing and issue dates. In any entry type, if your data begins with a word that would ordinarily only be capitalized at the beginning of a sentence, then simply ensure that that word is in lowercase, and the style will take care of the rest. Cf. note. (See *Manual* 17.145, 17.123; davenport:attention, natrecoff:camera.)

afterword In most circumstances, this field will function as it does in standard biblatex, i.e., you should include here the author(s) of an afterword to a given work. The *Manual* suggests that, as a general rule, the afterword would need to be of significant importance in its own right to require mentioning in the reference apparatus, but this is clearly a matter for the user's judgment. As in biblatex, if the name given here exactly matches that of an editor and/or a translator, then biblatex-chicago-notes will concatenate these fields in the formatted references.

As noted above, however, this field has a special meaning in the suppbook entry type, used to make an afterword, foreword, or introduction the main focus of a citation. If it's an afterword at issue, simply define afterword any way you please, leave foreword and introduction undefined, and biblatex-chicago-notes will do the rest. Cf. foreword and introduction. (See *Manual* 17.46, 17.74; polakow:afterw.)

annotation At the request of Emil Salim, biblatex-chicago-notes has, as of version 0.9, added a package option (see annotation below, section 4.4.3) to allow you to produce annotated bibliographies. The formatting of such a bibliography is currently fairly basic, though it conforms with the *Manual's* minimal guidelines (16.77). The default in chicago-notes.cbx is to define \DeclareFieldFormat{annotation} using \par\nobreak \vskip \bibitemsep, though you can alter it by re-declaring the format in your preamble. The page-breaking algorithms don't always give perfect results here, but the default formatting looks, to my eyes, fairly decent. In addition to tweaking the field formatting you can also insert \par (or even \vadjust{\eject}) commands into the text of your annotations to improve the appearance. Please consider the annotation option a work in progress, but it is usable now. (N.B.: The BibTeX field annote serves as an alias for this.)

annotator I have implemented this biblatex field pretty much as that package's standard styles do, even though the *Manual* doesn't actually mention it. It may be useful for some purposes. Cf. commentator.

author For the most part, I have implemented this field in a completely standard BibTeX fashion. Remember that corporate or organizational authors need to have an extra set of curly braces around them (e.g., {{Associated Press}}) to prevent BibTeX from treating one part of the name as a surname (17.47, 17.197; assocpress:gun, chicago:manual:15). If there is no author, then biblatex-chicago-notes will look, in sequence, for an editor, translator, or compiler (actually namec, currently) and use that name (or those names) instead, followed by the appropriate identifying string (esp. 17.41, also 17.28–29, 17.88, 17.95, 17.172; boxer:china, brown:bremer, harley:cartography, schellinger:novel, sechzer:women, silver:gawain, soltes:georgia). Please note that when a namec appears at the head of an entry, you'll need to assist biblatex's sorting algorithms by providing a sortkey field to ensure correct alphabetization in the bibliography. Also, a shortauthor entry is necessary to provide a name at the head of the short note form.

In the rare cases when this substitution mechanism isn't appropriate, you have two options: either you can (chaucer:liferecords) put all the information into

a note field rather than individual fields, or you can use the biblatex options useauthor=false, useeditor=false, usetranslator=false, and usecompiler=false in the options field (chaucer:alt). If you look at the chaucer:alt entry in notes-test.bib, you'll notice a peculiarity of this system of toggles. In order to ensure that the title of the book appears at the head of the entry, you need to use *all four* of the toggles, even though the entry contains no translator. Internally, biblatex-chicago is either searching for an author-substitute, or it is skipping over elements of the ordered, unidirectional chain author -> editor -> translator -> compiler -> title. If you don't include usetranslator=false in the options field, then the package begins its search at translator and continues on to namec, even though you have usecompiler=false in options. The result will be that the compilers' names will appear at the head of the entry. If you want to skip over parts of the chain, you must turn off *all* of the parts up to the one you wish printed.

This system of toggles, then, can turn off biblatex-chicago-notes's mechanism for finding a name to place at the head of an entry, but it also very usefully adds the possibility of citing a work with an author by its editor, compiler or translator instead (17.45; eliot:pound), something that wasn't possible before. For full details of how this works, see the editortype documentation below. (Of course, in collection and proceedings entry types, an author isn't expected, so there the editor is required, as in standard biblatex. Also, in article or review entries with entrysubtype magazine, the absence of an author triggers the use of the journaltitle in its stead. See those entry types for further details.)

NB: The *Manual* provides specific instructions for formatting the names of both anonymous and pseudonymous authors (17.32–39). In the former case, if no author is known or guessed at, then it may simply be omitted (virginia:plantation). The use of "Anonymous" as the name is "generally to be avoided," but may in some cases be useful "in a bibliography in which several anonymous works need to be grouped." If, on the other hand, "the authorship is known or guessed at but was omitted on the title page," then you need to use the authortype field to let biblatex-chicago-notes know this fact. If the author is known (horsley:prosodies), then put anon in the authortype field, if guessed at (cook:sotweed) put anon? there. (In both cases, biblatex-chicago-notes tests for these *exact* strings, so check your typing if it doesn't work.) This will have the effect of enclosing the name in square brackets, with or without the question mark indicating doubt. As long as you have the right string in the authortype field, biblatex-chicago-notes will also do the right thing automatically in the short note form.

The nameaddon field furnishes the means to cope with the case of pseudonymous authorship. If the author's real name isn't known, simply put pseud. (or \bibstring{pseudonym}) in that field (centinel:letters). If you wish to give a pseudonymous author's real name, simply include it there, formatted as you wish it to appear, as the contents of this field won't be manipulated as a name by biblatex (lecarre:quest). If you have given the author's real name in the author field, then the pseudonym goes in nameaddon, in the form Firstname Lastname, pseud. (creasey:ashe:blast, creasey:morton:hide, creasey:york:death). This latter method will allow you to keep all references to one author's work under different pseudonyms grouped together in the bibliography, as recommended by the *Manual*.

authortype   In biblatex-chicago, this field serves a function very much in keeping with the spirit of standard biblatex, if not with its letter. Instead of allowing you to change the string used to identify an author, the field allows you to indicate when an author is anonymous, that is, when his or her name doesn't appear on the title page of the work you are citing. As I've just detailed under author, the *Manual* generally discourages the use of "Anonymous" as an author, preferring that you simply omit it. If, however, the name of the author is known or guessed at, then you're supposed to enclose that name within square brackets, which is exactly what biblatex-chicago does for you when you put either anon (author

known) or anon? (author guessed at) in the authortype field. (Putting the square brackets in yourself doesn't work right, hence this mechanism.) The macros test for these *exact* strings, so check your typing if you don't see the brackets. Assuming the strings are correct, biblatex-chicago-notes will also automatically do the right thing in the short note form. Cf. author. (See 17.33–34; cook:sotweed, horsley:prosodies.)

bookauthor For the most part, as in biblatex, a bookauthor is the author of a booktitle, so that, for example, if one chapter in a book has different authorship from the book as a whole, you can include that fact in a reference (17.75; will:cohere). Keep in mind, however, that the entry type for introductions, forewords and afterwords (suppbook) uses bookauthor as the author of title (polakow:afterw, prose:intro).

bookpagination This, a standard biblatex field, allows you automatically to prefix the appropriate string to information you provide in a pages field. If you leave it blank, the default is to print no identifying string (the equivalent of setting it to none), as this is the practice the *Manual* recommends for nearly all page numbers. Even if the numbers you cite aren't pages, but it is otherwise clear from the context what they represent, you can still leave this blank. If, however, you specifically need to identify what sort of unit the pages field represents, then you can either hand-format that field yourself, or use one of the provided bibstrings in the bookpagination field. These bibstrings currently are column, line, paragraph, page, section, and verse, all of which are used by biblatex's standard styles.

There are two points that may need explaining here. First, all the bibstrings I have just listed follow the Chicago specification, which may be confusing if they don't produce the strings you expect. Second, remember that bookpagination applies only to the pages field — if you need to format a citation's postnote field, then you must use pagination, which see (15.45–46, 17.128–138).

booksubtitle The subtitle for a booktitle. See the next entry for further information.

booktitle In the bookinbook, inbook, incollection, inproceedings, and letter entry types, the booktitle field holds the title of the larger volume in which the title itself is contained as one part. It is important not to confuse this with the maintitle, which holds the more general title of multiple volumes, e.g., *Collected Works*. It is perfectly possible for one .bib file entry to contain all three sorts of title (euripides:orestes, plato:republic:gr). You may also find a booktitle in other sorts of entries (e.g., book or collection), but there it will almost invariably be providing information for the BibTeX cross-referencing apparatus (prairie:state), which I discuss below (**crossref**).

booktitleaddon An annex to the booktitle. It will be printed in the main text font, without quotation marks. If your data begins with a word that would ordinarily only be capitalized at the beginning of a sentence, then simply ensure that that word is in lowercase, and biblatex-chicago-notes will automatically do the right thing.

chapter This field holds the chapter number, mainly useful only in an inbook or an incollection entry where you wish to cite a specific chapter of a book (ashbrook:brain).

commentator I have implemented this biblatex field pretty much as that package's standard styles do, even though the *Manual* doesn't actually mention it. It may be useful for some purposes. Cf. annotator.

crossref Biblatex uses the standard BibTeX cross-referencing mechanism, and has also introduced a modified one of its own (xref). The crossref field works exactly the same as it always has, while xref attempts to remedy some of the deficiencies of the usual mechanism by ensuring that child entries will inherit no data at all from their parents. Having said all that, a few further instructions may be in order for users of both biblatex and biblatex-chicago. First, remember that fields

in a collection entry, for example, differ from those in an incollection entry. In order for the latter to inherit the booktitle field from the former, the former needs to have such a field defined, even though a collection entry has no use itself for such an entry (see ellet:galena, keating:dearborn, lippincott:chicago, and prairie:state). Note also that an entry with a crossref field will mechanically try to inherit all applicable fields from the entry it cross-references. In the case of ellet:galena et al., you can see that this includes the subtitle field found in prairie:state, which would then, quite incorrectly, be added to the title of ellet:galena. In cases like these, you could just make sure that prairie:state didn't contain such a field, by placing the entire title + subtitle in the title field, separated by a colon. You'd certainly need to provide a shorttitle field for short footnotes, if you chose this solution. Alternatively, as you can see in ellet:galena, you can just define an empty subtitle field to prevent it inheriting the unwanted subtitle from prairie:state.

Turning now more narrowly to biblatex-chicago-notes, the *Manual* (17.70) specifies that if you cite several contributions to the same collection, all (including the collection itself) may be listed separately in the bibliography, which the package does automatically, using the default inclusion threshold of 2 in the case both of crossref'ed and xref'ed entries. (The familiar `\nocite` command may also help in some circumstances.) In footnotes the specification suggests that, after a citation of any one contribution to the collection, all subsequent contributions may, even in the first, long footnote, be cited using a slightly shortened form, thus "avoiding clutter." In the bibliography the abbreviated form is appropriate for all the child entries. The current version of biblatex-chicago-notes implements these instructions, but only if you use a crossref or an xref field, and only in incollection, inproceedings, or letter entries (on the last named, see just below). If you look at ellet:galena, keating:dearborn, lippincott:chicago, and prairie:state you'll see this mechanism in action in both notes and bibliography. If you wish to disable this, then simply don't use a crossref or xref field in your entries.

There is a subtlety involved in this mechanism that I should address here. Andrew Goldstone has pointed out to me some inaccuracies in the package's treatment of these abbreviated citations, both in notes and bibliography. Most of the changes I've made won't affect users in any way, only the actual printed output, but if you refer separately to chapters in a single-author book, then the shortened part of the reference, to the whole book, won't repeat the author's name before the title of the whole. If, however, you refer separately to parts of a collection or proceedings, even when the editor of the collection is the same as the author of an essay in the collection, you will see the name repeated before the abbreviated part referencing the whole parent volume. Because the code tests for entry type, if you don't use collection or proceedings for the whole volume, you'll not get the repeated name, so there may be corner cases where careful choice of the parent entry type gets you what you want.

A published collection of letters requires a somewhat different treatment (17.78). If you cite more than one letter from the same collection, then the *Manual* specifies that only the collection itself should appear in the bibliography. In footnotes, you can use the letter entry type, documented above, for each individual letter, while the collection as a whole may well require a book entry. I have, after some consideration, implemented the system of shortened references in letter entries, even though the *Manual* doesn't explicitly require it. As with incollection and inproceedings, mere use of a crossref or xref field will activate this mechanism, while avoidance of said fields will disable it. (See white:ross:memo, white:russ, and white:total, for examples of the xref field in action in this way, and please note that the second of these entries is entirely fictitious, provided merely for the sake of example.) How then to keep the individual letters from appearing in the bibliography? The simplest mechanism is one provided by biblatex, which involves the keywords field. Choose a keyword for any entry you wish excluded from the bibliography — I've chosen `original`, for reasons that will become clearer later — then in the optional ar-

gument to the \printbibliography command in your document include, e.g., notkeyword=original. (Cf. **keywords** and **userf**.)

If you look closely at the .bib entries for white:ross:memo and white:russ, you'll see that, despite using xref instead of crossref, the notes referring to them inherit data from the parent (white:total). The citation mechanism is making a separate call to the parent's .bib entry, formatting the information there to fill out the bare data provided by the child, but this only happens in letter, incollection, and inproceedings entries. It is perfectly possible that other sorts of entries may make use of crossref or xref fields — inbook and bookinbook come to mind — but such entries will not result in the activation of shortened references in notes and bibliography, nor, when using xref, in the inheritance I have just pointed out. This is how I interpret the specification, though I'm open to persuasion on this score.

I should also take this opportunity to mention that you need to be careful when using the shorthand field in conjunction with the crossref or xref fields, bearing in mind the complicated questions of inheritance posed by all such cross-references, most especially in letter, incollection, and inproceedings entries. A shorthand field in a parent entry is, at least in the current state of biblatex-chicago-notes, a bad idea.

date This field may be used to specify an item's complete date of publication, in ISO8601 format, i.e., yyyy-mm-dd. It may also be used to specify a date range, according to Lehman's instructions in § 2.3.8 of biblatex.pdf. Please be aware, however, that Biber is somewhat more exacting when parsing the date field than BibTeX, so a field looking like 1968/75 will simply be ignored — you need 1968/1975 instead. If you want to present a more compressed year range, or more generally if only part of a date is required, then the month and year fields may be more convenient. The latter may be particularly useful in some entries because it can hold more than just numerical data, in contrast to date itself. Cf. the misc entry type in section 4.1 above for how to use this field to distinguish between two classes of archival material. See also origdate and urldate.

(Users of the Chicago author-date style who wish to minimize the labor needed to convert a .bib database for the notes & bibliography style should be aware that, in this release, the latter style includes compatibility code for the cmsdate (silently ignored) and switchdates options, along with the mechanism for reversing date and origdate. This means that you can, in theory, leave all of this alone in your .bib file when making the conversion, though I'm retaining the right to revoke this if the code in question demonstrably interferes with the functioning of the notes & bibliography style.)

day This field, as of biblatex 0.9, is obsolete, and will be ignored if you use it in your .bib files. Use date instead.

doi Standard biblatex field. The Digital Object Identifier of the work, which the *Manual* suggests you can use "in place of page numbers or other locators" (17.181; friedman:learning). Cf. url.

edition Standard biblatex field. If you enter a plain cardinal number, biblatex will convert it to an ordinal (chicago:manual:15), followed by the appropriate string. Any other sort of edition information will be printed as is, though if your data begins with a word (or abbreviation) that would ordinarily only be capitalized at the beginning of a sentence, then simply ensure that that word (or abbreviation) is in lowercase, and biblatex-chicago-notes will automatically do the right thing (babb:peru, times:guide). In most situations, the *Manual* generally recommends the use of abbreviations in both bibliography and notes, but there is room for the user's discretion in specific citations (emerson:nature).

In a previous release of biblatex-chicago-notes, I introduced the userd field to hold this non-numeric information, as biblatex only accepted an integer in the

edition field, but this changed in version 0.8. The userd field is now obsolete, and will be silently ignored.

editor As far as possible, I have implemented this field as biblatex's standard styles do, but the requirements specified by the *Manual* present certain complications that need explaining. Lehman points out in his documentation that the editor field will be associated with a title, a booktitle, or a maintitle, depending on the sort of entry. More specifically, biblatex-chicago associates the editor with the most comprehensive of those titles, that is, maintitle if there is one, otherwise booktitle, otherwise title, if the other two are lacking. In a large number of cases, this is exactly the correct behavior (adorno:benj, centinel:letters, plato:republic:gr, among others). Predictably, however, there are numerous cases that require, for example, an additional editor for one part of a collection or for one volume of a multi-volume work. For these cases I have provided the namea field. You should format names for this field as you would for author or editor, and these names will always be associated with the title (donne:var).

As you will see below, I have also provided a nameb field, which holds the translator of a given title (euripides:orestes). If namea and nameb are the same, biblatex-chicago will concatenate them, just as biblatex already does for editor, translator, and namec (i.e., the compiler). Furthermore, it is conceivable that a given entry will need separate editors for each of the three sorts of title. For this, and for various other tricky situations, there is the \partedit macro (and its siblings), designed to be used in a note field or in one of the titleaddon fields (chaucer:liferecords). (Because the strings identifying an editor differ in notes and bibliography, one can't simply write them out in such a field, hence the need for a macro, which I discuss further in the commands section below [4.3.1].) Cf. namea, nameb, namec, and translator.

editora
editorb
editorc The newer releases of biblatex provide these fields as a means to specify additional contributors to texts in a number of editorial roles. In the Chicago styles they seem most relevant for the audiovisual types, especially music and video, where they help to identify conductors, directors, producers, and performers. To specify the role, use the fields editoratype, editorbtype, and editorctype, which see. (Cf. bernstein:shostakovich, handel:messiah.)

editortype Normally, with the exception of the article and review types, biblatex-chicago-notes will automatically find a name to put at the head of an entry, starting with an author, and proceeding in order through editor, translator, and namec (the compiler). If all four are missing, then the title will be placed at the head. (In article and review entries with a magazine entrysubtype, a missing author immediately prompts the use of journaltitle at the head of an entry. See above under article for details.) The editortype field, added in biblatex 0.7, provides even greater flexibility, giving you the ability to put a compiler at the head of an entry without using namec, freeing you from the need to use a sortkey and a shortauthor. You can do this even though an author is named (eliot:pound shows this mechanism in action for a standard editor, rather than a compiler). Two things are necessary for this to happen. First, in the options field you need to set useauthor=false, then you need to put the name you wish to see at the head of your entry into the editor or the namea field. If the "editor" is in fact a compiler, then you need to put compiler into the editortype field, and biblatex will print the correct string after the name in both the bibliography and in the long note form.

There are a few details of which you need to be aware. Because biblatex-chicago has added the namea field, which gives you the ability to identify the editor specifically of a title as opposed to a maintitle or a booktitle, the editortype mechanism checks first to see whether a namea is defined. If it is, that name will be used at the head of the entry, if it isn't it will go ahead and look for an editor. When the editor field is used, biblatex's sorting algorithms will work properly,

and also its labelname mechanism, meaning that a shortened form of the editor will be used in the short note form. If, however, the namea field provides the name, then your .bib entry will need to have a sortkey field to aid in alphabetizing, and it will also need a shorteditor defined to help with the short note form, not a shortauthor, ruled out because `useauthor=false`.

In biblatex 0.9 Lehman reworked the string concatenation mechanism, for reasons he outlined in his RELEASE file, and I have followed his lead. In short, if you define the editortype field, then concatenation is turned off, even if the name of the editor matches, for example, that of the translator. In the absence of an editortype, the usual mechanisms remain in place, that is, if the editor exactly matches a translator and/or a namec, or alternatively if namea exactly matches a nameb and/or a namec, then biblatex will print the appropriate strings. The *Manual* specifically (17.41) recommends not using these identifying strings in the short note form, and biblatex-chicago-notes follows their recommendation. If you nevertheless need to provide such a string, you'll have to do it manually in the shorteditor field, or perhaps, in a different sort of entry, in a shortauthor field.

It may also be worth noting that because of certain requirements in the specification – absence of an author, for example – the `useauthor` mechanism won't work properly in the following entry types: collection, letter, patent, periodical, proceedings, review, suppbook, suppcollection, and suppperiodical.

editoratype
editorbtype
editorctype   These fields identify the exact role of the person named in the corresponding editor[a-c] field. Note that they are not part of the string concatenation mechanism. I have implemented them just as the standard styles do, and they have now found a use particularly in music and video entries. Cf. bernstein:shostakovich, handel:messiah.

eid   Standard biblatex field, providing a string or number some journals use uniquely to identify a particular article. Only applicable to the article entry type. Not typically required by the *Manual*.

entrysubtype   Standard and very powerful biblatex field, left undefined by the standard styles. In biblatex-chicago-notes it has four very specific uses, the first three of which I have designed in order to maintain, as much as possible, backward compatibility with the standard styles. First, in article, periodical, and review entries, the field allows you to differentiate between scholarly "journals," on the one hand, and "magazines" and "newspapers" on the other. Usage is fairly simple: you need to put the exact string `magazine` into the entrysubtype field if you are citing one of the latter two types of source, whereas if your source is a "journal," then you need do nothing.

The second use involves references to works from classical antiquity and, according to the *Manual*, from the Middle Ages, as well. When you cite such a work using the traditional divisions into books, sections, lines, etc., divisions which are presumed to be the same across all editions, then you need to put the exact string `classical` into the entrysubtype field. This has no effect in long notes or in the bibliography, but it does affect the formatting of short notes, where it suppresses some of the punctuation. Ordinarily, you will use this toggle in a book or a bookinbook entry, but it is possible that a journal might well also present an edition of such a work. Given the tradition of using italics for the titles of such works, this may require using a titleaddon field (with hand formatting) instead of a title. If you wish to reference a classical or medieval work by the page numbers of a particular, non-standard edition, then you shouldn't use the entrysubtype toggle. Also, and the specification is reasonably clear about this, works from the Renaissance and later, even if cited by the traditional divisions, have short notes formatted normally, and therefore don't need an entrysubtype field. (See *Manual* 17.250–262; aristotle:metaphy:gr, plato:republic:gr; euripides:orestes is an example of a translation cited by page number in a modern edition.)

The third use occurs in misc entries. If such an entry contains no entrysubtype field, then the citation will be treated just as the standard biblatex styles would, including the use of italics for the title. Any string at all in entrysubtype tells biblatex-chicago-notes to treat the source as part of an unpublished archive. A misc entry with entrysubtype defined is the least formatted of all those specified by the *Manual* — see section 4.1 above under **misc** for all the details on how these citations work.

Fourth, and finally, the field can be defined in the new artwork entry type in order to refer to a work from antiquity whose title you do not wish to be italicized. Please see the documentation of artwork above for the details.

eventdate   This is a standard biblatex field, added recently to the **music** entry type in case users need it to identify a particular recording session or concert. See the documentation of that type above. The field will currently be ignored in any other sort of entry.

foreword   As with the afterword field above, foreword will in general function as it does in standard biblatex. Like afterword (and introduction), however, it has a special meaning in a suppbook entry, where you simply need to define it somehow (and leave afterword and introduction undefined) to make a foreword the focus of a citation.

holder   A standard biblatex field for identifying a patent's holder(s), if they differ from the author. The *Manual* has nothing to say on the subject, but biblatex-chicago-notes prints it (them), in parentheses, just after the author(s).

howpublished   Standard biblatex field, mainly applicable in the booklet entry type, where it replaces the publisher. I have also retained it in the misc and unpublished entry types, for historical reasons, and either it or pubstate can be used in music entries to clarify publication details.

institution   Standard biblatex field. In the thesis entry type, it will usually identify the university for which the thesis was written, while in a report entry it may identify any sort of institution issuing the report.

introduction   As with the afterword and foreword fields above, introduction will in general function as it does in standard biblatex. Like those fields, however, it has a special meaning in a suppbook entry, where you simply need to define it somehow (and leave afterword and foreword undefined) to make an introduction the focus of a citation.

isbn   Standard biblatex field, for providing the International Standard Book Number of a publication. Not typically required by the *Manual*.

isrn   Standard biblatex field, for providing the International Standard Technical Report Number of a report. Only relevant to the report entry type, and not typically required by the *Manual*.

issn   Standard biblatex field, for providing the International Standard Serial Number of a periodical in an article or a periodical entry. Not typically required by the *Manual*.

issue   Standard biblatex field, designed for article, periodical, or review entries identified by something like "Spring" or "Summer" rather than by the usual month or number fields (brown:bremer).

issuesubtitle   The subtitle for an issuetitle — see next entry.

issuetitle   Standard biblatex field, intended to contain the title of a special issue of any sort of periodical. If the reference is to one article within the special issue, then

this field should be used in an article entry (conley:fifthgrade), whereas if you are citing the entire issue as a whole, then it would go in a periodical entry, instead (good:wholeissue). The note field is the proper place to identify the type of issue, e.g., special issue, with the initial letter lower-cased to enable automatic contextual capitalization.

journalsubtitle The subtitle for a journaltitle — see next entry.

journaltitle Standard biblatex field, replacing the standard BibTeX field journal, which, however, still works as an alias. It contains the name of any sort of periodical publication, and is found in the article and review entry types. In the case where a piece in an article or review (entrysubtype magazine) doesn't have an author, biblatex-chicago-notes provides for this field to be used as the author. See above (section 4.1) under **article** for details. The lakeforester:pushcarts and nyt:trevorobit entries in notes-test.bib will give you some idea of how this works.

keywords This field is biblatex's extremely powerful and flexible technique for filtering bibliography entries, allowing you to subdivide a bibliography according to just about any criteria you care to invent. See biblatex.pdf (3.10.4) for thorough documentation. In biblatex-chicago, the field can provide a convenient means to exclude certain entries from making their way into a bibliography. We have already seen (**letter**, above) how the *Manual* (17.78) requires, in the case of published collections of letters, that when more than one letter from the same collected is cited, the bibliography should contain only a reference to the collection as a whole (white:ross:memo, white:russ, white:total). Similarly, when citing both an original text and its translation (see **userf**, below), the *Manual* (17.66) suggests including the original at the end of the translation's bibliography entry, a procedure which requires that the original not also be printed as a separate bibliography entry (furet:passing:eng, furet:passing:fr, aristotle:metaphy:trans, aristotle:metaphy:gr). Finally, citations of well-known reference works (like the *Encyclopaedia Britannica*, for example), need only be presented in notes, and not in the bibliography (17.238–239; ency:britannica, wikiped:bibtex; see inreference, above). In all these cases, I have suggested the inclusion of original in the keywords field, along with a notkeyword=original in the optional argument to the \printbibliography command, though of course you can choose any key you wish.

language A standard biblatex field, designed to allow you to specify the language(s) in which a work is written. As a general rule, the Chicago style doesn't require you to provide this information, though it may well be useful for clarifying the nature of certain works, such as bilingual editions, for example. There is at least one situation, however, when the *Manual* does specify this data, and that is when the title of a work is given in translation, even though no translation of the work has been published, something that might happen when a title is in a language deemed to be unparseable by a majority of your expected readership (17.65–67, 17.166, 17.177; pirumova, rozner:liberation). In such a case, you should provide the language(s) involved using this field, connecting multiple languages using the keyword and. (I have retained biblatex's \bibstring mechanism here, which means that you can use the standard bibstrings or, if one doesn't exist for the language you need, just give the name of the language, capitalized as it should appear in your text. You can also mix these two modes inside one entry without apparent harm.)

An alternative arrangement suggested by the *Manual* is to retain the original title of a piece but then to provide its translation, as well. If you choose this option, you'll need to make use of the **usere** field, on which see below. In effect, you'll probably only ever need to use one of these two fields in any given entry, and in fact biblatex-chicago-notes will only print one of them if both are present, preferring usere over language for this purpose (see kern and weresz). Note also that both of these fields are universally associated with the title of a work,

rather than with a booktitle or a maintitle. If you need to attach a language or a translation to either of the latter two, you could probably manage it with special formatting inside those fields themselves.

lista I intend this field specifically for presenting citations from reference works that are arranged alphabetically, where the name of the item rather than a page or volume number should be given. The field is a biblatex list, which means you should separate multiple items with the keyword and. Each item receives its own set of quotation marks, and the whole list will be prefixed by the appropriate string ("s.v.," *sub verbo*, pl. "s.vv."). Biblatex-chicago-notes will only print such a field in a book or an inreference entry, and you should look at the documentation of these entry types for further details. (See *Manual* 17.238–239; ency:britannica, grove:sibelius, times:guide, wikiped:bibtex.)

location This is biblatex's version of the usual BIBTEX field address, though the latter is accepted as an alias if that simplifies the modification of older .bib files. According to the *Manual* (17.99), a citation usually need only provide the first city listed on any title page, though a list of cities separated by the keyword "and" will be formatted appropriately. If the place of publication is unknown, you can use \autocap{n}.p. instead (17.102), though in many or even most cases this isn't strictly necessary (17.32–34; virginia:plantation). For all cities, you should use the common English version of the name, if such exists (17.101).

Two more details need explanation here. In article, periodical, and review entries, there is usually no need for a location field, but "if a journal might be confused with another with a similar title, or if it might not be known to the users of a bibliography," then this field can present the place or institution where it is published (17.174, 17.196; lakeforester:pushcarts, kimluu:diethyl, and garrett). Less predictably, it is here that *Manual* indicates that a particular book is a reprint edition (17.123), so in such a case you can use the biblatex-chicago macro \reprint, followed by a comma, space, and the location (aristotle:metaphy:gr, schweitzer:bach). (You can also now, somewhat more simply, just put the string reprint into the pubstate field to achieve the same result. See the pubstate documentation below.) The origdate field may be used to give the original date of publication, and of course more complicated situations should usually be amenable to inclusion in the note field (emerson:nature).

mainsubtitle The subtitle for a maintitle — see next entry.

maintitle The main title for a multi-volume work, e.g., "Opera" or "Collected Works." (See donne:var, euripides:orestes, harley:cartography, lach:asia, pelikan:christian, and plato:republic:gr.)

maintitleaddon An annex to the maintitle, for which see previous entry. Such an annex would be printed in the main text font. If your data begins with a word that would ordinarily only be capitalized at the beginning of a sentence, then simply ensure that that word is in lowercase, and biblatex-chicago-notes will automatically do the right thing.

month Standard biblatex field, containing the month of publication. This should be an integer, i.e., month={3} not month={March}. See date for more information.

namea This is one of the fields biblatex provides for style writers to use, but which it leaves undefined itself. In biblatex-chicago it contains the name(s) of the editor(s) of a title, if the entry has a booktitle or maintitle, or both, in which situation the editor would be associated with one of these latter fields (donne:var). You should present names in this field exactly as you would those in an author or editor field, and the package will concatenate this field with nameb if they are identical. See under **editor** above for the full details. Cf. also nameb, namec, translator, and the macros \partedit, \parttrans, \parteditandtrans,

\partcomp, \parteditandcomp, \parttransandcomp, and \partedittransand-comp, for which see section 4.3.1.

nameaddon This field is provided by biblatex, though not used by the standard styles. In biblatex-chicago, it allows you, in most entry types, to specify that an author's name is a pseudonym, or to provide either the real name or the pseudonym itself, if the other is being provided in the author field. The abbreviation "pseud." (always lowercase in English) is specified, either on its own or after the pseudonym (centinel:letters, creasey:ashe:blast, creasey:morton:hide, creasey:york:death, and lecarre:quest); \bibstring{pseudonym} does the work for you. See under **author** above for the full details.

In the customc entry type, on the other hand, which is used to create alphabetized cross-references to other bibliography entries, the nameaddon field allows you to change the default string linking the two parts of the cross-reference. The code automatically tests for a known bibstring, which it will italicize. Otherwise, it prints the string as is.

nameb Like namea, above, this is a field left undefined by the standard biblatex styles. In biblatex-chicago, it contains the name(s) of the translator(s) of a title, if the entry has a booktitle or maintitle, or both, in which situation the translator would be associated with one of these latter fields (euripides:orestes). You should present names in this field exactly as you would those in an author or translator field, and the package will concatenate this field with namea if they are identical. See under the **translator** field below for the full details. Cf. also namea, namec, origlanguage, translator, userf and the macros \partedit, \parttrans, \parteditandtrans, \partcomp, \parteditandcomp, \parttransandcomp, and \partedittransandcomp in section 4.3.1.

namec The *Manual* (17.41) specifies that works without an author may be listed under an editor, translator, or compiler, assuming that one is available, and it also specifies the strings to be used with the name(s) of compiler(s). All this suggests that the *Manual* considers this to be standard information that should be made available in a bibliographic reference, so I have added that possibility to the many that biblatex already provides, such as the editor, translator, commentator, annotator, and redactor, along with writers of an introduction, foreword, or afterword. Since biblatex.bst doesn't offer a compiler field, I have adopted for this purpose the otherwise unused field namec. It is important to understand that, despite the analogous name, this field does not function like namea or nameb, but rather like editor or translator, and therefore if used will be associated with whichever title field these latter two would be were they present in the same entry. Identical fields among these three will be concatenated by the package, and concatenated too with the (usually) unnecessary commentator, annotator and the rest. Also please note that I've arranged the concatenation algorithms to include namec in the same test as namea and nameb, so in this particular circumstance you can, if needed, make namec analogous to these two latter, title-only fields. (See above under **editortype** for details of how you may, in certain circumstances, use that field to identify a compiler. This method will be particularly useful if you don't need to concatenate the namec with any other role, because if you use the editor field biblatex will automatically attend to alphabetization and name-replacement in the bibliography, and will also provide a name for short notes.)

It might conceivably be necessary at some point to identify the compiler(s) of a title separate from the compiler(s) of a booktitle or maintitle, but for the moment I've run out of available name fields, so you'll have to fall back on the \partcomp macro or the related \parteditandcomp, \parttransandcomp, and \partedittransandcomp, on which see Commands (section 4.3.1) below. (Future releases may be able to remedy this.) It may be as well to mention here too that of the three names that can be substituted for the missing author at the head

of an entry, biblatex-chicago-notes will choose an editor if present, then a translator if present, falling back to namec only in the absence of the other two, and assuming that the fields aren't identical, and therefore to be concatenated. In a change from the previous behavior, these algorithms also now test for namea or nameb, which will be used instead of editor and translator, respectively, giving the package the greatest likelihood of finding a name to place at the head of an entry. Please remember, however, that if this name is supplied by any of the non-standard fields name[a-c], then you will need to provide a sortkey to assist with alphabetization in the bibliography, and also a shortauthor for the short note form.

note As in standard biblatex, this field allows you to provide bibliographic data that doesn't easily fit into any other field. In this sense, it's very like addendum, but the information provided here will be printed just before the publication data. (See chaucer:alt, chaucer:liferecords, cook:sotweed, emerson:nature, and rodman:walk for examples of this usage in action.) It also has a specialized use in all the periodical types (article, periodical, and review), where it holds supplemental information about a journaltitle, such as "special issue" (conley:fifthgrade, good:wholeissue). In all uses, if your data begins with a word that would ordinarily only be capitalized at the beginning of a sentence, then simply ensure that that word is in lowercase, and biblatex-chicago-notes will automatically do the right thing. Cf. addendum.

number This is a standard biblatex field, containing the number of a journaltitle in an article or review entry, the number of a title in a periodical entry, or the volume/number of a book in a series. Generally, in an article, periodical, or review entry, this will be a plain cardinal number, but in such entries biblatex-chicago now does the right thing if you have a list or range of numbers (unsigned:ranke:15). In any book-like entry the field may well contain considerably more information, including even a reference to "2nd ser.," for example, while the series field in such an entry will contain the name of the series, rather than a number. This field is also the place for the patent number in a patent entry. Cf. issue and series. (See *Manual* 17.90–95 and boxer:china, palmatary:pottery, wauchope:ceramics; 17.163 and beattie:crime, conley:fifthgrade, friedman:learning, garrett, gibbard, hlatky:hrt, mcmillen:antebellum, rozner:liberation, warr:ellison.)

NB: This may be an opportune place to point out that the *Manual* (17.129) prefers arabic to roman numerals in most circumstances (chapters, volumes, series numbers, etc.), even when such numbers might be roman in the work cited. The obvious exception is page numbers, in which roman numerals indicate that the citation came from the front matter, and should therefore be retained. Another possible exception is in references to works "with many and complex divisions," in which "a mixture of roman and arabic" may be "easier to disentangle."

options A standard biblatex field, for setting certain options on a per-entry basis rather than globally. Information about some of the more common options may be found above under author and below in section 4.4. See chaucer:alt, eliot:pound, herwign:office, lecarre:quest, and mla:style for examples of the field in use.

organization A standard biblatex field, retained mainly for use in the misc, online, and manual entry types, where it may be of use to specify a publishing body that might not easily fit in other categories. In biblatex, it is also used to identify the organization sponsoring a conference in a proceedings or inproceedings entry, and I have retained this as a possibility, though the *Manual* is silent on the matter.

origdate This is a new biblatex field, replacing the obsolete origyear, and allowing more than one full specification for those references which need to provide more than one date. As with the analogous date field, you provide the date (or range of dates) in iso8601 format, i.e., yyyy-mm-dd. In most entry types, you would use

origdate to provide the date of first publication of a work, most usually needed only in the case of reprint editions, but also recommended by the *Manual* for electronic editions of older works (17.123, 17.146–7; aristotle:metaphy:gr, emerson:nature, james:ambassadors, schweitzer:bach). In the letter and misc (with entrysubtype) entry types, the origdate identifies when a letter (or similar) was written. In such misc entries, some "non-letter-like" materials (like interviews) need the date field for this purpose, while in letter entries the date applies to the publication of the whole collection. If such a published collection were itself a reprint, improvisation in the location field might be able to rescue the situation. (See jackson:paulina:letter, white:ross:memo, white:russ, and white:total for how letter entries usually work; creel:house shows the field in action in a misc entry, while spock:interview uses date.)

Because the origdate field only accepts numbers, some improvisation may be needed if you wish to include "n.d." (`\bibstring{nodate}`) in an entry. In letter and misc, this information can be placed in titleaddon, but in other entry types you may need to use the location field.

origlanguage In keeping with the *Manual*'s specifications, I have fairly thoroughly redefined biblatex's facilities for treating translations. The origtitle field isn't used, while the language and origdate fields have been press-ganged for other duties. The origlanguage field, for its part, retains a dual role in presenting translations in a bibliography. The details of the *Manual*'s suggested treatment when both a translation and an original are cited may be found below under **userf**. Here, however, I simply note that the introductory string used to connect the translation's citation with the original's is "Originally published as," which I suggest may well be inaccurate in a great many cases, as for instance when citing a work from classical antiquity, which will most certainly not "originally" have been published in the Loeb Classical Library. Although not, strictly speaking, authorized by the *Manual*, I have provided another way to introduce the original text, using the origlanguage field, which must be provided *in the entry for the translation, not the original text* (aristotle:metaphy:trans). If you put one of the standard biblatex bibstrings there (enumerated below), then the entry will work properly across multiple languages. Otherwise, just put the name of the language there, localized as necessary, and biblatex-chicago will eschew "Originally published as" in favor of, e.g., "Greek edition:" or "French edition:". This has no effect in notes, where only the work cited — original or translation — will be printed, but it may help to make the *Manual*'s suggestions for the bibliography more palatable.

That was the first usage, in keeping at least with the spirit of the *Manual*. I have also, perhaps less in keeping with that specification, retained some of biblatex's functionality for this field. If an entry doesn't have a userf field, and therefore won't be combining a text and its translation in the bibliography, you can also use origlanguage as Lehman intended it, so that instead of saying, e.g., "translated by X," the entry will read "translated from the German by X." The *Manual* doesn't mention this, but it may conceivably help avoid certain ambiguities in some citations. As in biblatex, if you wish to use this functionality, you have to provide *not* the name of the language, but rather a bibliography string, which may, at the time of writing, be one of `american`, `brazilian`, `danish`, `dutch`, `english`, `french`, `german`, `greek`, `italian`, `latin`, `norwegian`, `portuguese`, `spanish`, or `swedish`, to which I've added `russian`.

origlocation At least one example in the *Manual* provides a more complete specification of a reprinted book's original publication details than has been possible using previous releases of biblatex-chicago (17.123). Starting with this release, you can provide both an origlocation and an origpublisher to go along with the origdate, should you so wish, and all of this information will be printed in long notes and bibliography. You can now also use this field in a letter or misc (with entrysubtype) entry to give the place where a published or unpublished letter

was written (17.76). (Jonathan Robinson has suggested that the origlocation may in some circumstances actually be necessary for disambiguation, his example being early printed editions of the same material printed in the same year but in different cities. The new functionality should make this simple to achieve. Cf. origdate, origpublisher and pubstate; schweitzer:bach.)

origpublisher   As with the origlocation field just above, this new field allows you to provide fuller original publication details for reprinted books (17.123). You can now provide an origpublisher and/or an origlocation in addition to the origdate, and all will be presented in long notes and bibliography. (Cf. origdate, origlocation, and pubstate; schweitzer:bach.)

origyear   This field is, as of biblatex 0.9, obsolete. It is ignored if it appears in a .bib file.

pages   This is the standard biblatex field for providing page references. In many article and review entries you'll find this contains something other than a page number, e.g. a section name or edition specification (17.188, 17.191, 17.202; kozinn:review, nyt:obittrevor, nyt:trevorobit). Of course, the same may be true of almost any sort of entry, though perhaps with less frequency. Curious readers may wish to look at brown:bremer (17.172) for an example of a pages field used to facilitate reference to a two-part journal article. Cf. number for more information on the *Manual*'s preferences regarding the formatting of numerals; bookpagination and pagination provide details about biblatex's mechanisms for specifying what sort of division a given pages field contains; and usera discusses a different way to present the section information pertaining to a newspaper article.

pagination   This, a standard biblatex field, allows you automatically to prefix the appropriate identifying string to information you provide in the postnote field of a citation command, whereas bookpagination allows you to prefix a string to the pages field. Please see **bookpagination** above for all the details on this functionality, as aside from the difference just mentioned the two fields are equivalent.

part   Standard biblatex field, which identifies physical parts of a single logical volume in book-like entries, not in periodicals. It has the same purpose in biblatex-chicago-notes, but because the *Manual* (17.88) calls such a thing a "book" and not a "part," the string printed in notes and bibliography will, at least in English, be "bk." instead of the plain dot between volume number and part number (harley:cartography, lach:asia). This field should only be used in association with a volume number, so if you need to identify "parts" or "books" that are part of a published series, for example, then you'll need to use a different field, (which in this case would be number [palmatary:pottery]). Cf. volume.

publisher   Standard biblatex field. Remember that "and" is a keyword for connecting multiple publishers, so if a publisher's name contains "and," then you should either use the ampersand (&) or enclose the whole name in additional braces. (See *Manual* 17.103–114; aristotle:metaphy:gr, cohen:schiff, creasey:ashe:blast, dunn:revolutions.)

There are, as one might expect, a couple of further subtleties involved here. Ordinarily, two publishers will be separated by a forward slash in both notes and bibliography, but if a company issues "certain books through a special publishing division or under a special imprint," then the two names will be separated by a comma, which you will need to provide in the publisher field. The *Manual*'s example (17.112) is "Ohio University Press, Swallow Press," which would cause biblatex-chicago-notes no problems. If a book has two co-publishers, "usually in different countries," (17.113) then the simplest thing to do is to choose one, probably the nearest one geographically. If you feel it necessary to include both, then levistrauss:savage demonstrates one way of doing so, using a combination of the publisher and location fields. Finally, if

the publisher is unknown, then the *Manual* recommends (17.109) simply using the place (if known) and the date. If for some reason you need to indicate the absence of a publisher, the abbreviation given by the *Manual* is `n.p.`, though this can also stand for "no place." Some style guides apparently suggest using `s.n.` (= *sine nomine*) to specify the lack of a publisher, but the *Manual* doesn't mention this.

pubstate Due to specific requirements in the author-date style, I have implemented this field there as a way of providing accurate citations of reprinted books. As the functionality seemed useful, I have also included some of it in biblatex-chicago-notes. In previous releases you could identify a reprint by placing `\bibstring{reprint}` in the location field, followed by a comma, and the style would print the appropriate string in notes and bibliography. Now, if it is more convenient, easier to remember, or if you want to reuse your .bib database for the author-date style, you can simply put the string `reprint` into the pubstate field, and the package will take care of everything for you. Both of these methods will now work just fine, but please choose only one per entry, otherwise the string will be printed twice. Please note, also, that this automatic mechanism has been disabled in music and video entries, as it isn't appropriate to those sorts of material. In the latter, pubstate will be silently ignored, whereas in the former, for compatibility with the author-date style, the field functions as a synonym for howpublished, and will be printed verbatim. Currently, if you put anything besides `reprint` in the pubstate field of anything except music entries, it too will silently be ignored, but this may change in future releases.

redactor I have implemented this field just as biblatex's standard styles do, even though the *Manual* doesn't actually mention it. It may be useful for some purposes. Cf. annotator and commentator.

reprinttitle **NB: Please note that this feature is in an alpha state, and that I'm contemplating using a different field in the future for this functionality. I include it here in the hope that it might receive some testing in the meantime.** At the request of Will Small, I have included a means of providing the original publication details of an essay or a chapter that you are citing from a subsequent reprint, e.g., a *Collected Essays* volume. In such a case, at least according to the *Manual* (17.73), such details needn't be provided in notes, only in the bibliography, and then only if these details are "of particular interest." The data would follow an introductory phrase like "originally published as," making the problem strictly parallel to that of including details of a work in the original language alongside the details of its translation. I have addressed the latter problem with the userf field, which provides a sort of cross-referencing method for this purpose, and reprinttitle works in *exactly* the same way. In the .bib entry for the reprint you include a cross-reference to the cite key of the original location using the reprinttitle field (which it may help mnemonically to think of as a "reprinted title" field). The main difference between the two forms is that userf prints all but the author of the original work, whereas reprinttitle suppresses both the author and the title of the original, giving only the more general details, beginning with, e.g., the journaltitle or booktitle and continuing from there. The string prefacing this information will be "Originally published in." Please see the documentation on userf below for all the details on how to create .bib entries for presenting your data.

series A standard biblatex field, usually just a number in an article, periodical, or review entry, almost always the name of a publication series in book-like entries. If you need to attach further information to the series name in a book-like entry, then the number field is the place for it, whether it be a volume, a number, or even something like "2nd ser." or "`\bibstring{oldseries}`." Of course, you can also use `\bibstring{oldseries}` or `\bibstring{newseries}` in an article entry, but there you would place it in the series field itself. (In fact, the series field

in article, periodical, and review entries is one of the places where biblatex allows you just to use the plain bibstring `oldseries`, for example, rather than making you type `\bibstring{oldseries}`. The type field in manual, patent, report, and thesis entries also has this auto-detection mechanism in place; see the discussion of `\bibstring` below for details.) In whatever entry type, these bibstrings produce the required abbreviation, which thankfully is the same in both notes and bibliography. (For books and similar entries, see *Manual* 17.90–95; boxer:china, browning:aurora, palmatary:pottery, plato:republic:gr, wauchope:ceramics; for periodicals, see 17.178; garaud:gatine, sewall:letter.) Cf. number for more information on the *Manual*'s preferences regarding the formatting of numerals.

shortauthor
This is a standard biblatex field, but biblatex-chicago-notes makes considerably greater use of it than the standard styles. For the purposes of the Chicago style, the field provides the name to be used in the short form of a footnote. In the vast majority of cases, you don't need to specify it, because the biblatex system selects the author's last name from the author field and uses it in such a reference, but in a few cases this default behavior won't work. In books without an author and listed under an editor, biblatex does the right thing and uses the surname of the editor in a short note (zukowsky:chicago), but if the work is listed under a compiler (or any of the non-standard names name[a-c]), you need to provide that person's name in shortauthor, and also remember to provide a sortkey to make sure the work will be alphabetized correctly in the bibliography. (The current version of biblatex will now automatically alphabetize by translator if that is the name given at the head of an entry.) You no longer, however, need to provide one in an author-less article or review entry (entrysubtype `magazine`), where you allow biblatex-chicago-notes to use the journaltitle as the author, nor in author-less manual entries, where the organization will be so used. The style now automatically provides the same substitution in the short note form, though you'll still need to help the alphabetization routines by providing a sortkey field in such cases (dyna:browser, gourmet:052006, lakeforester:pushcarts, nyt:trevorobit).

As mentioned under editortype, the *Manual* (17.41) recommends against providing the identifying string (e.g., ed. or trans.) in the short note form, and biblatex-chicago-notes follows their recommendation. If you need to provide these strings in such a citation, then you'll have to do so by hand in the shortauthor field, or in the shorteditor field, whichever you are using.

shorteditor
Like shortauthor, a field to provide a name for a short footnote, in this case for, e.g., a collection entry that typically lacks an author. The shortauthor field works just as well in most situations, but if you have set `useauthor=false` (and not `useeditor=false`) in an entry's options field, then only shorteditor will be recognized. Cf. editortype, above.

shorthand
This is biblatex's mechanism for using abbreviations in place of the usual short note form, and I've left it effectively unmodified in biblatex-chicago-notes, apart from a few formatting tweaks. Any entry which contains such a field will produce a normal first note, either long or short according to your package options, informing the reader that the work will hereafter be cited by this abbreviation. As in biblatex, the `\printshorthands` command will produce a formatted list of abbreviations for reference purposes, a list which the *Manual* suggests should be placed either in the front matter (when using footnotes) or before the endnotes, in case these are used. (See 16.39–40, and also biblatex.pdf for more information.)

As I mentioned above under **crossref**, extra care is needed when using shorthands with cross-references, and I would avoid them in all parent entries, at least in the current state of biblatex-chicago-notes.

shorthandintro
When you include a shorthand in an entry, it will ordinarily appear the first time you cite the work, at the end of a long note, prefaced by the phrase "Henceforth cited as." With this standard biblatex field, you can change that phrase to suit

your needs. Please note, first, that you need to include the shorthand in this field as you intend it to appear and, second, that you still need the shorthand field present in order to ensure the appropriate presentation of the shorthand in later citations and in the list of shorthands.

shorttitle A standard biblatex field, primarily used to provide an abbreviated title for short notes. In biblatex-chicago-notes, you need to take particular care with letter entries, where, as explained above, the *Manual* requires a special format ("to Recipient"). (See 17.76–78; jackson:paulina:letter, white:ross:memo, white:russ.) Some misc entries (with an entrysubtype) also need special attention. (See creel:house, where the full title is used as the shortauthor + shorttitle by using \headlesscite commands. Placing \isdot into the shortauthor field no longer works in biblatex 1.6 and later, so be sure to check your .bib files when you upgrade.) Remember, also, that the generic titles in review and misc entries may not want capitalization in all contexts, so, as with the title field, if you begin a shorttitle with a lowercase letter the style will do the right thing (barcott:review, bundy:macneil, Clemens:letter, kozinn:review, ratliff:review, unsigned:ranke:15).

sortkey A standard biblatex field, designed to allow you to specify how you want an entry alphabetized in a bibliography. In general, if an entry doesn't turn up where you expect or want it, this field should provide the solution. More particularly, entries without an author or an editor, or with a corporate author beginning with the definite or indefinite article, will usually require your assistance in this way (chaucer:alt, cotton:manufacture:15, gourmet:052006, lakeforester:pushcarts, nyt:obittrevor, nyt:trevorobit, silver:gawain, unsigned:ranke:15, virginia:plantation). Lehman also provides **sortname**, **sorttitle**, and **sortyear** for more fine-grained control. Please consult biblatex.pdf for the details.

subtitle The subtitle for a title — see next entry.

title In the vast majority of cases, this field works just as it always has in BibTEX, and just as it does in biblatex. Nearly every entry will have one, the most likely exceptions being incollection or online entries with a merely generic title, instead of a specific one (centinel:letters, powell:email). The main source of difficulties flows from the *Manual*'s rules for formatting titles, rules which also hold for booktitles and maintitles. The whole point of using a BibTEX-based system is for it to do the formatting for you, and in most cases biblatex-chicago-notes does just that, surrounding titles with quotation marks, italicizing them, or occasionally just leaving them alone. When, however, a title is quoted within a title, then you need to know some of the rules. A summary here should serve to clarify them, and help you to understand when biblatex-chicago-notes might need your help in order to comply with them.

The internal rules of biblatex-chicago-notes are as follows:

Italics: booktitle, maintitle, and journaltitle in all entry types; title of artwork, book, bookinbook, booklet, collection, inbook, manual, misc (with no entrysubtype), periodical, proceedings, report, suppbook, and suppcollection entry types.

Quotation Marks: title of article, image, incollection, inproceedings, online, patent, periodical, thesis, and unpublished entry types, issuetitle in article, periodical, and review entry types.

Unformatted: booktitleaddon, maintitleaddon, and titleaddon in all entry types, title of customc, letter, misc (with an entrysubtype), review, and suppperiodical entry types.

Italics or Quotation Marks: All of the audiovisual entry types — audio, music, and video — have to serve as analogues both to book and to inbook.

Therefore, if there is both a title and a booktitle, then the title will be in quotation marks. If there is no booktitle, then the title will be italicized.

Now, the rules for which entry type to use for which sort of work tend to be fairly straightforward, but in cases of doubt you can consult section 4.1 above, the examples in notes-test.bib, or go to the *Manual* itself, 8.164–210. Assuming, then, that you want to present a title within a title, and you know what sort of formatting each of the two would, on its own, require, then the following rules apply:

1. Inside an italicized title, all other titles are enclosed in quotation marks and italicized, so in such cases all you need to do is provide the quotation marks using \mkbibquote, which will take care of any following punctuation that needs to be brought within the closing quotation mark(s) (17.58; donne:var, mchugh:wake).

2. Inside a quoted title, you should present another title as it would appear if it were on its own, so in such cases you'll need to do the formatting yourself. Within the double quotes of the title another quoted title would take single quotes — the \mkbibquote command does this for you automatically, and also, I repeat, takes care of any following punctuation that needs to be brought within the closing quotation mark(s). (See 17.157; garrett, loften:hamlet, murphy:silent, white:callimachus.)

3. Inside a plain title (most likely in a review entry or a titleaddon field), you should present another title as it would appear on its own, once again formatting it yourself using \mkbibemph or \mkbibquote. (barcott:review, gibbard, osborne:poison, ratliff:review, unsigned:ranke:15).

The *Manual* provides a few more rules, as well. A word normally italicized in text should also be italicized in a quoted or plain-text title, but should be in roman ("reverse italics") in an italicized title. A quotation used as a (whole) title (with or without a subtitle) retains its quotation marks when it is quoted or plain, but loses them when it is italicized (17.60, 17.157; lewis). A word or phrase in quotation marks, but that isn't a quotation, retains those marks in all title types (kimluu:diethyl).

Finally, please note that in all review (and suppperiodical) entries, and in misc entries with an entrysubtype, and only in those entries, biblatex-chicago-notes will automatically capitalize the first word of the title after sentence-ending punctuation, assuming that such a title begins with a lowercase letter in your .bib database. See **\autocap** below for more details.

titleaddon Standard biblatex intends this field for use with additions to titles that may need to be formatted differently from the titles themselves, and biblatex-chicago-notes uses it in just this way, with the additional wrinkle that it can, if needed, replace the title entirely, and this in, effectively, any entry type, providing a fairly powerful, if somewhat complicated, tool for getting BibTeX to do what you want (cf. centinel:letters, powell:email). This field will always be unformatted, that is, neither italicized nor placed within quotation marks, so any formatting you may need within it you'll need to provide manually yourself. The single exception to this rule is when your data begins with a word that would ordinarily only be capitalized at the beginning of a sentence, in which case you need then simply ensure that that word is in lowercase, and biblatex-chicago-notes will automatically do the right thing. See **\autocap**, below. (Cf. brown:bremer, osborne:poison, reaves:rosen, and white:ross:memo for examples where the field starts with a lowercase letter; morgenson:market provides an example where the titleaddon field, holding the name of a regular column in a newspaper, is capitalized, a situation that is handled as you would expect.)

translator As far as possible, I have implemented this field as biblatex's standard styles do, but the requirements specified by the *Manual* present certain complications that need explaining. Lehman points out in his documentation that the translator field will be associated with a title, a booktitle, or a maintitle, depending on the sort of entry. More specifically, biblatex-chicago associates the translator with the most comprehensive of those titles, that is, maintitle if there is one, otherwise booktitle, otherwise title, if the other two are lacking. In a large number of cases, this is exactly the correct behavior (adorno:benj, centinel:letters, plato:republic:gr, among others). Predictably, however, there are numerous cases that require, for example, an additional translator for one part of a collection or for one volume of a multi-volume work. For these cases I have provided the nameb field. You should format names for this field as you would for author or editor, and these names will always be associated with the title (euripides:orestes).

I have also provided a namea field, which holds the editor of a given title (euripides:orestes). If namea and nameb are the same, biblatex-chicago will concatenate them, just as biblatex already does for editor, translator, and namec (i.e., the compiler). Furthermore, it is conceivable that a given entry will need separate translators for each of the three sorts of title. For this, and for various other tricky situations, there is the \parttrans macro (and its siblings), designed to be used in a note field or in one of the titleaddon fields (ratliff:review). (Because the strings identifying a translator differ in notes and bibliography, one can't simply write them out in such a field, hence the need for a macro, which I discuss further in the commands section below [4.3.1].)

Finally, as I detailed above under **author**, in the absence of an author or an editor, the translator will be used at the head of an entry (silver:gawain), and the bibliography entry alphabetized by the translator's name, behavior that can be controlled with the usetranslator switch in the options field. Cf. author, editor, namea, nameb, and namec.

type This is a standard biblatex field, and in its normal usage serves to identify the type of a manual, patent, report, or thesis entry. Biblatex 0.7 introduced the ability, in some circumstances, to use a bibstring without inserting it in a \bibstring command, and in these entry types the type field works this way, allowing you simply to input, e.g., patentus rather than \bibstring{patentus}, though both will work. (See petroff:impurity; herwign:office, murphy:silent, and ross:thesis all demonstrate how the type field may sometimes be automatically set in such entries by using one of the standard entry-type aliases).

With the arrival of Lehman's remarkable punctuation-tracking code in biblatex 0.8, there can be almost no use for the type field as a switch for the \custpunct macro, so I have been able to reuse it in order to generalize the functioning of the suppbook entry type, and of its alias suppcollection. In such entries, you can now use the type field to specify what sort of supplemental material you are citing, e.g., "preface to" or "postscript to." Cf. suppbook above for the details. (See *Manual* 17.74–75; polakow:afterw, prose:intro).

You can also use the type field in artwork, audio, image, music, and video entries to identify the medium of the work, e.g., `oil on canvas`, `albumen print`, `compact disc` or `MPEG`. If the first word in this field would normally only be capitalized at the beginning of a sentence, then leave it in lowercase in your .bib file and biblatex will automatically do the right thing in citations. Cf. artwork, audio, image, music, and video, above, for all the details. (See auden:reading, bedford:photo, cleese:holygrail, leo:madonna, nytrumpet:art:15.)

url Standard biblatex field, it holds the url of an online publication, though you can provide one for all entry types. The required LaTeX package url will ensure that your documents format such references properly, in the text and in the reference apparatus.

urldate Standard biblatex field, it identifies exactly when you accessed a given url. This field would contain the whole date, in ɪꜱᴏ8601 format (evanston:library, grove:sibelius, hlatky:hrt, osborne:poison, sirosh:visualcortex, wikiped:bibtex). Please note that the **urlday**, **urlmonth**, and **urlyear** fields are all now obsolete.

usera A supplemental biblatex field which functions in biblatex-chicago almost as a "journaltitleaddon" field. In article, periodical, and review entries with entrysubtype magazine, the contents of this field will be placed, unformatted and between commas, after the journaltitle and before the date. The main use is for identifying the broadcast network when you cite a radio or television program (bundy:macneil), though you may also want to use it to identify the section of a newspaper in which you've found a particular article (morgenson:market). (See *Manual* 17.190, 17.207. As far as I can work out, newspaper section information may be placed either before the date [usera] or after it [pages]. Cp. kozinn:review [17.202] and morgenson:market [17.190]. The choice would appear to be yours.)

userb **NB: this field is now deprecated, mainly because it is very unlikely you will have any further need for the \custpunct macros. I leave the code, and the instructions for how to use it, in place, because it's barely possible that a need for it might still arise.** A supplemental biblatex field, with a very specific use in biblatex-chicago-notes. If the occasion does arise when you need to supply some context-sensitive punctuation yourself, then usually the \custpunct command will then be needed, controlled in certain circumstances by a toggle in the type field. If, however, you already need the type field for its regular usage in a suppbook, manual, patent, report, or thesis entry, and if you need to control the \custpunct with a toggle, then you'll have to use \custpunctb, toggled by putting the exact string plain in userb.

userc I have now implemented this supplemental biblatex field as part of Chicago's name cross-referencing system. (The "c" part is meant as a sort of mnemonic for this function, though it's perfectly possible to use the field in other contexts.) If you use the **customc** entry type to include alphabetized cross-references to other, separate entries in a bibliography, it is unlikely that you will cite the customc entry in the body of your text. Therefore, in order for it to appear in the bibliography, you have two choices. You can either include the entry key of the customc entry in a \nocite command inside your document, or you can place that entry key in the userc field of another .bib entry that you will be citing. In the latter case, biblatex-chicago will call \nocite for you, and this method should ensure that there will be at least one entry in the bibliography to which the cross-reference will point. (See 17.39–40; lecarre:cornwell, lecarre:quest.)

userd NB: this field is now obsolete. If it appears in a .bib file it will be ignored.

usere Another supplemental biblatex field, which biblatex-chicago uses specifically to provide a translated title of a work, something that may be needed if you deem the original language unparseable by a significant portion of your likely readership. The *Manual* offers two alternatives in such a situation: either you can translate the title and use that translation in your title field, providing the original language in language, or you can give the original title in title and the translation in usere. If you choose the latter, you may need to provide a shorttitle so that the short note form is also parseable. Cf. **language**, above. (See 17.65–67, 17.166, 17.177; kern, weresz.)

userf This is the last of the supplemental fields which biblatex provides, used by biblatex-chicago for a very specific purpose. When you cite both a translation and its original, the *Manual* (17.66) recommends that, in the bibliography at least, you combine references to both texts in one entry, though the presentation in notes is pretty much up to you. In order to follow this specification, I

have provided a third cross-referencing system (the others being crossref and xref), and have chosen the name userf because it might act as a mnemonic for its function.

In order to use this system, you should start by entering both the original and its translation into your .bib file, just as you normally would. The mechanism works for any entry type, and the two entries need not be of the same type. In the entry for the *translation*, you put the cite key of the original into the userf field. In the *original's* entry, you need to include a toggle in the keywords field that will prevent that entry from being printed separately in the bibliography — I have chosen the string `original`, and use `notkeyword=original` in the `\printbibliography` command, though you can use anything you want. In this standard case, the data for the translation will be printed first, followed by the string `originally published as`, followed by the original, author omitted, in what amounts to the same format that the *Manual* uses for long footnotes (furet:passing:eng, furet:passing:fr). As explained above (**origlanguage**), I have also included a way to modify the string printed before the original. In the entry for the *translation*, you put the original's language in origlanguage, and instead of `originally published as`, you'll get `French edition:` or `Latin edition:`, etc. (aristotle:metaphy:gr, aristotle:metaphy:trans).

venue Standard biblatex offers this field for use in proceedings and inproceedings entries, but I haven't yet implemented it, mainly because the *Manual* has nothing to say about it. Perhaps the organization field could be used, for the moment, instead. Anything in a venue field will be ignored.

version Standard biblatex field, currently only available in misc and patent entries in biblatex-chicago-notes.

volume Standard biblatex field. It holds the volume of a journaltitle in article (and some review) entries, and also the volume of a multi-volume work in many other sorts of entry. Cf. part.

volumes Standard biblatex field. It holds the total number of volumes of a multi-volume work, and its use in an entry triggers particular behavior in short notes referring to such an entry, which notes will not print any punctuation between the title of the work and the volume+page reference given in the optional postnote field of the relevant \cite command (17.134; meredith:letters). If this behavior is inconvenient in a particular entry, you may need to provide a shorttitle field ending in an \addcomma, though in such a case you'd need to ensure that the \cite command's postnote field contained something, as otherwise the note would end, wrongly, with a comma. (The *Manual* appears to be somewhat inconsistent on this question [cf. 16.47], so if this feature proves onerous in use I could remove it.)

xref A modified crossref field provided by biblatex. See **crossref**, above.

year Standard biblatex field. It usually identifies the year of publication, though unlike the date field it allows non-numeric input, so you can put "n.d." (or, to be language agnostic, \bibstring{nodate}) here if required, or indeed any other sort of non-numerical date information. If you can guess the date then you can include that guess in square brackets instead of, or after, the "n.d." abbreviation. Cf. bedford:photo, clark:mesopot, ross:leo, thesis:madonna.

4.3 Commands

In this section I shall attempt to document all those commands you may need when using biblatex-chicago-notes that I have either altered with respect to the standard provided by biblatex or that I have provided myself. Some of these, unfortunately, will make your .bib file incompatible with other biblatex styles,

but I've been unable to avoid this. Any ideas for more elegant, and more compatible, solutions will be warmly welcomed.

4.3.1 Formatting Commands

These commands allow you to fine-tune the presentation of your references in both notes and bibliography. You can find many examples of their usage in notes-test.bib, and I shall try to point you toward a few such entries in what follows. **NB:** biblatex's `\mkbibquote` command is now mandatory in some situations. See its entry below.

\autocap Version 0.8 of biblatex introduced the `\autocap` command, which capitalizes a word inside a note or bibliography entry if that word follows sentence-ending punctuation, and leaves it lowercase otherwise. As this command is both more powerful and more elegant than the kludge I designed for a previous version of biblatex-chicago-notes (see **\bibstring** below), you should be aware that the use of the single-letter `\bibstring` commands in your .bib file is obsolete.

In order somewhat to reduce the burden on users even further, I have, following Lehman's example, implemented a new system which automatically tracks the capitalization of certain fields in your .bib file. I chose these fields after a non-scientific survey of entries in my own databases, so of course if you have ideas for the extension of this facility I would be most interested to hear them. In order to take advantage of this functionality, all you need do is begin the data in the appropriate field with a lowercase letter, e.g., `note = {with the assistance of X}`. If the data begins with a capital letter — and this is not infrequent — that capital will always be retained. (cf., e.g., creel:house, morgenson:market.) If, on the other hand, you for some reason need such a field always to start with a lowercase letter, then you can try using the `\isdot` macro at the start, which turns off the mechanism without printing anything itself. Here, then, is the complete list of fields where this functionality is active:

1. The **addendum** field in all entry types.

2. The **booktitleaddon** field in all entry types.

3. The **edition** field in all entry types. (Numerals work as you expect them to here.)

4. The **maintitleaddon** field in all entry types.

5. The **note** field in all entry types.

6. The **shorttitle** field in the review (suppperiodical) entry type and in the misc type, in the latter case, however, only when there is an entrysubtype defined, indicating that the work cited is from an archive.

7. The **title** field in the review (suppperiodical) entry type and in the misc type, in the latter case, however, only when there is an entrysubtype defined, indicating that the work cited is from an archive.

8. The **titleaddon** field in all entry types.

9. The **type** field in artwork, audio, image, music, suppbook, suppcollection, and video entry types.

In any other cases — and there are only two examples of this in notes-test.bib (centinel:letters, powell:email) — you'll need to provide the `\autocap` command yourself. Indeed, if you accidentally do so in one of the above fields, it shouldn't matter at all, and you'll still get what you want, but taking advantage of the automatic provisions should at least save some typing.

\bibstring This is Lehman's very powerful mechanism to allow biblatex automatically to provide a localized version of a string, and to determine whether that string

needs capitalization, depending on where it falls in an entry. In the first release of biblatex-chicago-notes, the style relied very heavily on this macro, particularly on an extension I provided by defining all 26 letters of the (ASCII) alphabet as bibstrings (`\bibstring{a}`, `\bibstring{b}`, etc.) While you should continue to use the standard, whole-word bibstrings, **all use of the single-letter variants I formerly provided is obsolete, and will generate an error**. This functionality has been replaced by the `\autocap` command, which does the same thing, only more elegantly. This command was designed by Philipp Lehman, and has now been included in version 0.8 of biblatex. For yet greater convenience I have implemented, following Lehman's example, a system automating this functionality in all of the entry fields where its use was, by my reckoning, most frequent. This means that, when you require this functionality, all you need do is input the data in such a field starting with a lowercase letter, and biblatex-chicago-notes will do the rest with no further assistance. In my notes-test.bib file, this new mechanism in effect eliminated all need for the single-letter `bibstrings` and very nearly all need for the `\autocap` command — centinel:letters and powell:email being the only exceptions. Please see **\autocap** above for full details.

I should also mention here that biblatex 0.7 introduced a new functionality which sometimes allows you simply to input, for example, `newseries` instead of `\bibstring{newseries}`, the package auto-detecting when a bibstring is involved and doing the right thing, though in all such cases either form will work. This functionality is available in the series field of article, periodical, and review entries; in the type field of manual, patent, report, and thesis entries; in the location field of patent entries; in the language field in all entry types; and in the nameaddon field in customc entries. These are the places, as far as I can make out, where biblatex's standard styles support this feature, and I have added the last, style-specific, one. If Lehman generalizes it still further in a future release, I shall do the same, if possible.

\custpunct
\custpunctb
In common with other American citation styles, the *Manual* requires that the commas and periods separating units of a reference go inside any quotation marks that happen to be present. As of version 0.8c, biblatex contains truly remarkable code that handles this situation in very nearly complete generality, detecting punctuation after the closing quotation mark and moving it inside when necessary, and also controlling which punctuation marks can be printed after which other punctuation marks, whether quotation marks intervene or not. This functionality is now mature, and biblatex-chicago-notes relies on this code to place punctuation in the "American style," rather than on complicated `\DeclareFieldFormat` instructions that attempt to anticipate all possible permutations. One result of this, thankfully, is that both `\custpunct` and `\custpunctb` are now basically unnecessary, as their only purpose was to supply context-appropriate punctuation inside any quotation marks that users themselves provided as part of various entry fields. A second consequence, and I've already recommended this in previous releases anyway, is that users now *must* use `\mkbibquote` instead of `\enquote` or the usual LaTeX mechanisms inside their .bib files. For further details, please see the `\mkbibquote` entry below.

I have retained the code for the `\custpunct` commands in chicago-notes.cbx, in case a particularly gnarly entry might still require them, but I have already started to re-use the type field, which formerly served as a switch for `\custpunct`, in other contexts (see **artwork**, **image**, and **suppbook** above).

\isdot
This is a standard biblatex macro, which in previous releases of biblatex-chicago could function as a convenient placeholder in entry fields that, for one reason or another, you may have wanted to have defined and yet to print nothing. With the release of biblatex 1.6, this no longer works as before, a situation which has revealed a number of inconsistencies and bugs in my code, the rectification of which may therefore require some changes to your .bib files, assuming you've taken advantage of this mechanism. I believe that all the situations for-

merly calling for this specific use of the macro can now be addressed by more standard means, i.e., the \headlesscite commands and the useauthor=false declaration in the options field. (See creel:house, nyt:obittrevor, sewall:letter, unsigned:ranke:15, and white:total.)

\letterdatelong   I have provided this macro mainly for use in the optional postnote field of the various citation commands. When citing a letter (published or unpublished, letter or misc), it may be useful to append the date to the usual short note form in order to disambiguate references. This macro simply prints the date of a letter, or indeed of any other sort of correspondence. (If your main document language isn't English, it's better just to use the standard biblatex command \printorigdate.)

\mkbibquote   This is the standard biblatex command, which requires attention here because it is a crucial part of the mechanism of Lehman's "American" punctuation system. If you look in chicago-notes.cbx you'll see that the quoted fields, e.g., an article or incollection title, have this command in their formatting, which does most of the work for you. If, however, you need to provide additional quotation marks in a field — a quoted title within a title, for example — then you may need to use this command so that any following period or comma will be brought within the closing quotation marks. Its use is *required* when the quoted material comes at the end of a field, and I recommend always using it in your .bib database, as it does no harm even when that condition is not fulfilled. A few examples from notes-test.bib should help to clarify this.

In an article entry, the title contains a quoted phrase:

```
title = {Diethylstilbestrol and Media Coverage of the
    \mkbibquote{Morning After} Pill}
```

Here, because the quoted text doesn't come at the end of title, and no punctuation will ever need to be drawn within the closing quotation mark, you could instead use \enquote{Morning After} or even 'Morning After'. (Note the single quotation marks here — the other two methods have the virtue of taking care of nesting for you.) All of these will produce the formatted "Diethylstilbestrol and Media Coverage of the 'Morning After' Pill." Here, by contrast, is a book title:

```
title = {Annotations to \mkbibquote{Finnegans Wake}}
```

Because the quoted title within the title comes at the end of the field, and because this bibliographical unit will be separated from what follows by a period in the bibliography, then the \mkbibquote command is necessary to bring that period within the final quotation marks, like so: *Annotations to "Finnegans Wake."*

Let me also add that this command interacts well with Lehman's csquotes package, which I highly recommend, though the latter isn't strictly necessary in texts using an American style, to which biblatex defaults when csquotes isn't loaded.

\reprint   This and the following 7 macros all help biblatex-chicago-notes cope with the fact that many bibstrings in the Chicago system differ between notes and bibliography, the former sometimes using abbreviated forms when the latter prints them in full. In the current case, if a book is a reprint, then the macro \reprint, followed by a comma, should go in the location field before the city of publication (aristotle:metaphy:gr, schweitzer:bach). See **location**, above.

NB: The rules for employing abbreviated or full bibstrings in the *Manual* are remarkably complex, but I have attempted to make them as transparent for users as possible. In biblatex-chicago-notes, if you don't see it mentioned in this section, then in theory you should always provide an abbreviated version, using the \bibstring mechanism, if necessary (babb:peru). The standard biblatex

bibstrings should also work (palmatary:pottery), and any that won't should be covered by the series of macros beginning here with \reprint and ending below with \parttransandcomp.

\partcomp Since the *Manual* specifies that the strings editor, translator, and compiler all require different forms in notes and bibliography, and since it mentions these three apart from all the others biblatex provides (annotator, commentator, et al.), and further since it may indeed happen that the available fields (editor, namea, translator, nameb, and namec) aren't adequate for presenting some entries, I have provided 7 macros to allow you to print the correct strings for these functions in both notes and bibliography. Their names all begin with \part, as originally I intended them for use when a particular name applied only to a specific title, rather than to a maintitle or booktitle (cf. **namea** and **nameb**, above).

In the present instance, you can use \partcomp to identify a compiler when namec won't do, e.g., in a note field or the like. In such a case, biblatex-chicago-notes will print the appropriate string in your references.

\partedit Use this macro when identifying an editor whose name doesn't conveniently fit into the usual fields (editor or namea). (N.B.: If you are writing in French and using cms-french.lbx, then currently you'll need to add either de or d' after this command in your .bib files to make the references come out right. I'm working on this.) See chaucer:liferecords.

\partedit-andcomp As before, but for use when an editor is also a compiler.

\partedit-andtrans As before, but for when when an editor is also a translator (ratliff:review).

\partedit-transandcomp As before, but for when an editor is also a translator and a compiler.

\parttrans As before, but for use when identifying a translator whose name doesn't conveniently fit into the usual fields (translator and nameb).

\parttrans-andcomp As before, but for when a translator is also a compiler.

4.3.2 Citation Commands

The biblatex package is particularly rich in citation commands, some of which (e.g., \supercite(s), \citeyear) provide functionality that isn't really needed by the Chicago notes and bibliography style offered here. If you are getting unexpected behavior when using them please have a look in your .log file. A command like \textcite, listed in § 3.6.2 of the biblatex manual but not defined by biblatex-chicago, defaults to \cite, and leaves a warning in the .log. Others (e.g., \citeurl), though I haven't tested them extensively, should pretty much work out of the box. What remains are the commands I have found most useful and necessary for following the *Manual*'s specifications, and I document in this section any alterations I have made to these. As always, if there are standard commands that don't work for you, or new commands that would be useful, please let me know, and it should be possible to fix or add them.

A number of users have run into a problem that appears when they've used a command like \cite inside a \footnote macro. In this situation, the automatic capitalization routines will not be in operation at the start of the footnote, so instead of "Ibid.," for example, you'll see "ibid." If you need to use the \cite command within a \footnote command, the solution is to use \Cite instead. Alternatively, don't use a \footnote macro at all, rather try \footcite or \autocite with the optional prenote and postnote arguments. Cf. \Citetitle below, and also section 3.6 of biblatex.pdf.

\autocite I haven't adapted this in the slightest, but I thought it worth pointing out that biblatex-chicago-notes sets this command to use \footcite as the default option.

It is, in my experience, much the most common citation command you will use, and also works fine in its multicite form, **\autocites**.

\cite* While the \cite command works just as you would expect it to, I have also provided a starred version for the rare situations when you might need to turn off the ibidem tracking mechanism. Biblatex provides very sophisticated algorithms for using "Ibid" in notes, so in general you won't find a need for this command, but in case you'd prefer a longer citation where you might automatically find "Ibid," I've provided this. Of course, you'll need to put it inside a \footnote command manually. (See also section 4.4.3, below.)

\citeauthor I have adapted this standard biblatex command only very slightly to bring it into line with biblatex-chicago's needs. Its main usage will probably be for references to works from classical antiquity, when an author's name (abbreviated or not) sometimes suffices in the absence of a title, e.g., Thuc. 2.40.2–3 (17.252). You'll need to put it inside a \footnote command manually. (Cf. also entrysubtype in section 4.2, above.)

\citejournal This command provides an alternative short form when citing journal articles, giving the journaltitle and volume number instead of the article title after the author's name. The *Manual* suggests that this format might be helpful "in the absence of a full bibliography" (17.179).

\Citetitle This simply prepends \bibsentence to the usual \citetitle command. Some titles may need this for the automatic contextual capitalization facility to work correctly. (Included as standard from biblatex 0.8d.)

\citetitles Joseph Reagle noticed that, because of the way biblatex-chicago-notes formats titles in quotation marks, using the \citetitle command will often get you punctuation you don't want, especially when presenting a list of titles. I've included this multicite command to enable you to present such a list, if the need arises. Remember that you'll have to put it inside a \footnote command manually.

\footfullcite Another standard biblatex command, modified to work properly with biblatex-chicago-notes, and provided in case you find yourself in a situation where you really need the full citation in a footnote, but where \autocite would print a short note or even "Ibid." This may be particularly useful if you've chosen to use all short notes by setting the short option in the arguments to \usepackage{biblatex}, yet still feel the need for the occasional full citation.

\fullcite This, too, is a standard command, and it too provides a full citation, but unlike the previous command it doesn't automatically place it in a footnote. It may be useful within long textual notes.

\headlesscite Matthew Lundin requested a more generalized \headlesscite macro, suppressing the author's name in specific contexts while allowing users not to worry about whether a particular citation needs the long or short form, a responsibility thereby handed over to biblatex's tracking mechanisms. This citation command attempts to fulfill this request. Please note that, in the short form, the result will be rather like a \citetitle command, which may or may not be what you want. Note, also, that as I have provided only the most flexible form of the command, you'll have to wrap it in a \footnote yourself. Please see the next entry for further discussion of some of the needs this command might help address.

\headless-fullcite I have provided this command in case you want to print a full citation without the author's name. The *Manual* (17.31, 17.42) suggests this for brevity's sake in cases where that name is already obvious enough from the title, and where rep-

etition might seem awkward (creel:house, feydeau:farces, meredith:letters, and sewall:letter). Letter entries — and only such entries — do this for you automatically, and of course the repetition is tolerated in bibliographies for the sake of alphabetization, but in notes this command may help achieve greater elegance, even if it isn't strictly necessary. As I've provided only the most flexible form of the command, you'll have to wrap it in a \footnote yourself.

\shortcite I have provided this command in case, for any reason, you specifically require the short form of a note, and biblatex thinks you want something else. Again, I've provided only the most flexible form of the command, so you'll have to wrap it in a \footnote manually.

If you look at chicago-notes.cbx, you'll see a number of other citation commands, but those are intended for internal use only, mainly in cross-references of various sorts. Use at your own risk.

4.4 Package Options

4.4.1 Pre-Set biblatex Options

Although a quick glance through biblatex-chicago.sty will tell you which biblatex options the package sets for you, I thought I might gather them here also for your perusal. These settings are, I believe, consistent with the specification, but you can alter them in the options to biblatex-chicago in your preamble or by loading the package via \usepackage[style=chicago-notes]{biblatex}, which gives you the biblatex defaults unless you redefine them yourself inside the square brackets.

abbreviate= false
By default, biblatex-chicago-notes prints the longer bibstrings, mainly for use in the bibliography, but since notes require the shorter forms of many of them, I've had to define many new strings for use there.

autocite= footnote
Biblatex-chicago-notes places references in footnotes by default.

citetracker= true
The citetracker for the \ifciteseen test is enabled globally.

alldates=comp
The specification calls for the long format when presenting dates, slightly shortened when presenting date ranges.

dateabbrev= false
The *Manual* prefers full month names in the notes & bibliography style.

ibidtracker= constrict
This enables the use of "Ibid" in notes, but only in the most strictly-defined circumstances. Whenever there might be any ambiguity, biblatex should default to printing a more informative reference. Remember also that you can use the \cite* command to disable this functionality in any given reference, or indeed one of the fullcite commands if you need the long note form for any reason.

loccittracker =constrict
This allows the package to determine whether two consecutive citations of the same source also cite the same page of that source. In such a case, Ibid alone will be printed, without the page reference, following the specification (16.47).

maxbibnames =10 minbibnames =7
These two options are new, and control the number of names printed in the bibliography when that number exceeds 10. These numbers follow the recommendations of the *Manual* (17.29–30), and they are different from those for use in notes. With biblatex 1.6 and later you can no longer redefine maxnames and minnames in the \printbibliography command at the bottom of your document, so biblatex-chicago now does this automatically for you, though of course you can change them in your document preamble.

pagetracker= true
This enables page tracking for the \iffirstonpage and \ifsamepage commands for controlling, among other things, the printing of "Ibid." It tracks individual pages if LaTeX is in oneside mode, or whole spreads in twoside mode.

sortcase= false
This turns off the sorting of uppercase and lowercase letters separately, a practice which the *Manual* doesn't appear to recommend.

usetranslator =true
: This enables automatic use of the translator at the head of entries in the absence of an author or an editor. In the bibliography, the entry will be alphabetized by the translator's surname. You can disable this functionality on a per-entry basis by setting `usetranslator=false` in the options field. Cf. silver:gawain.

Other biblatex Formatting Options

I've chosen defaults for many of the general formatting commands provided by biblatex, including the vertical space between bibliography items and between items in the list of shorthands (`\bibitemsep` and `\lositemsep`). I define many of these in biblatex-chicago.sty, and of course you may want to redefine them to your own needs and tastes. It may be as well you know that the *Manual* does state a preference for two of the formatting options I've implemented by default: the 3-em dash as a replacement for repeated names in the bibliography (16.103–106); and the formatting of note numbers, both in the main text and at the bottom of the page / end of the essay (superscript in the text, in-line in the notes; 16.25). The code for this last formatting is also in biblatex-chicago.sty, and I've wrapped it in a test that disables it if you are using the memoir class, which I believe has its own commands for defining these parameters. You can also disable it by using the `footmarkoff` package option, on which see below.

4.4.2   Pre-Set chicago Options

bookpages= true
: At the request of Scot Becker, I have included this rather specialized option, which controls the printing of the pages field in book entries. Some bibliographic managers, apparently, place the total page count in that field by default, and this option allows you to stop the printing of this information in notes and bibliography. It defaults to true, which means the field is printed, but it can be set to false either in the preamble, for the whole document, or on a per-entry basis in the options field (though rather than use this latter method it would make sense to eliminate the pages field from the affected entries).

doi=true
: This option controls whether any doi fields present in the .bib file will be printed in notes and bibliography. It defaults to true, and can be set to false either in the preamble, for the whole document, or on a per-entry basis, in the options field.

isbn=true
: This option controls whether any isan, isbn, ismn, isrn, issn, and iswc fields present in the .bib file will be printed in notes and bibliography. It defaults to true, and can be set to false either in the preamble, for the whole document, or on a per-entry basis, in the options field.

numbermonth= true
: Once again at the request of Scot Becker, I have included this option, which controls the printing of the month field in all the periodical-type entries when a number field is also present. Some bibliographic software, apparently, always includes the month of publication even when a number is present. When all this information is available the *Manual* (17.181) prints everything, so this option defaults to true, which means the field is printed, but it can be set to false either in the preamble, for the whole document, or on a per-entry basis in the options field.

url=true
: This option controls whether any url fields present in the .bib file will be printed in notes and bibliography. It defaults to true, and can be set to false either in the preamble, for the whole document, or on a per-entry basis, in the options field. Please note that, as in standard biblatex, the url field is always printed in online entries, regardless of the state of this option.

includeall= true
: This is the one option that rules the five preceding, either printing all the fields under consideration — the default — or excluding all of them. It is set to `true` in chicago-notes.cbx, but you can change it either in the preamble for the whole document or in the options field of individual entries. The rationale for all of these options is the availability of bibliographic managers that helpfully present as much data as possible, in every entry, some of which may not be felt to be

entirely necessary. Setting `includeall` to `true` probably works just fine for those compiling their .bib databases by hand, but others may find that some automatic pruning helps clear things up, at least to a first approximation. Some per-entry work afterward may then polish up the details.

usecompiler=
true

This option enables automatic use of the name of the compiler (in the namec field) at the head of an entry, usually in the absence of an author, editor, or translator, in accordance with the specification (*Manual* 17.41). It may also, like `useauthor`, `useeditor`, and `usetranslator`, be disabled on a per-entry basis by setting `usecompiler=false` in the options field. Please remember that, because namec isn't a standard biblatex field, this name won't be part of its standard name algorithms, and that any entry headed by a namec will therefore need a shortauthor for short notes and a sortkey or the like in order to have it appear in the correct place in the bibliography. (The exception to this is when you modify the editor's identifying string using the editortype field, which is the procedure I recommend if the entry-heading compiler is only a compiler, and not also, e.g., an editor or a translator.)

4.4.3 Style Options – Preamble

These are parts of the specification that not everyone will wish to enable. All except the second can be used even if you load the package in the old way via a call to biblatex, but most users can just place the appropriate string(s) in the options to the `\usepackage{biblatex-chicago}` call in your preamble.

annotation

At the request of Emil Salim, I included in biblatex-chicago the ability to produce annotated bibliographies. If you turn this option on then the contents of your annotation (or annote) field will be printed after the bibliographical reference. (You can also use external files to store annotations – please see biblatex.pdf § 3.10.7 for details on how to do this.) This functionality is currently in a beta state, so before you use it please have a look at the documentation for the annotation field, on page 20 above.

footmarkoff

Although the *Manual* (16.25) recommends specific formatting for footnote (and endnote) marks, i.e., superscript in the text and in-line in foot- or endnotes, Charles Schaum has brought it to my attention that not all publishers follow this practice, even when requiring Chicago style. I have retained this formatting as the default setup, but if you include the `footmarkoff` option, biblatex-chicago-notes will not alter LaTeX's (or the endnote package's) defaults in any way, leaving you free to follow the specifications of your publisher. I have placed all of this code in biblatex-chicago.sty, so if you load the package with a call to biblatex instead, then once again footnote marks will revert to the LaTeX default, but of course you also lose a fair amount of other formatting, as well. See section 4.5.1, below.

juniorcomma

The *Manual* (6.49) states that "commas are no longer required around *Jr.* and *Sr.*," so by default biblatex-chicago has followed standard biblatex in using a simple space in names like "John Doe Jr." Charles Schaum has pointed out that traditional BibTeX practice was to include the comma, and since the *Manual* has no objections to this, I have provided an option which allows you to turn this behavior back on, either for the whole document or on a per-entry basis. Please note, first, that numerical suffixes (John Doe III) never take the comma. The code tests for this situation, and detects cardinal numbers well, but if you are using ordinals you may need to set this to `false` in the options field of some entries. Second, I have fixed a bug in older releases which always printed the "Jr." part of the name immediately after the surname, even when the surname came before the given names (as in a bibliography). The package now correctly puts the "Jr." part at the end, after the given names, and in this position it always takes a comma, the presence of which is unaffected by this option.

natbib

This may look like the standard biblatex option, but to keep the coding of biblatex-chicago.sty simpler for the moment I have reimplemented it there, from

whence it is merely passed on to biblatex. If you load the Chicago style with \usepackage{biblatex-chicago}, then the option should simply read natbib, rather than natbib=true. The shorter form also works if you load the style using \usepackage[style=chicago-notes]{biblatex}, so I hope this requirement isn't too onerous.

noibid At the request of an early tester, I have included this option to allow you globally to turn off the ibidem mechanism that biblatex-chicago-notes uses by default. Some publishers, it would appear, require this. Setting this option will mean that all possible instances of *ibid.* will be replaced by the short note form. For more fine-grained control of individual citations you'll probably want to use specialized citation commands, instead. See section 4.3.2.

short This option means that your text will only use the short note form, even in the first citation of a particular work. The *Manual* (16.3) recommends this space-saving format only when you provide a *full* bibliography, though even with such a bibliography you may feel it easier for your readers to present long first citations. If you do use the short option, remember that there are several citation commands which allow you to present the full reference in specific cases (see section 4.3.2). If your bibliography is not complete, then you should not use this option.

shorthandibid Chris Sparks pointed out that biblatex-chicago-notes would never use *ibid.* in the case of entries containing a shorthand field, but rather that consecutive references to such an entry continued to provide the shorthand, instead. The *Manual* isn't, as far as I can tell, completely clear on this question. In 17.252, discussing references to works from classical antiquity, it states that "when abbreviations are used, these rather than *ibid.* should be used in succeeding references to the same work," but I can't make out whether this rule is specific to classical references or has more general scope. Given this ambiguity, I don't think it unreasonable to provide an option to allow printing of *ibid.* instead of the short-hand in such circumstances, though the default behavior remains the same as it always has.

strict This still-experimental option attempts to follow the *Manual*'s recommendations (16.57) for formatting footnotes on the page, using no rule between them and the main text unless there is a run-on note, in which case a short rule intervenes to emphasize this continuation. I haven't tested this code very thoroughly, and it's possible that frequent use of floats might interfere with it. Let me know if it causes problems.

4.5 General Usage Hints

4.5.1 Loading the Style

With the addition of the author-date style to the package, I have provided two keys for choosing which style to load, notes and authordate, one of which you put in the options to the \usepackage command. The default way of loading the notes + bibliography style has therefore slightly changed. With early versions of biblatex-chicago-notes, the standard way of loading the package was via a call to biblatex, e.g.:

```
\usepackage[style=chicago-notes,strict,backend=bibtex8,%
babel=other,bibencoding=inputenc]{biblatex}
```

Now, the default way to load the style, and one that will in the vast majority of standard cases produce the same results as the old invocation, will look like this:

```
\usepackage[notes,strict,backend=bibtex8,babel=other,%
bibencoding=inputenc]{biblatex-chicago}
```

(In point of fact, the previous biblatex-chicago loading method without the notes option will still work, but only because I've made the notes & bibliography

style the default if no style is explicitly requested.) If you read through biblatex-chicago.sty, you'll see that it sets a number of biblatex options aimed at following the Chicago specification, as well as setting a few formatting variables intended as reasonable defaults (see section 4.4.1, above). Some parts of this specification, however, are plainly more "suggested" than "required," and indeed many publishers, while adopting the main skeleton of the Chicago style in citations, nonetheless maintain their own house styles to which the defaults I have provided do not conform.

If you only need to change one or two parameters, this can easily be done by putting different options in the call to biblatex-chicago or redefining other formatting variables in the preamble, thereby overriding the package defaults. If, however, you wish more substantially to alter the output of the package, perhaps to use it as a base for constructing another style altogether, then you may want to revert to the old style of invocation above. You'll lose all the definitions in biblatex-chicago.sty, including those to which I've already alluded and also the code that sets the note number in-line rather than superscript in endnotes or footnotes. Also in this file is the code that calls cms-american.lbx, which means that you'll lose all the Chicago-specific bibstrings I've defined unless you provide, in your preamble, a \DeclareLanguageMapping command adapted for your setup, on which see section 6 below and also §§ 4.9.1 and 4.11.7 in Lehman's biblatex.pdf.

What you *will not* lose is the ability to call the package options `annotation`, `strict`, `short`, and `noibid` (section 4.4.3, above), in case these continue to be useful to you when constructing your own modifications. There's very little code, therefore, actually in biblatex-chicago.sty, but I hope that even this minimal separation will make the package somewhat more adaptable. Any suggestions on this score are, of course, welcome.

4.5.2 Other Hints

One useful rule, when you are having difficulty creating a .bib entry, is to ask yourself whether all the information you are providing is strictly necessary. The Chicago specification is a very full one, but the *Manual* is actually, in many circumstances, fairly relaxed about how much of the data from a work's title page you need to fit into a reference. Authors of introductions and afterwords, multiple publishers in different countries, the real names of authors more commonly known under pseudonyms, all of these are candidates for exclusion if you aren't making specific reference to them, and if you judge that their inclusion won't be of particular interest to your readers. Of course, any data that may be of such interest, and especially any needed to identify and track down a reference, has to be present, but sometimes it pays to step back and reevaluate how much information you're providing. I've tried to make biblatex-chicago-notes robust enough to handle the most complex, data-rich citations, but there may be instances where you can save yourself some typing by keeping it simple.

Scot Becker has pointed out to me that the inverse problem not only exists but may well become increasingly common, to wit, .bib database entries generated by bibliographic managers which helpfully provide as much information as is available, including fields that users may well wish not to have printed (ISBN, URL, DOI, pagetotal, inter alia). The standard biblatex styles contain a series of options, detailed in biblatex.pdf §3.1.2.2, for controlling the printing of some of these fields, and with this release I have implemented the ones that are relevant to biblatex-chicago, along with a couple that Scot requested and that may be of more general usefulness. There is also a general option to excise with one command all the fields under consideration – please see section 4.4.2 above.

If you are having problems with the interaction of punctuation and quotation marks in notes or bibliography, first please check that you've used \mkbibquote in the relevant part of your .bib file. If you are still getting errors, please let me know, as it may well be a bug.

For the biblatex-chicago-notes style, I have fully adopted biblatex's system for providing punctuation at the end of entries. Several users noted insufficiencies in previous releases of biblatex-chicago, sometimes related to the semicolon between multiple citations, sometimes to ineradicable periods after long notes, bugs that were byproducts of my attempt to fix other end-of-entry errors. One of the side effects of this older code was (wrongly) to put a period after a long note produced, e.g., by a command like `\footnote{\headlessfullcite}`, whereas only the "foot" cite commands (including `\autocite` in the default biblatex-chicago-notes set up) should do so. If you came to rely on this side effect, please note now that you'll have to put the period in yourself when explicitly calling `\footnote`, like so: `\footnote{\headlessfullcite{key}.}`

When you use abbreviations at the ends of fields in your .bib file (e.g., "`n.d.`" or "`Inc.,`") biblatex-chicago-notes should deal automatically with adding (or suppressing) appropriate punctuation after the final dot. This includes retaining periods after such dots when a closing parenthesis intervenes, as in (n.d.). Merely entering the abbreviation without informing biblatex that the final dot is a dot and not a period should always work, though you do have to provide manual formatting in those rare cases when you need a comma after the author's initials in a bibliography, usually in a misc entry (see house:papers). If you find you need to provide such formatting elsewhere, please let me know.

Finally, allow me to reiterate what Philipp Lehman says in biblatex.pdf, to wit, use bibtex8, rather than standard BibTEX, and avoid the cryptic errors that ensue when your .bib file gets to a certain size.

5 The Specification: Author-Date

In what follows, I attempt to explain all the parts of biblatex-chicago-authordate that might be considered somehow "non standard," at least with respect to the styles included with biblatex itself, though in the section on entry fields I have also duplicated a lot of the information in biblatex.pdf, which I hope won't badly annoy expert users of the system. Headings in green indicate material new to this release, or occasionally old material that has undergone significant revision. Numbers in parentheses refer to sections of the *Chicago Manual of Style*, 15th edition. The file dates-test.bib contains many examples from the *Manual* which, when processed using biblatex-chicago-authordate, should produce the same output as you see in the *Manual* itself, or at least compliant output, where the specifications are vague or open to interpretation, a state of affairs which does sometimes occur. I have provided cms-dates-sample.pdf, which shows how my system processes dates-test.bib, and I have also included the reference keys from the latter file below in parentheses.

New in this release

5.1 Entry Types

The complete list of entry types currently available in biblatex-chicago-authordate, minus the odd biblatex alias, is as follows: **article**, **artwork**, **audio**, **book**, **bookinbook**, **booklet**, **collection**, **customc**, **image**, **inbook**, **incollection**, **inproceedings**, **inreference**, letter, **manual**, misc, **music**, **online** (with its alias **www**), **patent**, **periodical**, **proceedings**, **reference**, **report** (with its alias **techreport**), **review**, **suppbook**, **suppcollection**, **suppperiodical**, **thesis** (with its aliases **mastersthesis** and **phdthesis**), **unpublished**, and **video**.

What follows is an attempt to specify all the differences between these types and the standard provided by biblatex. If an entry type isn't discussed here, then it is safe to assume that it works as it does in the standard styles. In general, I have attempted not to discuss specific entry fields here, unless such a field is crucial to the overall operation of a given entry type. As a general and important rule, most entry types require very few fields when you use biblatex-chicago-authordate, so it seemed to me better to gather information pertaining to fields in the next section.

article The *Chicago Manual of Style* (17.148) recognizes three different sorts of periodical publication, "journals," "magazines," and "newspapers." The first (17.150) includes "scholarly or professional periodicals available mainly by subscription," while the second refers to "weekly or monthly" publications that are "available either by subscription or in individual issues at bookstores or newsstands." "Magazines" will tend to be "more accessible to general readers," and typically won't have a volume number.

Now, for articles in "journals" you can simply use the traditional BibTeX — and indeed biblatex — article entry type, which will work as expected and set off the page numbers with a colon in the list of references, as required by the *Manual*. If, however, you need to refer to a "magazine" or a "newspaper," then you need to add an entrysubtype field containing the exact string `magazine`. The main formatting differences between a `magazine` (which includes both "magazines" and "newspapers") and a plain article are that time specifications (month, day, season) aren't placed within parentheses, and that page numbers are set off by a comma rather than a colon. Otherwise, the two sorts of reference have much in common. (For article, see *Manual* 17.154–181; batson, beattie:crime, chu:panda, connell:chronic, conway:evolution, friedman:learning, garaud:gatine, garrett:15, hlatky:hrt, kern, lewis:15, loften:hamlet, loomis:structure:15, rozner:liberation, schneider:mittelpleistozaene, terborgh:preservation, wall:radio, white:callimachus. With entrysubtype `magazine`, cf. 17.166, 17.182–198; assocpress:gun, lakeforester:pushcarts, morgenson:market, reaves:rosen, stenger:privacy.)

The *Manual* suggests that "a list of works cited need not list newspaper items if these have been documented in the text" (17.191). This involves giving the title of the journal and the full date of publication in a parenthetical reference, including any other information in the main text, thereby obviating the need to present such an entry in the list of references. To utilize this method in the author-date style, in addition to a `magazine` entrysubtype, you'll need to place `cmsdate=full` into the options field, including `skipbib` there as well to stop the entry printing in the list of references. If the entry only contains a date and journaltitle that's enough, but if it's a fuller entry also containing an author then you'll also need `useauthor=false` in the options field. Other surplus fields will be ignored.

If you are familiar with the notes & bibliography style, you'll know that the *Manual* treats reviews (of books, plays, performances, etc.) as a sort of recognizable subset of "journals," "magazines," and "newspapers," distinguished mainly by the way one formats the title of the review itself. In the author-date style, however, since both a generic title like "review of . . . " and a specific one (cf. gibbard:15; osborne:poison:15) are formatted in the same way (no quotation marks or italics, sentence-style capitalization), all you really need, conveniently, is the article type, with the entrysubtype toggle to distinguish the sort of periodical which contains the review.

In the case of a review with a specific as well as a generic title, the former goes in the title field, and the latter in the titleaddon field. Standard biblatex intends this field for use with additions to titles that may need to be formatted differently from the titles themselves, and biblatex-chicago-authordate uses it in just this way, with the additional wrinkle that it can, if needed, replace the title entirely, and this in, effectively, any entry type, providing a fairly powerful, if somewhat complicated, tool for getting BibTeX to do what you want. Here, however, if all you need is a generic title like "review of . . . ," then you can simply use the title field for it, ignoring titleaddon.

No less than seven more things need explication under this heading. First, since the *Manual* specifies, for the author-date style, that what goes into the title or the titleaddon fields of article entries stays unformatted — no italics, no quotation marks — this plain style (with sentence-style capitalization, as usual) is the default for such text, which means that you'll have to format any titles within these fields yourself, e.g., with `\mkbibemph{}`. Second, the *Manual* specifies a

similar plain style for the titles of other sorts of material found in "magazines" and "newspapers," e.g., obituaries, letters to the editor, interviews, the names of regular columns, and the like, though the names of regular columns, please note, need to be capitalized headline style. References may contain both the title of an individual article and the name of the regular column, in which case the former should go, as usual, in a title field, and the latter in titleaddon. (See 17.188, 17.190, 17.193; morgenson:market, reaves:rosen.)

Third, the *Manual* suggests that "unsigned newspaper articles or features are best dealt with in text or notes. But if a … reference-list entry should be needed, the name of the newspaper stands in place of the author" (17.192). It doesn't always carry through on this in its own presentation of newspaper citations (see esp. 17.188), but I've implemented their recommendation nonetheless, which means that in an article (or a review) entry, entrysubtype magazine, and only in such an entry, a missing author field results in the name of the periodical (in the journaltitle field) being used as the missing author. You can also place `cmsdate=full` and `skipbib` into the options field to produce an augmented in-text citation whilst keeping this material out of the reference list. If the citation does appear in the reference list, the new default sorting scheme in biblatex-chicago-authordate means that you no longer need the sortkey field to alphabetize by journaltitle instead of title, though you will still need one if you retain the definite or indefinite article at the beginning of the journaltitle. Also, if you want to abbreviate the journaltitle for use in citations, then the shortauthor field, somewhat surprisingly, is the place for it. (See section 5.4.1, below; lakeforester:pushcarts, nyt:trevorobit, unsigned:ranke.)

Fourth, in certain fields, just beginning your data with a lowercase letter activates the mechanism for capitalizing that letter depending on its context within a list of references entry. This is less important in the author-date style, where this information only turns up in the reference list and not in citations, but you can consult **\autocap** below for all the details. Both the titleaddon and note fields are among those treating their data this way, and since both appear regularly in article entries, I thought the problem merited a preliminary mention here.

Fifth, if you need to cite an entire issue of any sort of periodical, rather than one article in an issue, then the periodical entry type, once again with or without the magazine toggle in entrysubtype, is what you'll need. (You can also use the article type, placing what would normally be the issuetitle in the title field and retaining the usual journaltitle field, but this arrangement isn't compatible with standard biblatex.) The note field is where you place something like "special issue" (with the small "s" enabling the automatic capitalization routines), whether you are citing one article or the whole issue (conley:fifthgrade, good:wholeissue). Indeed, this is a somewhat specialized use of note, and if you have other sorts of information you need to include in an article or periodical entry, then you shouldn't put it in the note field, but rather in titleaddon or perhaps addendum (brown:bremer).

Sixth, I would suggest that if you wish to cite a television or radio broadcast, the article type, entrysubtype magazine is the place for it. The name of the program would go in journaltitle, with the name of the episode in title. The network's name goes into the usera field. (8.196, 17.207; see bundy:macneil for an example of how this all might look in a .bib file.)

Finally, if you're planning to use the same .bib file for the author-date and for the notes & bibliography style, you may need to look under the article and review entries in section 4.1 above for the full instructions on their differences. Any well-constructed review entry will work just fine under author-date, but if you only need the author-date style then you can avoid the complexity of learning another entry type.

If you're still with me, allow me to recommend that you browse through datestest.bib to get a feel for just how many of the *Manual*'s complexities the article

and periodical types attempt to address. It may be that in future releases of biblatex-chicago I'll be able to simplify these procedures somewhat, but if you are only using author-date at least you've avoided some of the worst of it.

artwork Arne Kjell Vikhagen has pointed out to me that none of the standard entry types were straightforwardly adaptable when referring to visual artworks. The *Manual* doesn't give any thorough specifications for such references, and indeed it's unclear that it believes it necessary to include them in the reference apparatus at all. Still, it's easy to conceive of contexts in which a list of artworks studied might be desirable, and biblatex includes entry types for just this purpose, though the standard styles leave them undefined. The two I have adopted are artwork and image, the former intended for paintings, sculptures, etchings, and the like, the latter for photographs. The two entry types work in exactly the same way as far as constructing your .bib entry, and when printed the only difference will be that the titles of artworks are italicized, those of images in plain text.

As one might expect, the artist goes in author and the name of the work in title. The type field is intended for the medium — e.g., oil on canvas, charcoal on paper — and the version field might contain the state of an etching. You can place the dimensions of the work in note, and the current location in organization, institution, and/or location, in ascending order of generality. The type field, as in several other entry types, uses biblatex's automatic capitalization routines, so if the first word only needs a capital letter at the beginning of a sentence, use lowercase in the .bib file and let biblatex handle it for you. (See *Manual* 12.33; leo:madonna, bedford:photo.)

As a final complication, the *Manual* (8.206) says that "the names of works of antiquity … are usually set in roman." If you should need to include such a work in the reference apparatus, you can either define an entrysubtype for an artwork entry — anything will do — or you could use the image type, or you could try the misc entry type with an entrysubtype. Fortunately, in this instance the other fields in a misc entry function pretty much as in artwork or image.

audio For this release of biblatex-chicago, following the request of Johan Nordstrom, I have included three new entry types, all undefined by the standard styles, designed to allow users to present audiovisual sources in accordance with the Chicago specifications. The *Manual's* presentation of such sources (17.263–273), though admirably brief, seems to me somewhat inconsistent. I attempted to condense all the requirements into two new entry types, but ended up relying on three, the differences between which I shall attempt to delineate here. There are likely to be occasions when your choice of entry type is not obvious, but at the very least biblatex-chicago should help you maintain consistency. For users of the author-date style, it is as well to note here that the *Manual* (17.265) suggests that "such materials are best mentioned in running text and grouped in the reference list under a subhead," a suggestion you may wish to follow, particularly if your audiovisual entries don't typically contain the information — author and date — needed to produce a parseable parenthetical citation.

The **music** type is intended for all musical recordings that do not have a video component. This means, for example, digital media (whether on CD or hard drive), vinyl records, and tapes. The **video** type includes (nearly) all visual media, whether it be films, TV shows, tapes and DVDs of the preceding or of any sort of performance (including music), or online multimedia. Finally, the **audio** type, our current concern, fills gaps in the two others, and presents its sources in a more "book-like" manner. Published musical scores need this type — unpublished ones would use misc with an entrysubtype (shapey:partita:15) — as do such favorite educational formats as the slideshow and the filmstrip (greek:filmstrip:15, schubert:muellerin, verdi:corsaro). The *Manual* (17.269–270) sometimes uses a similar format for audio books and even for films (twain:audio, weed:flatiron), though elsewhere these sorts of material are presented as music

and video, respectively. It would appear to depend on which sorts of publication facts you wish to present — cf. *Manual* 17.269.

Once you've accepted the analogy of composer to author, constructing an audio entry should be fairly straightforward, since many of the fields function just as they do in book or inbook entries. Indeed, please note that I compare it to both these other types as, in common with the other audiovisual types, audio has to do double duty as an analogue for both books and collections, so while there will normally be an author, a title, a publisher, a date, and a location, there may also be a booktitle and/or a maintitle — see schubert:muellerin for an entry that uses all three in citing one song from a cycle. If the medium in question needs specifying, the type field is the place for it. (It is characteristic of this entry type that such information is placed after the publisher information, whereas in the other audiovisual types their order is reversed.) Finally, the titleaddon field can specify functions for which biblatex-chicago provides no automated handling, e.g., a librettist (verdi:corsaro).

bookinbook This type provides the means of referring to parts of books that are considered, in other contexts, themselves to be books, rather than chapters, essays, or articles. (Older versions of biblatex-chicago used **customb** for this purpose, but this is now deprecated.) Such an entry can have a title and a maintitle, but it can also contain a booktitle, all three of which will be italicized in the reference matter. In general usage it is, therefore, rather like the traditional inbook type, only with its title in italics rather than in plain text. (See *Manual* 17.72, 17.89, 17.93; bernard:boris, euripides:orestes, plato:republic:gr.)

NB: The Euripides play receives slightly different presentations in 17.89 and 17.93. Although the specification is very detailed, it doesn't eliminate all choice or variation. Using a system like BɪʙTᴇX should help to maintain consistency.

booklet This is the first of two entry types — the other being manual, on which see below — which are traditional in BɪʙTᴇX styles, but which the *Manual* (17.241) suggests may well be treated basically as books. In the interests of backward compatibility, biblatex-chicago-authordate will so format such an entry, which uses the howpublished field instead of a standard publisher, though of course if you do decide just to use a book entry then any information you might have given in a howpublished field should instead go in publisher. (See clark:mesopot.)

customa This entry type is now obsolete, and any such entries in your .bib file will trigger an error. Please use the standard biblatex **letter** type instead.

customb This entry type is now obsolete, and any such entries in your .bib file will trigger an error. Please use the standard biblatex **bookinbook** type instead.

customc This entry type has undergone a metamorphosis with this release, as I previously warned both here and in the RELEASE file. Rather than being a (deprecated) alias of the standard biblatex **suppbook**, it now allows you to include the expansions of abbreviations and shorthands *inside* the list of references itself, as recommended by the *Manual* (17.47), rather than in the list of shorthands.

In its simplest form, you need merely place the abbreviation of the (often institutional) author's name into the author field, and its expansion into the title field. To make sure it appears in the list of references, you can either manually include the entry key in a \nocite command, or you can put that entry key in the userc field in the main .bib entry, in which case biblatex-chicago-authordate will print the expanded abbreviation if and only if you cite the main entry. (See abbrev:BSI, abbrev:ISO, bsi:abbreviation:15, iso:electrodoc:15.) Under ordinary circumstances, biblatex-chicago will connect the abbreviation and its expansion with the word "*See*" — or its equivalent in the document's language — in italics. If you wish to present the cross-reference differently, you can put the connecting word(s) into the nameaddon field.

I haven't disabled in any way the mechanisms biblatex uses to produce the list of shorthands, so the \printshorthands command will still print that list in your document. Judicious use of skiplos in the options field will therefore enable simultaneous use of several methods of shorthand presentation, if that is useful. It may be as well to mention here that the *Manual* (17.39–40) offers other uses for this alphabetized cross-referencing system in reference lists, which may also prove helpful for the author-date style. See the discussion of customc in section 4.1 of the notes & bibliography docs, above.

Finally, you may need to use this entry type if you wish to include a comment inside the parentheses of a citation, as specified by the *Manual* (16.111). If you have a postnote, then you can manually provide the punctuation and comment there, e.g., \autocite[4; the unrevised trans.]{stendhal:parma}. Without a postnote, you'll need a separate misc or customc entry containing just the text of the comment in the title field, entrysubtype classical, and options skipbib. An \autocites command calling both the main text and the comment will do the trick, e.g., \autocites{chicago:manual:15}{chicago:comment}.

image This entry type, left undefined in the standard styles, is in biblatex-chicago-authordate intended for referring to photographs. Excluding the possible use of the entrysubtype field, which in an image entry would be ignored, this type is a clone of artwork, so you should consult the latter's documentation above to see how to construct your .bib entry. (See *Manual* 12.33; bedford:photo.)

inbook These two standard biblatex types have very nearly identical formatting require-
incollection ments as far as the Chicago specification is concerned, but I have retained both of them for compatibility. Biblatex.pdf (§ 2.1.1) intends the first for "a part of a book which forms a self-contained unit with its own title," while the second would hold "a contribution to a collection which forms a self-contained unit with a distinct author and its own title." The title of both sorts will be in plain text, and in general you can use either type for most material falling into these categories. There is, however, an important difference between them, as it is only in incollection entries that I implement the *Manual's* recommendations for space-saving abbreviations in the list of references when you cite multiple pieces from the same collection. These abbreviations are activated when you use the crossref or xref field in incollection entries, and not in inbook entries, mainly because the *Manual* (17.70) here specifies a "multiauthor book." (For more on this mechanism see **crossref**, below, and note that it is also active in letter and inproceedings entries. There is, of course, nothing to prevent you from using the mechanism when referring to, e.g., chapters from a single-author book, but you'll have to use incollection instead of inbook.) If the part of a book to which you are referring has had a separate publishing history as a book in its own right, then you may wish to use the bookinbook type, instead, on which see above. (See *Manual* 17.68–72; inbook: ashbrook:brain, phibbs:diary, will:cohere; incollection: centinel:letters, contrib:contrib, sirosh:visualcortex; el-let:galena, keating:dearborn, and lippincott:chicago [and the collection entry prairie:state] demonstrate the use of the crossref field with its attendant abbreviations in the list of references.)

NB: The *Manual* suggests that, when referring to a chapter, one use either a chapter number or the inclusive page numbers, not both. In-text citations, of course, require any postnote field to specify if it is a whole chapter to which you are referring.

inproceedings This entry type works pretty much as in standard biblatex. Indeed, the main differences between it and incollection are the lack of an edition field and the possibility that an organization may be cited alongside the publisher, even though the *Manual* doesn't specify its use (17.71). Please note, also, that the crossref and xref mechanism for shortening citations of multiple pieces from the same proceedings is operative here, just as it is in incollection entries. See **crossref**, below, for more details.

inreference This entry type is aliased to incollection in the standard styles, but the *Manual's* requirements for the notes & bibliography style prompted a thoroughgoing revision. Unfortunately, instructions for the author-date style are considerably less copious, so parts of what follows are my best guess at following the specification (17.238–239).

One thing, at least, seems clear. If your reference work can easily or conveniently be presented like a regular book, that is, with an author or editor, a year of publication, and a title, and if you you will be citing it by page or section number, then you should almost certainly simply choose the book entry type for your .bib entry. (Cf. mla:style, schellinger:novel, times:guide. The latter was presented as an inreference entry for the notes & bibliography style, but because the book entry type can also present references to alphabetized headings [see below], at least in the list of references, then it seemed better just to choose a book entry for the author-date style.)

If you simply cannot make your source fit the template for a book, then you may need to use the inreference type, the main feature of which is the lista field, which you use to present citations from "alphabetically arranged" works by named article rather than by page number. You should present these article names just as they appear in the work, separated by the keyword "and" if there is more than one, and biblatex-chicago-authordate will provide the appropriate prefatory string (s.v., plural s.vv.), and enclose each in its own set of quotation marks (times:guide). More relevant to the author-date style is the fact that the postnote field works the same way in inreference entries, the only limitation on this system being that this field, unlike lista, is not a list, and therefore for the formatting to work correctly you can only put one article name in it. In the case of "[w]ell-known reference books, such as major dictionaries and encyclopedias," you are encouraged not to include them in the list of references, so the lista field actually may be of less use than this special formatting of postnote. You may want to look at ency:britannica, where only a (carefully-formatted) shorttitle and an options field are necessary to allow you to produce in-text citations that look like (*Ency. Brit.* 15th ed., s.v. "Article").

If it seems appropriate to include such a work in the list of references, perhaps because the work is not so well known that a short citation will be parseable by your readers, or perhaps because it is an online work, which requires you to provide a urldate (see below), be aware that the contents of the lista field will also be presented there, which may not be what you want. A separate inreference or reference entry might solve this problem, but you may also need a sortkey field to ensure proper alphabetization, as biblatex will attempt to use an editor or author name, if either is present. In a typical inreference entry, very few fields are needed, as "the facts of publication are often omitted, but the edition (if not the first) must be specified." In practice, this means a title and possibly an edition field. The author field holds the author of the specific article (in lista), not the author of the title as a whole. This name will be printed in parentheses after the entry's name (grove:sibelius).

All of these rules apply to online reference works, as well, for which you need to provide not only a url but also, always, a urldate, as these sources are in constant flux (wikiped:bibtex, grove:sibelius). For author-date, it may be convenient to duplicate the urlyear in the year, as this will help to present and categorize the material both in citations and in the list of references. Please note, however, that the automatic provision of the "n.d." abbreviation when a year is missing has been turned off for inreference entries, as for misc and reference entries.

Some of these presentational difficulties might make switching between the two Chicago styles rather more difficult, depending on the nature of your sources. The advice I offer in section 7 below may be of assistance.

letter This entry type was designed to be used for citing letters, memoranda, or similar texts, but *only* when they appear in a published collection. (Unpublished

material of this nature needs a misc entry, for which see below.) The author-date specification (17.77), however, recommends against individual letters appearing in a list of references, suggesting instead that you put the whole published collection in a book entry and use a notice in the text to specify the letter (white:total).

If you absolutely must include individual letters in the list of references, for whatever reason, then the instructions above for the notes & bibliography style in section 4.1, s.v. "letter," should get you started. There are a few wrinkles, related to date specifications, that I shall attempt to clarify here. If you look at white:ross:memo and white:russ, you'll see two letters from the same published collection, both written in the same year. You can now simply use the origdate field in both of them, because in the absence of a date (or an eventdate) Biber and biblatex will use the origyear as the labelyear, putting it at the head of the entry and in the citation, and also ensuring that the letters a,b,c are appended to disambiguate the two sources. You no longer need anything in the options field at all, thanks to the way \DeclareLabelyear works through the possibilities and finds a date to head the entry. In this case, it works because we are using the xref mechanism to refer to the whole published collection (white:total), so a separate citation of that entry provides the date for the shortened cross-reference included in the list of references, and the letter entry never sees that date at all.

If this all seems clear as mud, I'm not surprised, but let me suggest that you experiment with the different date settings to see what kinds of effects they have on the final result, and also read the documentation of the date field in section 5.2 below.

manual This is the second of two traditional BIBTEX entry types that the *Manual* suggests formatting as books, the other being booklet. As with this latter, I have retained it in biblatex-chicago-authordate for backward compatibility, its main peculiarity being that, in the absence of a named author, the organization producing the manual will be provided both as author and as publisher. (You can give a shortened form of the organization in the shortauthor field for text citations, if needed.) Of course, if you were to use a book entry for such a reference, then you would need to define both author and publisher using the name you here might have put in organization. (See 17:47; chicago:manual:15, dyna:browser, natrecoff:camera.)

misc As its name suggests, the misc entry type was designed as a hold-all for citations that didn't quite fit into other categories. In biblatex-chicago, I have somewhat extended its applicability, while retaining its traditional use. Put simply, with no entrysubtype field, a misc entry will retain backward compatibility with the standard styles, so the usual howpublished, version, and type fields are all available for specifying an otherwise unclassifiable text, and the title will be italicized. (The *Manual*, you may wish to note, doesn't give specific instructions on how such citations should be formatted, so when using the Chicago style I would recommend you have recourse to this traditional entry type as sparingly as possible.)

If you do provide an entrysubtype field, the misc type provides a means for citing unpublished letters, memoranda, private contracts, wills, interviews, and the like, making it something of an unpublished analogue to the letter and article entry types (which see). Typically, such an entry will cite part of an archive, and equally typically the text cited won't have a specific title, but only a generic one, whereas an unpublished entry will ordinarily have a specific author and title, and won't come from a named archive. As a rule, and as with the letter type, the *Manual* (17.233) suggests that the list of references will usually contain only the name of the whole archived collection, with more specific information about individual items provided in the text, "outside the parentheses." If, on the other hand, "only one item from a collection has been mentioned in text, the entry may begin with the writer's name (if known)." (See 17.205-206, 17.220, 17.222-

232; house:papers cites a whole archive, while creel:house, dinkel:agassiz, and spock:interview cite individual pieces.)

As far as constructing your .bib entry goes, you should first know that, like the inreference and reference types, the absence of any date will not result in the "n.d." abbreviation automatically being provided. As for presenting the date, the *Manual* draws a distinction between archival material that is "letter-like" (letters, memoranda, reports, telegrams) and that which isn't (interviews, wills, contracts, or even personal communications you've received and which you wish to cite). This may not always be the easiest distinction to draw, and in previous releases of biblatex-chicago I have been ignoring it, but once you've decided to classify it one way or the other you put the date in the origdate field for letters, etc. (creel:house), and into the date field for the others (spock:interview). Like with the letter type, if the only date present is an origdate, you no longer need to set the cmsdate option in your .bib entry to make sure that that year appears at the head of the entry (and in citations) — this now happens automatically. (Cf. particularly the documentation in section 5.2 below, s.v. "date", and also the letter type above for some of the date-related complications that can arise, and how you can address them with judicious use of the options, date, and origdate fields.)

As in letter entries, the titles of unpublished letters are of the form `Author to Recipient`, further information can be given in the titleaddon field, while the origlocation field can hold the place where the letter was written. Interviews or similar pieces will have a different sort of title, but all types will use the note, organization, institution, and location fields (in ascending order of generality) to identify the archive, though the *Manual* specifies (17.228) that well-known depositories don't usually need a city, state or country specified. (The traditional misc fields are all still available, also.)

When your .bib entry refers to an entire archived collection, then you may wish to use the word "classical" as your entrysubtype, which will have no effect on the list of references but will change the look of the in-text citations (house:papers). Instead of any date, the citation will include the title, separated from the author's name by a space, e.g., (House Papers). This same arrangement, happily, allows you easily to cite individual books of the Bible, and also certain other sacred texts (17.246–49; genesis). Please see under entrysubtype in section 5.2 below for all the details of the classical toggle.

In all this class of archived material, the *Manual* (17.222) quite specifically requires more consistency within your own work than conformity to some external standard, so it is the former which you should pursue. I hope that biblatex-chicago proves helpful in this regard.

music This is one of three new audiovisual entry types, and is intended primarily to aid in the presentation of musical recordings that do not have a video component, though it can also include audio books (auden:reading:15). A DVD or VHS of an opera or other performance, by contrast, should use the **video** type instead (handel:messiah:15). Because biblatex — and BibTeX before it — were designed primarily for citing book-like objects, some choices needed to be made in assigning the various roles found on the back of a CD to the fields in a typical .bib entry. I have also implemented several new bibstrings to help in identifying these roles within entries. If you can think of a simpler way to distribute the roles, please let me know, so that I can consider making changes before anyone gets used to the current equivalences.

These equivalences, in summary form, are:

author = composer, songwriter, or performer(s), depending on whom you wish to emphasize by placing them at the head of the entry.

editor, editora, editorb = conductor, director or performer(s). These will ordinarily follow the title of the work, though the usual useauthor and

`useeditor` options can alter the presentation within an entry. Because these are non-standard roles, you will need to identify them using the following:

editortype, editoratype, editorbtype: The most common roles, all associated with specific bibstrings (or their absence), will be `conductor`, `director`, `producer`, and, oddly, `none`. The last is particularly useful when identifying the group performing a piece, as it usually doesn't need further specifying and this role prevents biblatex from falling back on the default `editor` bibstring.

title, booktitle, maintitle: As with the other audiovisual types, music serves as an analogue both to books and to collections, so the title will either be, e.g., the album title or a song title, in which latter case the album title would go into booktitle. The maintitle might be necessary for something like a box set of *Complete Symphonies*.

series, number: These two are closely associated, and are intended for presenting the catalog information provided by the music publisher, especially in the case when a publisher oversees more than one label. In nytrumpet:art:15, for example, the series field holds the label (`Vox/Turn-about`) and the number field the catalog number (`PVT 7183`). You can certainly put all of this information into one of the above fields, but separating it may help make the .bib entry more readable.

howpublished/pubstate: The *Manual* (17.268) follows the rather specialized requirements for presenting publishing information for musical recordings. The normal symbol for musical copyright is ℗ (Unicode point u+2117, SOUND RECORDING COPYRIGHT), but other copyrights © are often also asserted. The howpublished field is the place for these symbols, and it may also have to hold a year designation if the ℗ and the © apply to different years, as sometimes happens. In keeping with its general usage in the author-date style, but also recognizing the peculiarities of this entry type, I have made the pubstate field a synonym for howpublished. Please choose only one of them per entry, and remember that the automatic presentation of reprints via the pubstate field is disabled in music entries. (See nytrumpet:art:15.)

date, publisher: Ordinarily, you can use a combination of the date and origdate fields, along with the `cmsdate` entry option, to present the various dates of publication and republication of a work. This will mostly still work in music entries, but, as I just pointed out, the automatic presentation of reprints via the pubstate field has been turned off, as it doesn't provide a good fit for the materials at hand. Instead, the howpublished or pubstate field can be used manually to present the publishing complexities, including year information that won't be placed at the head of an entry. Any year data you do wish placed there needs to go in date or origdate, as usual. Thankfully, the publisher field itself is self-explanatory.

type: As in all the audiovisual entry types, the type field holds the medium of the recording, e.g., vinyl, 33 rpm, 8-track tape, cassette, compact disc, mp3, ogg vorbis.

I should also note here that I have implemented the standard biblatex **eventdate** field, in case you need it to identify a particular recording session or concert. It will be printed just after the title. The entries in dates-test.bib should at least give you a good idea of how this all works, and that file also contains an example of an audio book presented in a music entry. If you browse the examples in the *Manual* you will see that no author-date examples are given, so I have generally adopted the formatting decisions I made for the notes & bibliography style. Arguments as to why I'm wrong will, of course, be entertained. (Cf. 17.268; auden:reading:15, beethoven:sonata29, bernstein:shostakovich, nytrumpet:art:15.)

online   The *Manual*'s instructions (17.142–147, 17.198, 17.234–237) for citing online materials are slightly different from those suggested by standard biblatex. Indeed, this is a case where complete backward compatibility with other biblatex styles may be impossible, because as a general rule the *Manual* considers relevant not only where a source is found, but also the nature of that source, e.g., if it's an online edition of a book (james:ambassadors), then it calls for a book entry. Even if you cite an "intrinsically online" source, if that source is structured more or less like a conventional printed periodical, then you'll probably want to use article or review instead of online (stenger:privacy, which cites *CNN.com — Yahoo! News* is another example that would be treated in such a way). If the "standard facts of publication" are missing, then the online type is usually the best choice (evanston:library, powell:email). Some online materials will, no doubt, make it difficult to choose an entry type, but so long as all locating information is present, then perhaps that is enough to fulfill the specification, or at least so I'd like to hope.

Constructing an online .bib file entry is much the same as in biblatex. The title field would contain the title of the page, the organization field could hold the title or owner of the whole site. If there is no specific title for a page, but only a generic one (powell:email), then in the author-date style the title will serve just as well as titleaddon, which latter is required for the notes & bibliography style.

patent   The *Manual* is very brief on the subject of patents (17.219), but very clear about which information it wants you to present, so such entries may not work well with other biblatex styles. The important date, as far as Chicago is concerned, is the filing date. If a patent has been filed but not yet granted, then you can place the filing date in either the date field or the origdate field, and biblatex-chicago-authordate will automatically prepend the bibstring `patentfiled` to it. If the patent has been granted, then you put the filing date in the origdate field, and you put the date it was issued in the date field, to which the bibstring `patentissued` will automatically be prepended. In this entry type, and in no other, the `cmsdate=on` option is turned on by default, so that the filing date will be at the head of the entry in the list of references and in the citation, as well. If you have more than one patent by the same author(s) filed in the same year, and if one or both of them have also been granted, then you'll need to reverse the dates (or put `switchdates` in the options field) so that "a,b,c" etc. can be appended to the year. (If there is just the one, filing, date, please don't use the `switchdates` option.) The patent number goes in the number field, and you should use the standard biblatex bibstrings in the type field. Though it isn't mentioned by the *Manual*, biblatex-chicago-authordate will print the holder after the author, if you provide one. See petroff:impurity.

periodical   This is the standard biblatex entry type for presenting an entire issue of a periodical, rather than one article within it. It has the same function in biblatex-chicago, and in the main uses the same fields, though in keeping with the system established in the article entry type (which see) you'll need to provide entrysubtype `magazine` if the periodical you are citing is a "newspaper" or "magazine" instead of a "journal." Also, remember that the note field is the place for identifying strings like "special issue," with its initial lowercase letter to activate the automatic capitalization routines, though this isn't strictly necessary in the author-date style. (See *Manual* 17.170; good:wholeissue.)

reference   This entry type is aliased to collection by the standard biblatex styles, but I intend it to be used in cases where you need to cite a reference work but not an alphabetized article or articles in that work. This could be because it doesn't contain such articles, and yet you still want the entry in the list of references to start with the title. Indeed, the only differences between it and inreference are the lack of a lista field to present an alphabetized entry, and the fact that any postnote field will be printed verbatim, rather than formatted as an alphabetized entry. (Cf. inreference, above.)

report This entry type is a biblatex generalization of the traditional BIBTEX type techreport. Instructions for such entries are rather thin on the ground in the *Manual* (17.241), so I have followed the generic advice about formatting it like a book, and hope that the results conform to the specification. Its main peculiarities are the institution field in place of a publisher, the type field for identifying the kind of report in question, and the isrn field containing the International Standard Technical Report Number of a technical report. As in standard biblatex, if you use a techreport entry, then the type field automatically defaults to \bibstring{techreport}. As with booklet and manual, you can also use a book entry, putting the report type in note and the institution in publisher. (See herwign:office.)

review As its name suggests, this entry type was designed for reviews published in periodicals, and if you've already read the article documentation above you'll know that I haven't yet found an example where you absolutely need to use it for the author-date style. The code to process such an entry remains in biblatex-chicago-authordate, so if you are building a .bib file for use with both Chicago styles then any review entries in it will work fine in both, but otherwise the article type will suffice. If you find I'm wrong about this, please let me know. (Cf. barcott:review:15, bundy:macneil, Clemens:letter, gourmet:052006, kozinn:review, nyt:trevorobit, ratliff:review:15, unsigned:ranke, wallraff:word.)

suppbook This is the entry type to use if the main focus of a reference is supplemental material in a book or in a collection, e.g., an introduction, afterword, or forward, either by the same or by a different author. There are two mechanisms in biblatex-chicago for producing such a citation. First, these three just-mentioned types of material, and only these three types, can be referenced using the introduction, afterword, or foreword fields, a system that requires you simply to define one of them in any way and leave the others undefined. The macros don't use the text provided by such an entry, they merely check to see if one of them is defined, in order to decide which sort of pre- or post-matter is at stake, and to print the appropriate string before the title in the list of references, and possibly also in the list of shorthands. This mechanism works without modification across multiple languages, but I have also provided functionality which allows you to cite any sort of supplemental material whatever, using the type field. Under this second system, simply put the nature of the material, including the relevant preposition, in that field, beginning with a lowercase letter so biblatex can decide whether it needs capitalization depending on the context. Examples might be "preface to" or "colophon of." (Please note, however, that unless you use a \bibstring command in the type field, the resultant entry will not be portable across languages.)

The other rules for constructing your .bib entry remain the same. The author field refers to the author of the introduction or afterword, while bookauthor refers to the author of the main text of the work, if the two differ. If the focus of the reference is the main text of the book, but you want to mention the name of the writer of an introduction or afterword for completeness, then the normal biblatex rules apply, and you can just put their name in the appropriate field of a book entry, that is, in the foreword, afterword, or introduction field. (See *Manual* 17.74–75; friedman:intro, polakow:afterw, prose:intro).

suppcollection This fulfills a function analogous to suppbook. Indeed, I believe the **suppbook** type can serve to present supplemental material in both types of work, so this entry type is an alias to suppbook, which see.

suppperiodical This type is intended to allow reference to generically-titled works in periodicals, such as regular columns or letters to the editor. Biblatex also provides the review type for this purpose, and in the notes & bibliography style suppperiodical is an alias of review. In the author-date style, however, as discussed above, you really only need the article entry type for this purpose, though I have re-

tained suppperiodical in order to facilitate switching between the two Chicago styles.

video   This is the last of the new audiovisual entry types, and as its name suggests it is intended for citing visual media, be it films of any sort or TV shows, broadcast, on the Net, on VHS, DVD, or Blu-ray. As with the music type discussed above, certain choices had to be made when associating the production roles found, e.g., on a DVD, to those bookish ones provided by biblatex. Here are the main correspondences:

author: This will not infrequently be left undefined, as the director of a film should be identified as such and therefore placed in the editor field with the appropriate editortype (see below). You will need it, however, to identify the composer of, e.g., an oratorio on VHS (handel:messiah:15), or perhaps the provider of commentaries or other extras on a film DVD (cleese:holygrail).

editor, editora, editorb: The director or producer, or possibly the performer or conductor in recorded musical performances. These will ordinarily follow the title of the work, though the usual useauthor and useeditor options can alter the presentation within an entry. Because these are non-standard roles, you will need to identify them using the following:

editortype, editoratype, editorbtype: The most common roles, all associated with specific bibstrings (or their absence), will likely be director, producer, and, oddly, none. The last is particularly useful if you want to identify performers, as they usually don't need further specifying and this role prevents biblatex from falling back on the default editor bibstring.

title, titleaddon, booktitle, maintitle: As with the other audiovisual types, video serves as an analogue both to books and to collections, so the title may be of a whole film DVD or of a TV series, or it may identify one episode in a series or one scene in a film. In the latter cases, the title of the whole would go in booktitle. The titleaddon field may be useful for specifying the season and/or episode number of a TV series, or for any other information that needs to come between the title and the booktitle (cleese:holygrail, episode:tv, handel:messiah:15). As in the music type, maintitle may be necessary for a boxed set or something similar.

date, origdate, pubstate: The publication details of this sort of material are usually straightforward, at least compared with the music type, but there will be occasions when you need two dates. When citing an episode of a long-running TV series you may need both a date for the episode and either a range for the whole run or a year for the release of the box set, and when citing a film on DVD you may want to present both the original release date and the date of release on DVD. In these cases, the usual chicago-authordate mechanisms for choosing the date to appear at the head of an entry apply. You can also use the standard pubstate field with reprint in it to control the printing of the original date in parentheses at the end of the entry, though I have altered the string that is printed there (see next item). I have also disabled the printing of the \bibstring{reprint} before the publication information, as it doesn't really apply to this class of material. Cf. episode:tv, hitchcock:nbynw; pubstate, below.

entrysubtype: In most entry types, the string printed in parentheses to date the original appearance of a work is "Orig. pub." This won't work in video, so by default in this entry type it will print "Orig. released." As this isn't quite right for TV shows, you can place the exact string tv into the entrysubtype field to obtain "Orig. shown." Alternatively, you can put whatever you like in the pubstate field, including parentheses and the year

if you want them, and all of it will appear where it should. (The *Manual* gives no guidance on presenting televisual materials, so I've improvised. Any improvements will be gratefully considered.)

type: As in all the audiovisual entry types, the type field holds the medium of the title, e.g., 8 mm, VHS, DVD, Blu-ray, MPEG.

As with the music type, entries in dates-test.bib should at least give you a good idea of how all this works. (Cf. 17.270, 273; cleese:holygrail, episode:tv, handel:messiah:15, hitchcock:nbynw, loc:city.)

5.2 Entry Fields

The following discussion presents, in alphabetical order, a complete list of the entry fields you will need to use biblatex-chicago-authordate. As in section 5.1, I shall include references to the numbered paragraphs of the *Chicago Manual of Style*, and also to the entries in dates-test.bib. Many fields are most easily understood with reference to other, related fields. In such cases, cross references should allow you to find the information you need.

addendum As in standard biblatex, this field allows you to add miscellaneous information to the end of an entry, after publication data but before any url or doi field. In the patent entry type (which see), it will be printed in close association with the filing and issue dates. In any entry type, if your data begins with a word that would ordinarily only be capitalized at the beginning of a sentence, then simply ensure that that word is in lowercase, and the style will take care of the rest. Cf. note. (See *Manual* 17.145, 17.123; davenport:attention, natrecoff:camera.)

afterword In most circumstances, this field will function as it does in standard biblatex, i.e., you should include here the author(s) of an afterword to a given work. The *Manual* suggests that, as a general rule, the afterword would need to be of significant importance in its own right to require mentioning in the reference apparatus, but this is clearly a matter for the user's judgment. As in biblatex, if the name given here exactly matches that of an editor and/or a translator, then biblatex-chicago will concatenate these fields in the formatted references.

As noted above, however, this field has a special meaning in the suppbook entry type, used to make an afterword, foreword, or introduction the main focus of a citation. If it's an afterword at issue, simply define afterword any way you please, leave foreword and introduction undefined, and biblatex-chicago will do the rest. Cf. foreword and introduction. (See *Manual* 17.46, 17.74; polakow:afterw.)

annotation At the request of Emil Salim, biblatex-chicago has, as of version 0.9, added a package option (see annotation below, section 4.4.3) to allow you to produce annotated lists of references. The formatting of such a list is currently fairly basic, though it conforms with the *Manual's* minimal guidelines (16.77). The default in chicago-authordate.cbx is to define \DeclareFieldFormat{annotation} using \par\nobreak \vskip \bibitemsep, though you can alter it by re-declaring the format in your preamble. The page-breaking algorithms don't always give perfect results here, but the default formatting looks, to my eyes, fairly decent. In addition to tweaking the field formatting you can also insert \par (or even \vadjust{\eject}) commands into the text of your annotations to improve the appearance. Please consider the annotation option a work in progress, but it is usable now. (N.B.: The BibTEX field annote serves as an alias for this.)

annotator I have implemented this biblatex field pretty much as that package's standard styles do, even though the *Manual* doesn't actually mention it. It may be useful for some purposes. Cf. commentator.

author For the most part, I have implemented this field in a completely standard BibTEX fashion. Remember that corporate or organizational authors need to have an

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extra set of curly braces around them (e.g., `{{Associated Press}}`) to prevent BɪʙTEX from treating one part of the name as a surname (17.47, 17.197; assocpress:gun, chicago:manual:15). If there is no author, then biblatex-chicago will look, in sequence, for an editor, translator, or compiler (actually namec, currently) and use that name (or those names) instead, followed by the appropriate identifying string (esp. 17.41, also 17.28–29, 17.88, 17.95, 17.172; boxer:china, brown:bremer, harley:cartography, schellinger:novel, sechzer:women, silver:gawain, soltes:georgia). Biber now takes care of alphabetizing entries no matter which name appears at their head, and the package also automatically provides a name for citations.

As its name suggests, the author-date style very much wants to have a name of some sort present both for the entries in the list of references and for the in-text citations. Indeed, "this system works best where all or most of the sources are easily convertible to author-date references" (16.4). The *Manual* is nothing if not flexible, however, so with unsigned articles or encyclopedia entries the journaltitle or title may take the place of the author (gourmet:052006, lakeforester:pushcarts, nyt:trevorobit, unsigned:ranke, wikipedia:bibtex). Even in such article entries, however, it may be advantageous to provide a (formatted and abbreviated) shortauthor field to keep the in-text citations to a reasonable length, though not at the expense of making it hard to find the relevant entries in the reference list.

If you wish to emphasize the activity of an editor or a translator, you can use the biblatex and biblatex-chicago options `useauthor=false`, `useeditor=false`, `usetranslator=false`, and `usecompiler=false` in the options field to choose which one appears at the head of an entry. A peculiarity of this system of toggles is that in order to ensure that the title of a book appears at the head of an entry, you would need to use *all four* of the toggles, even though the hypothetical entry contains no translator. Internally, biblatex-chicago is either searching for an author-substitute, or it is skipping over elements of the ordered, unidirectional chain author -> editor -> translator -> compiler -> title. If you don't include `usetranslator=false` in the options field, then the package begins its search at translator and continues on to namec, even though you have `usecompiler=false` in options. The result will be that the compilers' names will appear at the head of the entry. If you want to skip over parts of the chain, you must turn off *all* of the parts up to the one you wish printed. Another peculiarity of the system is that setting the Chicago-specific `usecompiler` option to `false` doesn't remove namec from the sorting list, whereas the other standard biblatex toggles *do* remove their names from the sorting list, so in some corner cases you may need the sortkey field. See `\DeclareSortingScheme` in section 5.4.1, below.

This system of toggles, then, can turn off biblatex-chicago's mechanism for finding a name to place at the head of an entry, but it also very usefully adds the possibility of citing a work with an author by its editor, compiler or translator instead (17.45; eliot:pound), something that wasn't possible before. For full details of how this works, see the editortype documentation below. (Of course, in collection and proceedings entry types, an author isn't expected, so there the editor is required, as in standard biblatex. Also, in article entries with entrysubtype magazine, the absence of an author triggers the use of the journaltitle in its stead. See those entry types for further details.)

NB: The *Manual* provides specific instructions for formatting the names of both anonymous and pseudonymous authors (17.32–39). The use of "Anonymous" as the name is "generally to be avoided," but may in some cases be useful "in a bibliography in which several anonymous works need to be grouped." I would add that sometimes it's the simplest option for a difficult citation — cf. virginia:plantation:15, where placing "`Anon.`" in the author field seems about the only way to fit this text into the author-date style. If "the authorship is known or guessed at but was omitted on the title page," then you need to use the authortype field to let biblatex-chicago know this fact. If the author is

known (horsley:prosodies), then put `anon` in the authortype field, if guessed at (cook:sotweed) put `anon?` there. (In both cases, biblatex-chicago tests for these *exact* strings, so check your typing if it doesn't work.) This will have the effect of enclosing the name in square brackets, with or without the question mark indicating doubt. As long as you have the right string in the authortype field, biblatex-chicago-authordate will also do the right thing automatically in text citations.

The nameaddon field furnishes the means to cope with the case of pseudonymous authorship. If the author's real name isn't known, simply put `pseud.` (or `\bibstring{pseudonym}`) in that field (centinel:letters). If you wish to give a pseudonymous author's real name, simply include it there, formatted as you wish it to appear, as the contents of this field won't be manipulated as a name by biblatex (lecarre:quest, stendhal:parma). If you have given the author's real name in the author field, then the pseudonym goes in nameaddon, in the form `Firstname Lastname, pseud.` (creasey:ashe:blast, creasey:morton:hide, creasey:york:death). This latter method will allow you to keep all references to one author's work under different pseudonyms grouped together in the list of references, a method recommended by the *Manual*.

One final piece of advice. An institutional author's name, or a journal's name being used in place of an author, can be rather too long for in-text citations. In unsigned:ranke I placed an abbreviated form of the journaltitle into shortauthor, a practice condoned by the *Manual* (17.159) even in author-date reference lists. In iso:electrodoc:15, I provided a shorthand field, which by default in biblatex-chicago-authordate will appear in text citations. With this release, you can expand the abbreviation inside the list of references itself, as suggested by the *Manual*, (17.47). Please see customc above and shorthands below for the details. (A list of shorthands can still clarify the abbreviation, if you wish.)

authortype In biblatex-chicago, this field serves a function very much in keeping with the spirit of standard biblatex, if not with its letter. Instead of allowing you to change the string used to identify an author, the field allows you to indicate when an author is anonymous, that is, when his or her name doesn't appear on the title page of the work you are citing. As I've just detailed under author, the *Manual* generally discourages the use of "Anonymous" (or "Anon." as an author, though in some cases it may well be your best option. If, however, the name of the author is known or guessed at, then you're supposed to enclose that name within square brackets, which is exactly what biblatex-chicago does for you when you put either `anon` (author known) or `anon?` (author guessed at) in the authortype field. (Putting the square brackets in yourself doesn't work right, hence this mechanism.) The macros test for these *exact* strings, so check your typing if you don't see the brackets. Assuming the strings are correct, biblatex-chicago will also automatically do the right thing in citations. (See the author docs just above. Also *Manual* 17.33–34; cook:sotweed, horsley:prosodies.)

bookauthor For the most part, as in biblatex, a bookauthor is the author of a booktitle, so that, for example, if one chapter in a book has different authorship from the book as a whole, you can include that fact in a reference (17.75; will:cohere). Keep in mind, however, that the entry type for introductions, forewords and afterwords (suppbook) uses bookauthor as the author of title (polakow:afterw, prose:intro).

bookpagination This, a standard biblatex field, allows you automatically to prefix the appropriate string to information you provide in a pages field. If you leave it blank, the default is to print no identifying string (the equivalent of setting it to none), as this is the practice the *Manual* recommends for nearly all page numbers. Even if the numbers you cite aren't pages, but it is otherwise clear from the context what they represent, you can still leave this blank. If, however, you specifically need to identify what sort of unit the pages field represents, then you can either hand-format that field yourself, or use one of the provided bibstrings in the

bookpagination field. These bibstrings currently are `column, line, paragraph,` `page, section,` and `verse,` all of which are used by biblatex's standard styles.

There are two points that may need explaining here. First, all the bibstrings I have just listed follow the Chicago specification, which may be confusing if they don't produce the strings you expect. Second, remember that bookpagination applies only to the pages field — if you need to format a citation's postnote field, then you must use pagination, which see (15.45–46, 17.128–138).

booksubtitle The subtitle for a booktitle. See the next entry for further information.

booktitle In the bookinbook, inbook, incollection, inproceedings, and letter entry types, the booktitle field holds the title of the larger volume in which the title itself is contained as one part. It is important not to confuse this with the maintitle, which holds the more general title of multiple volumes, e.g., *Collected Works*. It is perfectly possible for one .bib file entry to contain all three sorts of title (euripides:orestes, plato:republic:gr). You may also find a booktitle in other sorts of entries (e.g., book or collection), but there it will almost invariably be providing information for the BibTEX cross-referencing apparatus (prairie:state), which I discuss below (**crossref**). The booktitle takes sentence-style capitalization in author-date.

booktitleaddon An annex to the booktitle. It will be printed in the main text font, without quotation marks. If your data begins with a word that would ordinarily only be capitalized at the beginning of a sentence, then simply ensure that that word is in lowercase, and biblatex-chicago will automatically do the right thing.

chapter This field holds the chapter number, mainly useful only in an inbook or an incollection entry where you wish to cite a specific chapter of a book (ashbrook:brain).

commentator I have implemented this biblatex field pretty much as that package's standard styles do, even though the *Manual* doesn't actually mention it. It may be useful for some purposes. Cf. annotator.

crossref Biblatex uses the standard BibTEX cross-referencing mechanism, and has also introduced a modified one of its own (xref). The crossref field works exactly the same as it always has, while xref attempts to remedy some of the deficiencies of the usual mechanism by ensuring that child entries will inherit no data at all from their parents. Having said all that, a few further instructions may be in order for users of both biblatex and biblatex-chicago. First, remember that fields in a collection entry, for example, differ from those in an incollection entry. In order for the latter to inherit the booktitle field from the former, the former needs to have such a field defined, even though a collection entry has no use itself for such an entry (see ellet:galena, keating:dearborn, lippincott:chicago, and prairie:state). Note also that an entry with a crossref field will mechanically try to inherit all applicable fields from the entry it cross-references. In the case of ellet:galena et al., you can see that this includes the subtitle field found in prairie:state, which would then, quite incorrectly, be added to the title of ellet:galena. In cases like these, you could just make sure that prairie:state didn't contain such a field, by placing the entire title + subtitle in the title field, separated by a colon. Alternatively, as you can see in ellet:galena, you can just define an empty subtitle field to prevent it inheriting the unwanted subtitle from prairie:state.

Turning now more narrowly to biblatex-chicago, the *Manual* (17.70) specifies that if you cite several contributions to the same collection, all (including the collection itself) may be listed separately in the list of references, which the package does automatically, using the default inclusion threshold of 2 in the case both of crossref'ed and xref'ed entries. (The familiar `\nocite` command may also help in some circumstances.) In the list of references an abbreviated form will

be appropriate for all the child entries. The current version of biblatex-chicago-authordate implements these instructions, but only if you use a crossref or an xref field, and only in incollection, inproceedings, or letter entries (on the last named, see just below). If you look at ellet:galena, keating:dearborn, lippincott:chicago, and prairie:state you'll see this mechanism in action in the list of references. If you wish to disable this, then simply don't use a crossref or xref field in your entries.

A published collection of letters requires a somewhat different treatment (17.77–78). If you cite more than one letter from the same collection, then the *Manual* specifies that only the collection itself — probably in a book entry — should appear in the list of references. In the author-date style, it discourages individual letters from appearing in that list at all, even if only one is cited from a collection. If you have special reason to do so, however, you can still present individual published letters there, and they too can use the system of shortened references just outlined, even though the *Manual* doesn't explicitly require it. As with incollection and inproceedings, mere use of a crossref or xref field will activate this mechanism, while avoidance of said fields will disable it. (See white:ross:memo, white:russ, and white:total, for examples of the xref field in action in this way, and please note that the second of these entries is entirely fictitious, provided merely for the sake of example.)

I should also take this opportunity to mention that you need to be careful when using the shorthand field in conjunction with the crossref or xref fields, bearing in mind the complicated questions of inheritance posed by all such cross-references, most especially in letter, incollection, and inproceedings entries. A shorthand field in a parent entry is, at least in the current state of biblatex-chicago, a bad idea.

date Predictably, this is one of the key fields for the author-date style, and one which, as a general rule, every .bib entry designed for this system ought to contain. So important is it, that biblatex-chicago-authordate will, in most entry types, supply a missing \bibstring{nodate} if there is no date otherwise provided; citations will look like (Author n.d.), and entries in the list of references will begin: Author, Firstname. n.d. This seems simple enough, but there are a surprising number of complications which require attention.

First, with Biber, an absent date will automatically provoke it into searching for other sorts of dates in the entry, in the order date, eventdate, origdate, urldate. Only when it finds no year at all will it fall back on \bibstring{nodate}. You can eliminate some of these dates from the running, or change the search order, using the \DeclareLabelyear command in your preamble, but please be aware that I have hard-coded this order into the author-date style in order to cope with some tricky corners of the specification. If you reorder these dates, and your references enter these tricky corners, the results might be surprising. (Cf. section 4.5.2 in biblatex.pdf for the \DeclareLabelyear command.) Second, the entry types in which this automatic provision is turned off are inreference, misc, and reference, none of which may be expected in the standard case to have a date provided. In all other entry types "n.d." will appear if no date is provided, though you can turn this off throughout the document in all entry types with the option nodates=false when loading biblatex-chicago in your preamble. (See section 5.4.2, below.) Third, if you wish to provide the "n.d." yourself in the year field, please instead put \bibstring{nodate} there, as otherwise the punctuation in citations will come out (subtly) wrong. Fourth, while we're on the subject, the year field is also the place for things like "forthcoming," though you should use the \autocap macro there to make sure the word comes out correctly in both citations and the list of references. The reason for this is that the date field accepts only numerical data, in iso8601 format (yyyy-mm-dd), whereas year can, conveniently, hold just about anything. It may be worth noting here that Biber is somewhat more exacting when parsing the date field than BibTeX, so a field looking like 1968/75 will simply be ignored, producing "n.d." in the

output — you need 1968/1975 instead. If you want a more compressed year range, then you'll want to use the year field.

Fifth, for most entry types, only a year is really necessary, and in all types only the year — or year range — will be printed in text citations and at the head of entries in the list of references. More specific date fields are often present, however, in article, misc, online, patent, and unpublished entries, for all of which any day or month provided will be printed later in the reference list entry. If you follow the recommendations of the *Manual* and document newspaper articles within running text (17.191), then the citations need to contain the complete date along with the journaltitle. Placing `cmsdate=full` (and `skipbib`) in the options field of an article or a review entry, alongside a possible `useauthor=false`, should allow you to achieve this. The *Manual* is a little inconsistent when presenting the names of months in the author-date style, but currently biblatex-chicago-authordate uses abbreviated forms, which you can change by setting the option `dateabbrev=false` in your document preamble. (Cf. assoc-press:gun, barcott:review:15, batson, creel:house, nass:address, petroff:impurity, powell:email.)

Sixth, the *Manual* (17.125–7) provides a number of options for when a particular entry — a reprinted edition, say — has more than one date, and biblatex-chicago-authordate allows you to choose among all of them. The user interface is a little more complicated than I had hoped, but I shall attempt to explain it here as clearly as I can. If a reprinted book, say, has both a date of publication for the reprint edition and an origdate for the original edition, then by default biblatex-chicago-authordate will use the date in citations and at the head of the entry in the reference list. If you inform biblatex-chicago that the book is a reprint by putting the string `reprint` in the pubstate field, then a parenthetical notice will be printed at the end of the entry saying "(Orig. pub. 1898.)" With no pubstate field (and no `cmsdate` option), the algorithms will ignore the origdate.

If, for any reason, you wish the origdate to appear at the head of the entry, then you need to use the `cmsdate` toggle in the options field. This has 4 possible states relevant to this context, though there is a fifth state (`full`) which I've discussed two paragraphs up:

1. `cmsdate=on` prints the origdate at the head of the entry in the list of references and in citations: (Author 1898).

2. `cmsdate=new` prints both the origdate and the date, using the *Manual's* "new" format: (Author 1898/1952).

3. `cmsdate=old` prints both the origdate and the date, using the *Manual's* "old" format: (Author [1898] 1952).

4. `cmsdate=off` is the default, discussed above: (Author 1952).

In the first three cases, if you put the string `reprint` in the pubstate field, then the publication data in the list of references will include a notice, formatted according to the specifications, that the modern, cited edition is a reprint. In the first case, since the date hasn't yet been printed, this publication data will also include the date of the modern reprint.

Let us imagine, however, that your list of references contains another book by the same author, also a reprint edition: (Author 1896/1974). How will these two works be ordered in the list of references? By whatever appears in the date field, which appears first in the default definition of `\DeclareLabelyear`, and which in this case will be wrong, because the entries should always be ordered by the *first* date to appear there, in this case the contents of origdate. In this example, the solution can be as simple as a sortyear field set to something earlier than the date of the other work, e.g., 1951.

And if the original publication dates of the two works are the same? Just as when it is ordering entries, biblatex will always first process the contents of the

date field when it is deciding whether to add the alphabetical suffix (a,b,c etc.) to the year to distinguish different works by the same author published in the same year. You can't even put the suffix on yourself because the origdate field only accepts numerical data. Citations of the two works should read, e.g., (Author 1898a) and (Author 1898b), but will in fact read, ambiguously, (Author 1898) and (Author 1898). Here we are forced to resort to an unusual expedient, which amounts to switching the two date fields, placing the earlier date in date and the later one in origdate. Biblatex-chicago-authordate tests for this condition using a simple arithmetical comparison between the two years, then printing the two dates according to the state of the cmsdate toggle. The four states of this toggle are the same as before, but there are only three possible outcomes, as follows:

1. cmsdate=off (the default) and cmsdate=on *both* print the date at the head of the entry in the list of references and in citations: (Author 1898a), (Author 1898b).

2. cmsdate=new prints both the date and the origdate, using the *Manual's* "new" format: (Author 1898a/1952), (Author 1898b/1974).

3. cmsdate=old prints both the date and the origdate, using the *Manual's* "old" format: (Author [1898a] 1952), (Author [1898b] 1974).

If, for some reason, the automatic switching of the dates cannot be achieved, perhaps in crossref'd letter entries that you really want to have in your list of references (white:ross:memo, white:russ), or perhaps in a reprint edition that hasn't yet appeared in print (preventing the comparison between a year and the word "forthcoming"), then you can use the per-entry option switchdates in the options field to achieve the required effects. It may also be worth remarking that the instructions in the *Manual* aren't entirely clear on the subject of the alphabetical affix when both dates are used in a citation or at the head of an entry. It's possible that the differentiation between (Author 1898/1952) and (Author 1898/1974) is good enough without affixing anything to the first year, but then in this situation you would have to be using either cmsdate=new or cmsdate=old, so the switching functionality at least allows maximum flexibility.

Finally, in the misc entry type this field can help to distinguish between two classes of archival material, letters and "letter-like" sources using origdate while others (interviews, wills, contracts) use date. (See misc in section 5.1 for the details.) If such an entry, as may well occur, contains only an origdate, as can also be the case in the letter entries I mentioned in the previous paragraph, Biber and the default \DeclareLabelyear definition now make it possible to do without a cmsdate option, as biblatex will in such a case use the origdate to order the entries in a reference list, and will also append the alphabetical suffix if more than one entry by the same author has the same origyear. I recommend that you have a look through dates-test.bib to see how all these complications will affect the construction of your .bib database, especially at aristotle:metaphy:gr, creel:house, emerson:nature, james:ambassadors, maitland:canon, maitland:equity, schweitzer:bach, spock:interview, white:ross:memo, and white:russ. Cf. also origdate and year, below, and the cmsdate, nodates, and switchdates options in sections 5.4.1 and 5.4.4.

day This field, as of biblatex 0.9, is obsolete, and will be ignored if you use it in your .bib files. Use date instead.

doi Standard biblatex field. The Digital Object Identifier of the work, which the *Manual* suggests you can use "in place of page numbers or other locators" (17.181; friedman:learning). Cf. url.

edition Standard biblatex field. If you enter a plain cardinal number, biblatex will convert it to an ordinal (chicago:manual:15), followed by the appropriate string.

Any other sort of edition information will be printed as is, though if your data begins with a word (or abbreviation) that would ordinarily only be capitalized at the beginning of a sentence, then simply ensure that that word (or abbreviation) is in lowercase, and biblatex-chicago will automatically do the right thing (babb:peru, times:guide). In most situations, the *Manual* generally recommends the use of abbreviations in the list of references, but there is room for the user's discretion in specific citations (emerson:nature).

editor   As far as possible, I have implemented this field as biblatex's standard styles do, but the requirements specified by the *Manual* present certain complications that need explaining. Lehman points out in his documentation that the editor field will be associated with a title, a booktitle, or a maintitle, depending on the sort of entry. More specifically, biblatex-chicago associates the editor with the most comprehensive of those titles, that is, maintitle if there is one, otherwise booktitle, otherwise title, if the other two are lacking. In a large number of cases, this is exactly the correct behavior (adorno:benj, centinel:letters, plato:republic:gr, among others). Predictably, however, there are numerous cases that require, for example, an additional editor for one part of a collection or for one volume of a multi-volume work. For these cases I have provided the namea field. You should format names for this field as you would for author or editor, and these names will always be associated with the title (donne:var:15).

As you will see below, I have also provided a nameb field, which holds the translator of a given title (euripides:orestes). If namea and nameb are the same, biblatex-chicago will concatenate them, just as biblatex already does for editor, translator, and namec (i.e., the compiler). Furthermore, it is conceivable that a given entry will need separate editors for each of the three sorts of title. For this, and for various other tricky situations, there is the \partedit macro (and its siblings), designed to be used in a note field, in one of the titleaddon fields, or even in a number field (howell:marriage). (Because the strings identifying an editor differ in notes and bibliography, one can't simply write them out in such a field when using the notes & bibliography style, but you can certainly do so in the author-date style, if you wish. Using the macros will make your .bib file more portable across both Chicago specifications, and also across multiple languages, but they are otherwise unnecessary. Cf. section 6, and also namea, nameb, namec, and translator.)

editora   The newer releases of biblatex provide these fields as a means to specify addi-
editorb   tional contributors to texts in a number of editorial roles. In the Chicago styles
editorc   they seem most relevant for the audiovisual types, especially music and video, where they help to identify conductors, directors, producers, and performers. To specify the role, use the fields editoratype, editorbtype, and editorctype, which see. (Cf. bernstein:shostakovich, handel:messiah:15.)

editortype   Normally, with the exception of the article type, biblatex-chicago-authordate will automatically find a name to put at the head of an entry, starting with an author, and proceeding in order through editor, translator, and namec (the compiler). If all four are missing, then the title will be placed at the head. (In article entries with a magazine entrysubtype, a missing author immediately prompts the use of journaltitle at the head of an entry. See above under article for details.) The editortype field provides even greater flexibility, allowing you to choose from a variety of editorial roles while only using the editor field. You can do this even though an author is named (eliot:pound shows this mechanism in action for a standard editor, rather than a compiler). Two things are necessary for this to happen. First, in the options field you need to set useauthor=false (if there is an author), then you need to put the name you wish to see at the head of your entry into the editor or the namea field. If the "editor" is in fact a compiler, then you need to put compiler into the editortype field, and biblatex will print the correct string after the name in the list of references.

There are a few details of which you need to be aware. Because biblatex-chicago has added the namea field, which gives you the ability to identify the editor specifically of a title as opposed to a maintitle or a booktitle, the editortype mechanism checks first to see whether a namea is defined. If it is, that name will be used at the head of the entry, if it isn't it will go ahead and look for an editor. Biblatex's sorting algorithms, and also its labelname mechanism, should both work properly no matter sort of name you provide, thanks to Biber and the (default) Chicago-specific definitions of \DeclareLabelname and \DeclareSortingScheme. (Cf. section 5.4.1, below). If, however, the namea field provides the name, and that name isn't automatically shortened properly by biblatex, then your .bib entry will need to have a shorteditor defined to help with in-text citations, not a shortauthor, possibly ruled out because useauthor=false.

In biblatex 0.9 Lehman has reworked the string concatenation mechanism, for reasons he outlines in his RELEASE file, and I have followed his lead. In short, if you define the editortype field, then concatenation is turned off, even if the name of the editor matches, for example, that of the translator. In the absence of an editortype, the usual mechanisms remain in place, that is, if the editor exactly matches a translator and/or a namec, or alternatively if namea exactly matches a nameb and/or a namec, then biblatex will print the appropriate strings. The *Manual* specifically (17.41) recommends not using these identifying strings in citations, and biblatex-chicago-authordate follows that recommendation. If you nevertheless need to provide such a string, you'll have to do it manually in the shorteditor field, or perhaps, in a different sort of entry, in a shortauthor field.

It may also be worth noting that because of certain requirements in the specification – absence of an author, for example – the useauthor mechanism won't work properly in the following entry types: collection, letter, patent, periodical, proceedings, suppbook, suppcollection, and suppperiodical.

editoratype
editorbtype
editorctype These fields identify the exact role of the person named in the corresponding editor[a-c] field. Note that they are not part of the string concatenation mechanism. I have implemented them just as the standard styles do, and they have now found a use particularly in music and video entries. Cf. bernstein:shostakovich, handel:messiah:15.

eid Standard biblatex field, providing a string or number some journals use uniquely to identify a particular article. Only applicable to the article entry type. Not typically required by the *Manual*.

entrysubtype Standard and very powerful biblatex field, left undefined by the standard styles. In biblatex-chicago-authordate it has five very specific uses, the first three of which I have designed in order to maintain, as much as possible, backward compatibility with the standard styles. First, in article and periodical entries, the field allows you to differentiate between scholarly "journals," on the one hand, and "magazines" and "newspapers" on the other. Usage is fairly simple: you need to put the exact string magazine into the entrysubtype field if you are citing one of the latter two types of source, whereas if your source is a "journal," then you need do nothing.

The second use involves references to works from classical antiquity and, according to the *Manual*, from the Middle Ages, as well. When you cite such a work using the traditional divisions into books, sections, lines, etc., divisions which are presumed to be the same across all editions, then you need to put the exact string classical into the entrysubtype field. This has no effect in the list of references, which will still present the particular edition you are using, but it does affect the formatting of in-text citations, in two ways. First, it suppresses some of the punctuation. Second, and more importantly, it suppresses the date field in favor of the title, so that citations look like (Aristotle *Metaphysics* 3.2.996b5–8) instead of (Aristotle 1997, 3.2.996b5–8). This mechanism may also prove useful in misc entries for citations from the Bible or other sacred texts (cf.

genesis), and for citing archival collections (house:papers), where it produces citations of the form (House Papers). (Cf. the next but one paragraph.)

If you wish to reference a classical or medieval work by the page numbers of a particular, non-standard edition, then you shouldn't use the `classical` entry-subtype toggle. Also, and the specification isn't entirely clear about this, works from the Renaissance and later, even if cited by the traditional divisions, seem to have citations formatted normally, and therefore don't need an entrysubtype field. (See *Manual* 17.246–262; aristotle:metaphy:gr, plato:republic:gr; euripides:orestes is an example of a translation cited by page number in a modern edition.)

The third use of the entrysubtype field occurs in misc entries. If such an entry contains no such field, then the citation will be treated just as the standard biblatex styles would, including the use of italics for the title. Any string at all in entrysubtype tells biblatex-chicago to treat the source as part of an unpublished archive. Please see section 5.1 above under **misc** for all the details on how these citations work.

Fourth, the field can be defined in the artwork entry type in order to refer to a work from antiquity whose title you do not wish to be italicized. Please see the documentation of artwork above for the details. Fifth, and finally, you can use the exact string `tv` to identify televisual material as a subset of the video entry type. This will only affect the entry in the list of references if you use `reprint` in the pubstate field in order to print the date a program was originally shown in parentheses at the end of such an entry. (It's a niche usage but it at least maintains consistency for the `reprint` mechanism. Cf. pubstate, below.)

eprint
eprintclass
eprinttype   Kazuo Teramoto suggested adding biblatex's excellent eprint handling to biblatex-chicago, and he sent me a patch implementing it. With minor alterations, I have applied it to this release, so these three fields now work more or less as they do in standard biblatex. They may prove helpful in providing more abbreviated references to online content than conventional URLs, though I can find no specific reference to them in the *Manual*.

eventdate   This is a standard biblatex field, added recently to the **music** entry type in case users need it to identify a particular recording session or concert. See the documentation of that type above. In the default configuration of `\DeclareLabel-year`, an entry missing a date will use the eventdate to find a year for the citation and list of references, though the rest of the field would in such a case be ignored in any entry other than music.

foreword   As with the afterword field above, foreword will in general function as it does in standard biblatex. Like afterword (and introduction), however, it has a special meaning in a suppbook entry, where you simply need to define it somehow (and leave afterword and introduction undefined) to make a foreword the focus of a citation.

holder   A standard biblatex field for identifying a patent's holder(s), if they differ from the author. The *Manual* has nothing to say on the subject, but biblatex-chicago prints it (them), in parentheses, just after the author(s).

howpublished   Standard biblatex field, mainly applicable in the booklet entry type, where it replaces the publisher. I have also retained it in the misc and unpublished entry types, for historical reasons, and either it or pubstate can be used in music entries to clarify publication details.

institution   Standard biblatex field. In the thesis entry type, it will usually identify the university for which the thesis was written, while in a report entry it may identify any sort of institution issuing the report.

introduction As with the afterword and foreword fields above, introduction will in general function as it does in standard biblatex. Like those fields, however, it has a special meaning in a suppbook entry, where you simply need to define it somehow (and leave afterword and foreword undefined) to make an introduction the focus of a citation.

isbn Standard biblatex field, for providing the International Standard Book Number of a publication. Not typically required by the *Manual*.

isrn Standard biblatex field, for providing the International Standard Technical Report Number of a report. Only relevant to the report entry type, and not typically required by the *Manual*.

issn Standard biblatex field, for providing the International Standard Serial Number of a periodical in an article or a periodical entry. Not typically required by the *Manual*.

issue Standard biblatex field, designed for article or periodical entries identified by something like "Spring" or "Summer" rather than by the usual month or number fields (brown:bremer).

issuesubtitle The subtitle for an issuetitle — see next entry.

issuetitle Standard biblatex field, intended to contain the title of a special issue of any sort of periodical. If the reference is to one article within the special issue, then this field should be used in an article entry (conley:fifthgrade), whereas if you are citing the entire issue as a whole, then it would go in a periodical entry, instead (good:wholeissue). The note field is the proper place to identify the type of issue, e.g., `special issue`, with the initial letter lower-cased to enable automatic contextual capitalization.

journalsubtitle The subtitle for a journaltitle — see next entry.

journaltitle Standard biblatex field, replacing the standard BibTeX field journal, which, however, still works as an alias. It contains the name of any sort of periodical publication, and is found in the article entry type. In the case where a piece in an article (entrysubtype `magazine`) doesn't have an author, biblatex-chicago provides for this field to be used as the author. See above (section 5.2) under **article** for details. The lakeforester:pushcarts and nyt:trevorobit entries in dates-test.bib will give you some idea of how this works.

keywords This field is biblatex's extremely powerful and flexible technique for filtering entries in a list of references, allowing you to subdivide it according to just about any criteria you care to invent. See biblatex.pdf (3.10.4) for thorough documentation. In biblatex-chicago, the field provides one convenient means to exclude certain entries from making their way into a list of references, though the toggle `skipbib` in the options field works just as well, and perhaps more simply. There are a few reasons for so excluding entries. When citing both an original text and its translation (see **userf**, below), the *Manual* (17.66) suggests including the original at the end of the translation's reference list entry, a procedure which requires that the original not also be printed as a separate entry (furet:passing:eng, furet:passing:fr, aristotle:metaphy:trans, aristotle:metaphy:gr). Well-known reference works (like the *Encyclopaedia Britannica*, for example) and many sacred texts need only be presented in citations, and not in the list of references (17.238–239; ency:britannica, genesis, wikiped:bibtex; see inreference and misc, above).

language A standard biblatex field, designed to allow you to specify the language(s) in which a work is written. As a general rule, the Chicago style doesn't require you to provide this information, though it may well be useful for clarifying

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the nature of certain works, such as bilingual editions, for example. There is at least one situation, however, when the *Manual* does specify this data, and that is when the title of a work is given in translation, even though no translation of the work has been published, something that might happen when a title is in a language deemed to be unparseable by a majority of your expected readership (17.65–67, 17.166, 17.177; chu:panda, pirumova, rozner:liberation). In such a case, you should provide the language(s) involved using this field, connecting multiple languages using the keyword and. (I have retained biblatex's \bibstring mechanism here, which means that you can use the standard bibstrings or, if one doesn't exist for the language you need, just give the name of the language, capitalized as it should appear in your text. You can also mix these two modes inside one entry without apparent harm.)

An alternative arrangement suggested by the *Manual* is to retain the original title of a piece but then to provide its translation, as well. If you choose this option, you'll need to make use of the **usere** field, on which see below. In effect, you'll probably only ever need to use one of these two fields in any given entry, and in fact biblatex-chicago will only print one of them if both are present, preferring usere over language for this purpose (see kern, pirumova:russian, and weresz). Note also that both of these fields are universally associated with the title of a work, rather than with a booktitle or a maintitle. If you need to attach a language or a translation to either of the latter two, you could probably manage it with special formatting inside those fields themselves.

lista   I intend this field specifically for presenting citations from reference works that are arranged alphabetically, where the name of the article rather than a page or volume number should be given. The field is a biblatex list, which means you should separate multiple items with the keyword and. Each item receives its own set of quotation marks, and the whole list will be prefixed by the appropriate string ("s.v.," *sub verbo*, pl. "s.vv."). Biblatex-chicago will only print such a field in a book or an inreference entry, and you should look at the documentation of these entry types for further details. (See *Manual* 17.238–239; grove:sibelius, times:guide, wikiped:bibtex.)

location   This is biblatex's version of the usual BibTeX field address, though the latter is accepted as an alias if that simplifies the modification of older .bib files. According to the *Manual* (17.99), a citation usually need only provide the first city listed on any title page, though a list of cities separated by the keyword "and" will be formatted appropriately. If the place of publication is unknown, you can use \autocap{n}.p. instead (17.102), though in many or even most cases this isn't strictly necessary (17.32–34; virginia:plantation:15). For all cities, you should use the common English version of the name, if such exists (17.101).

One other use needs explanation here. In article and periodical entries, there is usually no need for a location field, but "if a journal might be confused with another with a similar title, or if it might not be known to the users of a bibliography," then this field can present the place or institution where it is published (17.174, 17.196; garrett:15, kimluu:diethyl:15, and lakeforester:pushcarts).

mainsubtitle   The subtitle for a maintitle — see next entry.

maintitle   The main title for a multi-volume work, e.g., "Opera" or "Collected Works." It takes sentence-style capitalization in author-date. (See donne:var:15, euripides:-orestes, harley:cartography, lach:asia, pelikan:christian, and plato:republic:gr.)

maintitleaddon   An annex to the maintitle, for which see previous entry. Such an annex would be printed in the main text font. If your data begins with a word that would ordinarily only be capitalized at the beginning of a sentence, then simply ensure that that word is in lowercase, and biblatex-chicago will automatically do the right thing.

month   Standard biblatex field, containing the month of publication. This should be an integer, i.e., `month={3}` not `month={March}`. See date for more information.

namea   This is one of the fields biblatex provides for style writers to use, but which it leaves undefined itself. In biblatex-chicago it contains the name(s) of the editor(s) of a title, if the entry has a booktitle or maintitle, or both, in which situation the editor would be associated with one of these latter fields (donne:var:15). You should present names in this field exactly as you would those in an author or editor field, and the package will concatenate this field with nameb if they are identical. See under **editor** above for the full details. Cf. also nameb, namec, translator, and the macros `\partedit`, `\parttrans`, `\parteditandtrans`, `\partcomp`, `\parteditandcomp`, `\parttransandcomp`, and `\partedittransandcomp`, for which see section 5.3.1.

nameaddon   This field is provided by biblatex, though not used by the standard styles. In biblatex-chicago, it allows you to specify that an author's name is a pseudonym, or to provide either the real name or the pseudonym itself, if the other is being provided in the author field. The abbreviation "pseud." (always lowercase in English) is specified, either on its own or after the pseudonym (centinel:letters, creasey:ashe:blast, creasey:morton:hide, creasey:york:death, and lecarre:quest); `\bibstring{pseudonym}` does the work for you. See under **author** above for the full details.

In the customc entry type, on the other hand, which is used to create alphabetized expansions of shorthands, the nameaddon field allows you to change the default string linking the two parts of the expansion. The code automatically tests for a known bibstring, which it will italicize. Otherwise, it prints the string as is.

nameb   Like namea, above, this is a field left undefined by the standard biblatex styles. In biblatex-chicago, it contains the name(s) of the translator(s) of a title, if the entry has a booktitle or maintitle, or both, in which situation the translator would be associated with one of these latter fields (euripides:orestes). You should present names in this field exactly as you would those in an author or translator field, and the package will concatenate this field with namea if they are identical. See under the **translator** field below for the full details. Cf. also namea, namec, origlanguage, translator, userf and the macros `\partedit`, `\parttrans`, `\parteditandtrans`, `\partcomp`, `\parteditandcomp`, `\parttransandcomp`, and `\partedittransandcomp` in section 5.3.1.

namec   The *Manual* (17.41) specifies that works without an author may be listed under an editor, translator, or compiler, assuming that one is available, and it also specifies the strings to be used with the name(s) of compiler(s). All this suggests that the *Manual* considers this to be standard information that should be made available in a bibliographic reference, so I have added that possibility to the many that biblatex already provides, such as the editor, translator, commentator, annotator, and redactor, along with writers of an introduction, foreword, or afterword. Since biblatex.bst doesn't offer a compiler field, I have adopted for this purpose the otherwise unused field namec. It is important to understand that, despite the analogous name, this field does not function like namea or nameb, but rather like editor or translator, and therefore if used will be associated with whichever title field these latter two would be were they present in the same entry. Identical fields among these three will be concatenated by the package, and concatenated too with the (usually) unnecessary commentator, annotator and the rest. Also please note that I've arranged the concatenation algorithms to include namec in the same test as namea and nameb, so in this particular circumstance you can, if needed, make namec analogous to these two latter, title-only fields. (See above under **editortype** for details of how you can use that field to identify a compiler.)

It might conceivably be necessary at some point to identify the compiler(s) of a title separate from the compiler(s) of a booktitle or maintitle, but for the moment I've run out of available name fields, so you'll have to fall back on the \partcomp macro or the related \parteditandcomp, \parttransandcomp, and \partedittransandcomp, on which see Commands (section 5.3.1) below. (Future releases may be able to remedy this.) It may be as well to mention here too that of the three names that can be substituted for the missing author at the head of an entry, biblatex-chicago will choose an editor if present, then a translator if present, falling back to namec only in the absence of the other two, and assuming that the fields aren't identical, and therefore to be concatenated. In a change from the previous behavior, these algorithms also now test for namea or nameb, which will be used instead of editor and translator, respectively, giving the package the greatest likelihood of finding a name to place at the head of an entry. Biblatex's sorting algorithms, and also its labelname mechanism, should both work properly no matter sort of name you provide, thanks to Biber and the (default) Chicago-specific definitions of \DeclareLabelname and \DeclareSortingScheme. (Cf. section 5.4.1, below).

note As in standard biblatex, this field allows you to provide bibliographic data that doesn't easily fit into any other field. In this sense, it's very like addendum, but the information provided here will be printed just before the publication data. (See chaucer:alt, cook:sotweed, emerson:nature, and rodman:walk for examples of this usage in action.) It also has a specialized use in the periodical types (article and periodical), where it holds supplemental information about a journaltitle, such as "special issue" (conley:fifthgrade, good:wholeissue). In all uses, if your data begins with a word that would ordinarily only be capitalized at the beginning of a sentence, then simply ensure that that word is in lowercase, and biblatex-chicago will automatically do the right thing. Cf. addendum.

number This is a standard biblatex field, containing the number of a journaltitle in an article entry, the number of a title in a periodical entry, or the volume/number of a book in a series. Generally, in an article or periodical entry, this will be a plain cardinal number, but in such entries biblatex-chicago now does the right thing if you have a list or range of numbers (unsigned:ranke). In any book-like entry it may well contain considerably more information, including even a reference to "2nd ser.," for example, while the series field in such an entry will contain the name of the series, rather than a number. This field is also the place for the patent number in a patent entry. Cf. issue and series. (See *Manual* 17.90–95 and boxer:china, palmatary:pottery, wauchope:ceramics; 17.163 and beattie:crime, conley:fifthgrade, friedman:learning, garrett:15, gibbard:15, hlatky:hrt, mcmillen:antebellum, rozner:liberation, warr:ellison.)

NB: This may be an opportune place to point out that the *Manual* (17.129) prefers arabic to roman numerals in most circumstances (chapters, volumes, series numbers, etc.), even when such numbers might be roman in the work cited. The obvious exception is page numbers, in which roman numerals indicate that the citation came from the front matter, and should therefore be retained. Another possible exception is in references to works "with many and complex divisions," in which "a mixture of roman and arabic" may be "easier to disentangle."

options A standard biblatex field, for setting certain options on a per-entry basis rather than globally. Information about some of the more common options may be found above under author and date, and below in section 5.4.3. See creel:house, eliot:pound, emerson:nature, ency:britannica, herwign:office, lecarre:quest, and maitland:canon for examples of the field in use.

organization A standard biblatex field, retained mainly for use in the misc, online, and manual entry types, where it may be of use to specify a publishing body that might not easily fit in other categories. In biblatex, it is also used to identify the organiza-

tion sponsoring a conference in a proceedings or inproceedings entry, and I have retained this as a possibility, though the *Manual* is silent on the matter.

origdate
: This is a standard biblatex field which replaced the obsolete origyear, and which therefore allows more than one full date specification for those references which need to provide more than just one. As with the analogous date field, you provide the date (or range of dates) in ISO8601 format, i.e., yyyy-mm-dd. In most entry types, you would use origdate to provide the date of first publication of a work, most usually needed only in the case of reprint editions, but also recommended by the *Manual* for electronic editions of older works (17.123, 17.146–7; aristotle:metaphy:gr, emerson:nature, james:ambassadors, schweitzer:bach). In both the letter and misc (with entrysubtype) entry types, the origdate identifies when a letter (or similar) was written. In such misc entries, some "non-letter-like" materials (like interviews) need the date field for this purpose, while in letter entries the date applies to the publication of the whole collection. If such a published collection were itself a reprint, judicious use of the pubstate field or perhaps improvisation in the location field might be able to rescue the situation. (See white:ross:memo, white:russ, and white:total for how letter entries can work; creel:house shows the field in action in a misc entry, while spock:interview uses date instead.)

  Because of the importance of date specifications in the author-date style, biblatex-chicago-authordate provides a series of options and automated behaviors to allow you to emphasize the origdate in citations and at the head of entries in the list of references. In entries which have *only* an origdate — usually misc with an entrysubtype — Biber and the default \DeclareLabelyear configuration now make it possible to do without a cmsdate option, as the origdate will automatically appear where and as it should. In entries with both dates you have a choice of which appears where. In some cases it may even be necessary to reverse the two date fields, putting the earlier year in date and the later in origdate. Please see above under **date** for all the details on how these options interact.

  Because the origdate field only accepts numbers, some improvisation may be needed if you wish to include "n.d." (\bibstring{nodate}) in an entry. In letter and misc, this information can be placed in titleaddon, but in other entry types you may need to use the location field.

origlanguage
: In keeping with the *Manual*'s specifications, I have fairly thoroughly redefined biblatex's facilities for treating translations. The origtitle field isn't used, while the language and origdate fields have been press-ganged for other duties. The origlanguage field, for its part, retains a dual role in presenting translations in a list of references. The details of the *Manual*'s suggested treatment when both a translation and an original are cited may be found below under **userf**. Here, however, I simply note that the introductory string used to connect the translation's citation with the original's is "Originally published as," which I suggest may well be inaccurate in a great many cases, as for instance when citing a work from classical antiquity, which will most certainly not "originally" have been published in the Loeb Classical Library. Although not, strictly speaking, authorized by the *Manual*, I have provided another way to introduce the original text, using the origlanguage field, which must be provided *in the entry for the translation, not the original text* (aristotle:metaphy:trans). If you put one of the standard biblatex bibstrings there (enumerated below), then the entry will work properly across multiple languages. Otherwise, just put the name of the language there, localized as necessary, and biblatex-chicago will eschew "Originally published as" in favor of, e.g., "Greek edition:" or "French edition:". This has no effect in citations, where only the work cited — original or translation — will be printed, but it may help to make the *Manual*'s suggestions for the list of references more palatable.

  That was the first usage, in keeping at least with the spirit of the *Manual*. I have also, perhaps less in keeping with that specification, retained some of biblatex's

functionality for this field. If an entry doesn't have a userf field, and therefore won't be combining a text and its translation in the list of references, you can also use origlanguage as Lehman intended it, so that instead of saying, e.g., "translated by X," the entry will read "translated from the German by X." The *Manual* doesn't mention this, but it may conceivably help avoid certain ambiguities in some citations. As in biblatex, if you wish to use this functionality, you have to provide *not* the name of the language, but rather a bibstring, which may, at the time of writing, be one of american, brazilian, danish, dutch, english, french, german, greek, italian, latin, norwegian, portuguese, spanish, or swedish, to which I've added russian.

origlocation   At least one notes & bibliography example in the *Manual* provides a more complete specification of a reprinted book's original publication details than has been possible using previous releases of biblatex-chicago (17.123). It seems reasonable to include this in the author-date style, as well, so starting with this release, you can provide both an origlocation and an origpublisher to go along with the origdate, should you so wish, and all of this information will be printed in the reference list. You can now also use this field in a letter or misc (with entrysubtype) entry to give the place where a published or unpublished letter was written (17.76). (Jonathan Robinson has suggested that the origlocation may in some circumstances actually be necessary for disambiguation, his example being early printed editions of the same material printed in the same year but in different cities. The new functionality should make this simple to achieve. Cf. origdate, origpublisher and pubstate; schweitzer:bach.)

origpublisher   As with the origlocation field just above, this new field allows you to provide fuller original publication details for reprinted books. You can now provide an origpublisher and/or an origlocation in addition to the origdate, and all will be presented in long notes and bibliography. (Cf. origdate, origlocation, and pubstate; schweitzer:bach.)

origyear   This field is, as of biblatex 0.9, obsolete. It is ignored if it appears in a .bib file. Please use origdate instead.

pages   This is the standard biblatex field for providing page references. In many article entries you'll find this contains something other than a page number, e.g. a section name or edition specification (17.188, 17.191, 17.202; kozinn:review, nyt:trevorobit). Of course, the same may be true of almost any sort of entry, though perhaps with less frequency. Curious readers may wish to look at brown:bremer (17.172) for an example of a pages field used to facilitate reference to a two-part journal article. Cf. number for more information on the *Manual*'s preferences regarding the formatting of numerals; bookpagination and pagination provide details about biblatex's mechanisms for specifying what sort of division a given pages field contains; and usera discusses a different way to present the section information pertaining to a newspaper article.

pagination   This, a standard biblatex field, allows you automatically to prefix the appropriate identifying string to information you provide in the postnote field of a citation command, whereas bookpagination allows you to prefix a string to the pages field. Please see **bookpagination** above for all the details on this functionality, as aside from the difference just mentioned the two fields are equivalent.

part   Standard biblatex field, which identifies physical parts of a single logical volume in book-like entries, not in periodicals. It has the same purpose in biblatex-chicago, but because the *Manual* (17.88) calls such a thing a "book" and not a "part," the string printed in the list of references will, at least in English, be "bk." instead of the plain dot between volume number and part number (harley:cartography, lach:asia). This field should only be used in association with a volume number, so if you need to identify "parts" or "books" that are

part of a published series, for example, then you'll need to use a different field, (which in the case of a series would be number [palmatary:pottery]). Cf. volume; iso:electrodoc:15.

publisher Standard biblatex field. Remember that "and" is a keyword for connecting multiple publishers, so if a publisher's name contains "and," then you should either use the ampersand (&) or enclose the whole name in additional braces. (See *Manual* 17.103–114; aristotle:metaphy:gr, cohen:schiff, creasey:ashe:blast, dunn:revolutions.)

There are, as one might expect, a couple of further subtleties involved here. Ordinarily, two publishers will be separated by a forward slash in the list of references, but if a company issues "certain books through a special publishing division or under a special imprint," then the two names will be separated by a comma, which you will need to provide in the publisher field. The *Manual*'s example (17.112) is "Ohio University Press, Swallow Press," which would cause biblatex-chicago no problems. If a book has two co-publishers, "usually in different countries," (17.113) then the simplest thing to do is to choose one, probably the nearest one geographically. If you feel it necessary to include both, then levistrauss:savage demonstrates one way of doing so, using a combination of the publisher and location fields. Finally, if the publisher is unknown, then the *Manual* recommends (17.109) simply using the place (if known) and the date. If for some reason you need to indicate the absence of a publisher, the abbreviation given by the *Manual* is n.p., though this can also stand for "no place." Some style guides apparently suggest using s.n. (= *sine nomine*) to specify the lack of a publisher, but the *Manual* doesn't mention this.

pubstate A standard biblatex field, new to version 0.9. Because the author-date specification has fairly complicated rules about presenting reprinted editions, I have adopted this field as a means of simplifying the problem for users. Instead of hand-formatting in the location field, you can now simply put the string reprint into the pubstate field, and depending on which date you have chosen to appear at the head of the entry, biblatex-chicago-authordate will either print the (localized) string Repr. in the proper place or otherwise provide a parenthesized notice at the end of the entry detailing the original publication date. See under **date** above for the available permutations. (Cf. aristotle:metaphy:gr, maitland:canon, maitland:equity, schweitzer:bach.) If the field contains something other than the word reprint, then it will be treated as in the standard styles, and printed after the publication information. In music entries, its literal contents will always be printed as part of the publication data.

redactor I have implemented this field just as biblatex's standard styles do, even though the *Manual* doesn't actually mention it. It may be useful for some purposes. Cf. annotator and commentator.

reprinttitle **NB: Please note that this feature is in an alpha state, and that I'm contemplating using a different field in the future for this functionality. I include it here in the hope that it might receive some testing in the meantime.** At the request of Will Small, I have included a means of providing the original publication details of an essay or a chapter that you are citing from a subsequent reprint, e.g., a *Collected Essays* volume. In such a case, at least according to the *Manual* (17.73), such details need be provided only if they are "of particular interest." The data would follow an introductory phrase like "originally published as," making the problem strictly parallel to that of including details of a work in the original language alongside the details of its translation. I have addressed the latter problem with the userf field, which provides a sort of cross-referencing method for this purpose, and reprinttitle works in *exactly* the same way. In the .bib entry for the reprint you include a cross-reference to the cite key of the original location using the reprinttitle field (which it may help mnemonically to think of as a "reprinted title" field). The main difference between the two forms

is that userf prints all but the author of the original work, whereas reprinttitle suppresses both the author and the title of the original, giving only the more general details, beginning with, e.g., the journaltitle or booktitle and continuing from there. The string prefacing this information will be "Orig. pub. in." Please see the documentation on userf below for all the details on how to create .bib entries for presenting your data.

series A standard biblatex field, usually just a number in an article, periodical, or review entry, almost always the name of a publication series in book-like entries. If you need to attach further information to the series name in a book-like entry, then the number field is the place for it, whether it be a volume, a number, or even something like "2nd ser." or "\bibstring{oldseries}." Of course, you can also use \bibstring{oldseries} or \bibstring{newseries} in an article entry, but there you would place it in the series field itself. (In fact, the series field in article and periodical entries is one of the places where biblatex allows you just to use the plain bibstring oldseries, for example, rather than making you type \bibstring{oldseries}. The type field in manual, patent, report, and thesis entries also has this auto-detection mechanism in place; see the discussion of \bibstring below for details.) In whatever entry type, these bibstrings produce the required abbreviation. (For books and similar entries, see *Manual* 17.90– 95; boxer:china, browning:aurora, palmatary:pottery, plato:republic:gr, wauchope:ceramics; for periodicals, see 17.178; garaud:gatine, sewall:letter.) Cf. number for more information on the *Manual*'s preferences regarding the formatting of numerals.

shortauthor This is a standard biblatex field, but biblatex-chicago makes considerably greater use of it than the standard styles. For the purposes of the author-date specification, the field provides the name to be used in text citations. In the vast majority of cases, you don't need to specify it, because the biblatex system selects the author's last name from the author field and uses it in such a reference, and if there is no author it will search namea, editor, nameb, translator, and namec, in that order. The current versions of biblatex and biber will now automatically alphabetize by any of these names if they appear at the head of an entry. If, in an author-less article entry (entrysubtype magazine), you allow biblatex-chicago to use the title of the periodical as the author — the default behavior — then your shortauthor field can optionally contain an abbreviated form of the periodical name, formatted appropriately, which usually means something like "\mkbibemph{Abbrev. Period. Title}" (gourmet:052006, lakeforester:pushcarts, nyt:trevorobit, unsigned:ranke). Indeed, with long, institutional authors, a shortened version in shortauthor may save space in the running text (cotton:manufacture, evanston:library). See just below under **shorthand** for another method of saving space.

As mentioned under editortype, the *Manual* (17.41) recommends against providing the identifying string (e.g., ed. or trans.) in text citations, and biblatex-chicago follows their recommendation. If you need to provide these strings in such a citation, then you'll have to do so by hand in the shortauthor field, or in the shorteditor field, whichever you are using.

shorteditor Like shortauthor, a field to provide a name for a text citation, in this case for, e.g., a collection entry that typically lacks an author. The shortauthor field works just as well in most situations, but if you have set useauthor=false (and not useeditor=false) in an entry's options field, then only shorteditor will be recognized. Cf. editortype, above.

shorthand This is biblatex's mechanism for using abbreviations in citations. For biblatex-chicago-authordate I have modified it somewhat to conform to the needs of the specification, though there is a package option to revert the behavior to something closer to the biblatex standard — see under cmslos in section 5.4.2. The main problem when presenting readers with an abbreviation is to ensure that

they know how to expand it. In the notes & bibliography style this is accomplished with a notice in the first footnote citing a given work, which explains that henceforth the abbreviation will be used instead, and also, if needed, with a list of shorthands that summarizes all the abbreviations used in a particular text. The first part of this system isn't available in the author-date style of citation, and indeed these citations are in themselves already highly-abbreviated keys to the fuller information to be found in the list of references. There are cases, however, particularly when institutions or journaltitles appear as authors, when you may feel the need to provide a shortened version for citations. I have already discussed one option available to you just above (cf. **shortauthor**), but for this to work the abbreviation must either be instantly recognizable to your readership or at least easily parseable by them.

The *Manual's* suggestion, particularly when "long names are cited several times" (17.47), is to provide an abbreviation which is then explained by an alphabetized cross-reference inside the list of references itself. In this release of biblatex-chicago, I have reclaimed one of the custom entry types (**customc**) to implement exactly this system. See the explanation of this entry type above, but basically you can put the abbreviation itself in the author field and its expansion in the title field, then use either \nocite or a userc field to ensure the entry appears in the list of references. (Cf. abbrev:BSI, abbrev:ISO, bsi:abbreviation:15, iso:electrodoc:15.)

The author-date style will still automatically print the cross-reference in the list of shorthands too, as in standard biblatex, if the \printshorthands command appears in your document. You can place skiplos in the options field to exclude a particular entry from the list of shorthands if you do decide to

New!   print that list, giving maximum flexibility. Indeed, for this release, I have provided two new options to add to this flexibility. First, I have included two new bibenvironments for use with the env option to the \printshorthands command: losnotes is designed to allow a list of shorthands to appear inside footnotes, while losendnotes does the same for endnotes. Their main effect is to change the font size, and in the latter case to clear up some spurious punctuation and white space that I see on my system when using endnotes. (You'll probably also want to use the option heading=none in order to get rid of the [oversized] default, providing your own within the \footnote command.) Second, I have provided a new package option, shorthandfull, which prints entries in the list of shorthands which contain full bibliographical information, effectively allowing you to eschew the list of references in favor of a fortified shorthand list. This option will only work if used in tandem with cmslos=false, as the whole functionality seems to me closely related to the more standard ways of presenting shorthands. (See 16.39–40, and also biblatex.pdf for more information.)

As I mentioned above under **crossref**, extra care is needed when using shorthands with cross-references, and I would avoid them in all parent entries, at least in the current state of biblatex-chicago.

shorttitle   A standard biblatex field, primarily used to provide an abbreviated title for citation styles that need one. In biblatex-chicago-authordate such a field will be necessary only very rarely (unlike in the notes & bibliography style), and is most likely to turn up in inreference or reference entries (where the title takes the place of the author), or in any sort of entry with a classical entrysubtype. This latter toggle makes citations use author and title instead of author and year, and if an abbreviated version of that title would save space in your running text this is the field where you can provide it. (Cf. ency:britannica, grove:sibelius, aristotle:metaphy:gr.)

sortkey   A standard biblatex field, designed to allow you to specify how you want an entry alphabetized in a list of references. In general, if an entry doesn't turn up where you expect or want it, this field should provide the solution. More par-

ticularly, entries with a corporate author beginning with the definite or indefinite article will usually require your assistance in this way (cotton:manufacture, grove:sibelius). The default settings of \DeclareSortingScheme now include the three supplemental name fields (name[a-c]) and also the journaltitle in the sorting algorithm, so you should find these algorithms needing less help than before. There may be circumstances — several reprinted books by the same author, for example — when the **sortyear** field is more appropriate, on which see below. Lehman also provides **sortname** and **sorttitle** for equally fine-grained control. Please consult biblatex.pdf for the details.

sortyear A standard biblatex field, provided by Lehman for more fine-grained control over the sorting of entries in a list of references, and possibly useful in biblatex-chicago-authordate to help present several reprinted books by the same author. See sortkey above and maitland:equity.

subtitle The subtitle for a title — see next entry.

title In the vast majority of cases, this field works just as it always has in BibTEX, and just as it does in biblatex. Nearly every entry for the author-date specification will have such a field, any exceptions likely stemming from the need to re-use a database for the notes & bibliography style. Aside from this, the main source of difficulties flows from the *Manual*'s rules for formatting titles, rules which also hold for booktitles and maintitles. The whole point of using a BibTEX-based system is for it to do the formatting for you, and in most cases biblatex-chicago-authordate does just that, capitalizing them sentence-style, italicizing them, and sometimes both. There are two situations that require user intervention. First, in titles that take sentence-style capitalization, you need, as always in traditional BibTEX, to assist the algorithms by placing anything that needs to remain capitalized within an extra pair of curly braces. Second, when a title is quoted within a title, you need to know some of the rules of the Chicago style. A summary here should serve to clarify them, and help you to understand when biblatex-chicago-authordate might need your help in order to comply with them.

With regard to sentence-style capitalization, the rules of the Chicago author-date style are fairly simple:

Headline Style: journaltitle in all types, series in all book-like entries (i.e., not in articles), and title in periodical entries.

Sentence Style: Every other title, *except* in letter entries and in misc entries with an entrysubtype. Also, the booktitle, issuetitle, and maintitle in all entry types.

Contextual Capitalization of First Word: titleaddon, booktitleaddon, maintitleaddon in all entry types, and the title of misc entries with an entrysubtype.

Plain: title in letter entries.

What this means in practice is that to get a title like *The Chicago manual of style*, your .bib entry needs to have a field that looks something like this:

```
title = {The {Chicago} Manual of Style}
```

This is completely straightforward, but remember that if an article has a title like: Review of *The Chicago manual of style*, then the curly braces enclosing material to be formatted in italics will cause the capitalization algorithm to stop and leave all of that material as it is, so your .bib entry would need to have a field something like this:

```
title = {\bibstring{reviewof} \mkbibemph{The Chicago manual
of style}}
```

(As an aside, the use of the `reviewof` bibstring isn't strictly necessary here, but it helps with portability across languages and across the two Chicago styles. If you've noticed a lot of lowercase letters starting fields in dates-test.bib, they're present because in the notes & bibliography style capitalization is complicated by notes using commas where the bibliography uses periods, and words like "review" start in uppercase only if the context demands it. There's considerably less of this in the author-date style [note the *titleaddon fields], but it still pays to be aware of the issue.)

With regard to italics, the rules of biblatex-chicago-authordate are as follows:

> **Italics:** booktitle, maintitle, and journaltitle in all entry types; title of artwork, book, bookinbook, booklet, collection, inbook, manual, misc (with no entry-subtype), periodical, proceedings, report, suppbook, and suppcollection entry types.

> **Main Text Font (Roman):** title of article, image, incollection, inproceedings, letter, misc (with an entrysubtype), online, patent, periodical, suppperiodical, thesis, and unpublished entry types, issuetitle in article and periodical entry types. booktitleaddon, maintitleaddon, and titleaddon in all entry types.

> **Italics or Roman:** All of the audiovisual entry types — audio, music, and video — have to serve as analogues both to book and to inbook. Therefore, if there is both a title and a booktitle, then the title will be in the main text font. If there is no booktitle, then the title will be italicized.

Now, the rules for which entry type to use for which sort of work tend to be fairly straightforward, but in cases of doubt you can consult section 5.1 above, the examples in dates-test.bib, or go to the *Manual* itself, 8.164–210. Assuming, then, that you want to present a title within a title, and you know what sort of formatting each of the two would, on its own, require, then the following rules apply:

1. Inside an italicized title, all other titles are enclosed in quotation marks and italicized, so in such cases all you need to do is provide the quotation marks using `\mkbibquote`, which will take care of any following punctuation that needs to be brought within the closing quotation mark(s) (17.58; donne:var:15, mchugh:wake:15).

2. Inside a plain-text title, you should present another title as it would appear if it were on its own, so in such cases you'll need to do the formatting yourself, using `\mkbibemph` or `\mkbibquote`. (See 17.157; barcott:review:15, garrett:15, gibbard:15, loften:hamlet, loomis:structure:15, murphy:silent:15, osborne:poison, ratliff:review:15, unsigned:ranke, white:callimachus.)

The *Manual* provides a few more rules, as well. A word normally italicized in text should also be italicized in a plain-text title, but should be in roman ("reverse italics") in an italicized title. A quotation used as a (whole) title (with or without a subtitle) retains its quotation marks when it is plain, but loses them when it is italicized (17.60, 17.157; lewis:15). A word or phrase in quotation marks, but that isn't a quotation, retains those marks in all title types (kimluu:diethyl:15).

Finally, please note that in all review (and suppperiodical) entries (if you happen to be using those), and in misc entries with an entrysubtype, and only in those entries, biblatex-chicago-authordate will automatically capitalize the first word of the title after sentence-ending punctuation, assuming that such a title begins with a lowercase letter in your .bib database. See **\autocap** below for more details.

titleaddon Standard biblatex intends this field for use with additions to titles that may need to be formatted differently from the titles themselves, and biblatex-chicago uses

it in just this way, with the additional wrinkle that it can, if needed, replace the title entirely, and this in, effectively, any entry type, providing a fairly powerful, if somewhat complicated, tool for getting BibTeX to do what you want (cf. centinel:letters). This field will always be unformatted, that is, neither italicized nor placed within quotation marks, so any formatting you may need within it you'll need to provide manually yourself. The single exception to this rule is when your data begins with a word that would ordinarily only be capitalized at the beginning of a sentence, in which case you need then simply ensure that that word is in lowercase, and biblatex-chicago will automatically do the right thing. See **\autocap**, below. (Cf. brown:bremer, osborne:poison:15, reaves:rosen, and white:ross:memo for examples where the field starts with a lowercase letter; morgenson:market provides an example where the titleaddon field, holding the name of a regular column in a newspaper, is capitalized, a situation that is handled as you would expect.)

translator As far as possible, I have implemented this field as biblatex's standard styles do, but the requirements specified by the *Manual* present certain complications that need explaining. Lehman points out in his documentation that the translator field will be associated with a title, a booktitle, or a maintitle, depending on the sort of entry. More specifically, biblatex-chicago associates the translator with the most comprehensive of those titles, that is, maintitle if there is one, otherwise booktitle, otherwise title, if the other two are lacking. In a large number of cases, this is exactly the correct behavior (adorno:benj, centinel:letters, plato:republic:gr, among others). Predictably, however, there are numerous cases that require, for example, an additional translator for one part of a collection or for one volume of a multi-volume work. For these cases I have provided the nameb field. You should format names for this field as you would for author or editor, and these names will always be associated with the title (euripides:orestes).

I have also provided a namea field, which holds the editor of a given title (euripides:orestes). If namea and nameb are the same, biblatex-chicago will concatenate them, just as biblatex already does for editor, translator, and namec (i.e., the compiler). Furthermore, it is conceivable that a given entry will need separate translators for each of the three sorts of title. For this, and for various other tricky situations, there is the \parttrans macro (and its siblings), designed to be used in a note field or in one of the titleaddon fields (ratliff:review:15). (Because the strings identifying a translator differ in notes and bibliography, one can't simply write them out in such a field when using the notes & bibliography style, but you can certainly do so in the author-date style, if you wish. Using the macros will make your .bib file more portable across both Chicago specifications, and also across multiple languages, but they are otherwise unnecessary. [See section 6].)

Finally, as I detailed above under **author**, in the absence of an author or an editor, the translator will be used at the head of an entry (silver:gawain), and the reference list entry alphabetized by the translator's name, behavior that can be controlled with the usetranslator switch in the options field. Cf. author, editor, namea, nameb, and namec.

type This is a standard biblatex field, and in its normal usage serves to identify the type of a manual, patent, report, or thesis entry. Biblatex implements the possibility, in some circumstances, to use a bibstring without inserting it in a \bibstring command, and in these entry types the type field works this way, allowing you simply to input, e.g., patentus rather than \bibstring{patentus}, though both will work. (See petroff:impurity; herwign:office, murphy:silent:15, and ross:thesis all demonstrate how the type field may sometimes be automatically set in such entries by using one of the standard entry-type aliases).

Another use for the field is to generalize the functioning of the suppbook entry type, and of its alias suppcollection. In such entries, the type field can spec-

ify what sort of supplemental material you are citing, e.g., "preface to" or "postscript to." Cf. suppbook above for the details. (See *Manual* 17.74–75; polakow:afterw, prose:intro).

You can also use the type field in artwork, audio, image, music, and video entries to identify the medium of the work, e.g., oil on canvas, albumen print, compact disc, or MPEG. If the first word in this field would normally only be capitalized at the beginning of a sentence, then leave it in lowercase in your .bib file and biblatex will automatically do the right thing in citations. Cf. artwork, audio, image, music, and video, above, for all the details. (See auden:reading:15, bedford:photo, cleese:holygrail, leo:madonna, nytrumpet:art:15.)

url   Standard biblatex field, it holds the url of an online publication, though you can provide one for all entry types. The required LaTeX package url will ensure that your documents format such references properly, in the text and in the reference apparatus.

urldate   Standard biblatex field, it identifies exactly when you accessed a given url. This field would contain the whole date, in ɪso8601 format (evanston:library, grove:sibelius, hlatky:hrt, osborne:poison:15, sirosh:visualcortex, wikiped:bibtex). In the default setting of \DeclareLabelyear, any entry without a date, eventdate, or origdate will now use the urldate to find a year for citations and the list of references (grove:sibelius, wikiped:bibtex). Please note that the **urlday**, **urlmonth**, and **urlyear** fields are all now obsolete.

usera   A supplemental biblatex field which functions in biblatex-chicago almost as a "journaltitleaddon" field. In article and periodical entries with entrysubtype magazine, the contents of this field will be placed, unformatted and between commas, after the journaltitle and before the date. The main use is for identifying the broadcast network when you cite a radio or television program (bundy:macneil), though you may also want to use it to identify the section of a newspaper in which you've found a particular article (morgenson:market). (See *Manual* 17.190, 17.207. As far as I can work out, newspaper section information may be placed either before the date [usera] or after it [pages]. Cp. kozinn:review [17.202] and morgenson:market [17.190]. The choice would appear to be yours.)

userc   I have now implemented this supplemental biblatex field as part of the Chicago author-date style's handling of the shorthand field and other cross-references within the list of references. (The "c" part is meant as a sort of mnemonic for this latter, general function, though its main use will probably be in association with the former.) If you use the **customc** entry type to include alphabetized expansions of shorthands in the reference list, or indeed to provide cross-references of any sort to separate entries in that list, it is unlikely that you will cite the customc entry itself in the body of your text. Therefore, in order for it to appear in the reference list, you have two choices. You can either include the entry key of the customc entry in a \nocite command inside your document, or you can place that entry key in the userc field of the .bib entry that actually uses the shorthand. In the latter case, biblatex-chicago will call \nocite for you when you cite the main entry. (See 17.39–40,47; abbrev:BSI, abbrev:ISO, bsi:abbreviation:15, iso:electrodoc:15.)

usere   Another supplemental biblatex field, which biblatex-chicago uses specifically to provide a translated title of a work, something that may be needed if you deem the original language unparseable by a significant portion of your likely readership. The *Manual* offers two alternatives in such a situation: either you can translate the title and use that translation in your title field, providing the original language in language, or you can give the original title in title and the translation in usere. Cf. **language**, above. (See 17.65–67, 17.166, 17.177; kern, pirumova:russian, weresz.)

userf This is the last of the supplemental fields which biblatex provides, used by biblatex-chicago for a very specific purpose. When you cite both a translation and its original, the *Manual* (17.66) recommends that, in a reference list at least, you combine references to both texts in one entry. Lacking specific instructions about the author-date style, I have nonetheless chosen to implement this possibility also for a list of references, though in-text citations will still only refer to individual works. In order to follow this specification, I have provided a third cross-referencing system (the others being crossref and xref), and have chosen the name userf because it might act as a mnemonic for its function.

In order to use this system, you should start by entering both the original and its translation into your .bib file, just as you normally would. The mechanism works for any entry type, and the two entries need not be of the same type. In the entry for the *translation*, you put the cite key of the original into the userf field. In the *original's* entry, you need to include some means of preventing it appearing separately in the list of references, either a toggle in the keywords field or perhaps `skipbib` in the options field. In this standard case, the data for the translation will be printed first, followed by the string `orig. pub. as`, followed by the original, author omitted (furet:passing:eng, furet:passing:fr). As explained above (**origlanguage**), I have also included a way to modify the string printed before the original. In the entry for the *translation*, you put the original's language in origlanguage, and instead of `originally published as`, you'll get `French edition:` or `Latin edition:`, etc. (aristotle:metaphy:gr, aristotle:metaphy:trans).

venue Standard biblatex offers this field for use in proceedings and inproceedings entries, but I haven't yet implemented it, mainly because the *Manual* has nothing to say about it. Perhaps the organization field could be used, for the moment, instead. Anything in a venue field will be ignored.

version Standard biblatex field, currently only available in misc and patent entries in biblatex-chicago.

volume Standard biblatex field. It holds the volume of a journaltitle in article entries, and also the volume of a multi-volume work in many other sorts of entry. Cf. part; conway:evolution shows how sometimes this field may hold series information, as well.

volumes Standard biblatex field. It holds the total number of volumes of a multi-volume work, and in such references you should provide the volume and page numbers in the postnote field of the relevant \cite command, e.g.:

```
\autocite[3:25]{bibfile:key}.
```

Cf. 16.110; meredith:letters, tillich:system, weber:saugetiere, wright:evolution. The entry wright:theory presents one volume of such a multi-volume work, so you would no longer need to give the volume in any postnote field when citing it.

xref A modified crossref field provided by biblatex. See **crossref**, above.

year Standard biblatex field, especially important for the author-date specification. Please see all the details under **date** above. Unlike the date field year allows non-numeric input, so you can put \bibstring{nodate} here if required, or indeed any other sort of non-numerical date information. If you can guess the date then you can include that guess in square brackets instead of \bibstring{nodate}. Cf. bedford:photo, clark:mesopot, ross:leo, thesis:madonna.

5.3 Commands

In this section I shall attempt to document all those commands you may need when using biblatex-chicago-authordate that I have either altered with respect to the standard provided by biblatex or that I have provided myself. Some of these, unfortunately, will make your .bib file incompatible with other biblatex styles, but I've been unable to avoid this. Any ideas for more elegant, and more compatible, solutions will be warmly welcomed.

5.3.1 Formatting Commands

These commands allow you to fine-tune the presentation of your references in both citations and list of references. You can find many examples of their usage in dates-test.bib, and I shall try to point you toward a few such entries in what follows. **NB:** biblatex's \mkbibquote command is now mandatory in some situations. See its entry below.

\autocap Version 0.8 of biblatex introduced the \autocap command, which capitalizes a word inside a citation or list of references entry if that word follows sentence-ending punctuation, and leaves it lowercase otherwise. The whole question of capitalization is considerably more complicated in the notes & bibliography style, where the former uses commas and the latter (often) periods to separate blocks of information, whereas the more streamlined author-date specification has few such issues. In dates-test.bib there are only two places where the \autocap macro is necessary, and they both involve the string forthcoming in the year field (author:forthcoming, contrib:contrib).

I have nonetheless retained the system developed, following Lehman's example, for the notes & bibliography style, which automatically tracks the capitalization of certain fields in your .bib file. I chose these fields after a non-scientific survey of entries in my own databases, so of course if you have ideas for the extension of this facility I would be most interested to hear them. In order to take advantage of this functionality, all you need do is begin the data in the appropriate field with a lowercase letter, e.g., note = {with the assistance of X}. If the data begins with a capital letter — and this is not infrequent — that capital will always be retained. (cf., e.g., creel:house, morgenson:market.) If, on the other hand, you for some reason need such a field always to start with a lowercase letter, then you can try using the \isdot macro at the start, which turns off the mechanism without printing anything itself. Here, then, for reference purposes, is the complete list of fields where this functionality is active:

1. The **addendum** field in all entry types.

2. The **booktitleaddon** field in all entry types.

3. The **edition** field in all entry types. (Numerals work as you expect them to here.)

4. The **maintitleaddon** field in all entry types.

5. The **note** field in all entry types.

6. The **shorttitle** field in the review (suppperiodical) entry type and in the misc type, in the latter case, however, only when there is an entrysubtype defined, indicating that the work cited is from an archive.

7. The **title** field in the review (suppperiodical) entry type and in the misc type, in the latter case, however, only when there is an entrysubtype defined, indicating that the work cited is from an archive.

8. The **titleaddon** field in all entry types.

9. The **type** field in artwork, audio, image, music, suppbook, suppcollection, and video entry types.

If you accidentally use the \autocap macro in one of the above fields, it frankly shouldn't matter at all, and you'll still get what you want, but taking advantage of the automatic provisions should at least save some typing.

\bibstring This is Lehman's very powerful mechanism to allow biblatex automatically to provide a localized version of a string, and to determine whether that string needs capitalization, depending on where it falls in an entry. Biblatex also provides functionality which allows you sometimes simply to input, for example, newseries instead of \bibstring{newseries}, the package auto-detecting when a bibstring is involved and doing the right thing, though in all such cases either form will work. This functionality is available in the series field of article, periodical, and review entries; in the type field of manual, patent, report, and thesis entries; in the location field of patent entries; in the language field in all entry types; and in the nameaddon field in customc entries. These are the places, as far as I can make out, where biblatex's standard styles support this feature, though I have added the last, style-specific, one. If Lehman generalizes it still further in a future release, I shall do the same, if possible.

\mkbibquote This is the standard biblatex command, which requires attention here because it is a crucial part of the mechanism of Lehman's "American" punctuation system. No titles in the author-date system require quotation marks, but titles-within-titles frequently do, so it is best to get accustomed to using this command to make sure any periods or commas appearing in the neighborhood of the closing quotes will appear inside them automatically. A few examples from datestest.bib should help to clarify this.

In an article entry, the title contains a quoted phrase:

```
title = {Diethylstilbestrol and Media Coverage of the
    \mkbibquote{morning after} Pill}
```

Here, because the quoted text doesn't come at the end of title, and no punctuation will ever need to be drawn within the closing quotation mark, you could instead use \enquote{morning after} or even "morning after". (Note the double quotation marks here — the other two methods have the virtue of taking care of nesting for you.) All of these will produce the formatted: Diethylstilbestrol and media coverage of the "morning after" pill.

Here, by contrast, is a book title:

```
title = {Annotations to \mkbibquote{Finnegans wake}}
```

Because the quoted title within the title comes at the end of the field, and because this reference unit will be separated from what follows by a period in the list of references, then the \mkbibquote command is necessary to bring that period within the final quotation marks, like so: *Annotations to "Finnegans wake."*

Note in both cases how you need to be careful with the sentence-style capitalization inside the curly brackets. The automatic algorithms assume anything inside the brackets doesn't need alteration, so you need to provide lower- or uppercase as they should appear in the list of references.

Let me also add that this command interacts well with Lehman's csquotes package, which I highly recommend, though the latter isn't strictly necessary in texts using an American style, to which biblatex defaults when csquotes isn't loaded.

\partcomp This and the following 6 macros were all designed to help biblatex-chicago cope with the fact that many bibstrings in the notes & bibliography style differ between notes and bibliography, the former sometimes using abbreviated forms when the latter prints them in full. These problems do not arise in the author-date style, but using these macros will make your .bib database more portable across languages and across both Chicago styles, and may be slightly easier to

remember than the strings themselves. On the other hand, of course, they will make your .bib file less portable across multiple biblatex styles.

These macros allow you to provide an `editor`, a `translator`, and/or a `compiler` in situations where the available fields (editor, namea, translator, nameb, and namec) aren't adequate. Their names all begin with \part, as originally I intended them for use when a particular name applied only to a specific title, rather than to a maintitle or booktitle (cf. **namea** and **nameb**, above).

In the present instance, you can use \partcomp to identify a compiler when namec (or editortype) won't do, e.g., in a note field or the like. In such a case, biblatex-chicago will print the appropriate string in your references.

\partedit Use this macro when identifying an editor whose name doesn't conveniently fit into the usual fields (editor or namea). (N.B.: If you are writing in French and using cms-french.lbx, then currently you'll need to add either de or d' after this command in your .bib files to make the references come out right. I'm working on this.) See howell:marriage.

\partedit-andcomp As before, but for use when an editor is also a compiler.

\partedit-andtrans As before, but for when when an editor is also a translator (ratliff:review:15).

\partedit-transandcomp As before, but for when an editor is also a translator and a compiler.

\parttrans As before, but for use when identifying a translator whose name doesn't conveniently fit into the usual fields (translator and nameb).

\parttrans-andcomp As before, but for when a translator is also a compiler.

5.3.2 Citation Commands

The biblatex package is particularly rich in citation commands, most of which, in biblatex-chicago-authordate, function as they do in the standard author-date styles. If you are getting unexpected behavior when using them please have a look in your .log file. A command like \supercite, listed in § 3.6.2 of the biblatex manual but not defined by biblatex-chicago-authordate or by core biblatex, defaults to \cite, and leaves a warning in the .log. The following commands may require some minimal explanation, but if there are standard commands that don't work for you, or new commands that would be useful, please let me know, and it should be possible to fix or add them.

\autocite I haven't adapted this in the slightest, but I thought it worth pointing out that biblatex-chicago-authordate sets this command to use \parencite as the default option. It is, in my experience, much the most common citation command you will use, and also works fine in its multicite form, **\autocites**.

\textcite In standard biblatex this command searches first for a labelname, usually taken from the author or shortauthor field, then uses the shorthand field if the former doesn't exist. Because of the way the Chicago author-date specification recommends handling abbreviations, I have switched this around, and the command now searches for a shorthand first. This holds also for the multicite form **\textcites**, though both commands revert to their standard biblatex behavior when you give the cmslos=false option in the preamble.

5.4 Package Options

5.4.1 Pre-set biblatex Options

Although a quick glance through biblatex-chicago.sty will tell you which biblatex options the package sets for you, I thought I might gather them here also for

your perusal. These settings are, I believe, consistent with the specification, but you can alter them in the options to biblatex-chicago in your preamble or by loading the package using \usepackage[style=chicago-authordate]{biblatex}, which gives you the biblatex defaults unless you redefine them yourself inside the square brackets.

autocite= inline Biblatex-chicago-authordate places references in footnotes by default.

citetracker= true The citetracker for the \ifciteseen test is enabled globally.

alldates=comp The specification calls for the long format when presenting dates, slightly shortened when presenting date ranges. Please note that because of the author-date style's complicated requirements with respect to dates, there will be cases when printed ranges don't look exactly right — cf., e.g., nass:address. I'm working on this.

ibidtracker= constrict This enables an *ibidem* mechanism in citations, but only in the most strictly-defined circumstances. The Chicago author-date style doesn't print "Ibid" in citations, but in general a repeated citation on the same page will print only the page reference. Technically, this should only occur when a source is cited "more than once in one paragraph" (16.114), so you can use the \citereset command from biblatex to achieve the greatest compliance, as the package only offers automatic resetting on part, chapter, section, and subsection boundaries, while biblatex-chicago automatically resets the tracker at page breaks. (Cf. biblatex.pdf §3.1.2.1.) Whenever there might be any ambiguity, biblatex should default to printing a more informative reference.

If you are going to repeat a source, make sure that the cite command provides a postnote — if you don't need to cite a specific page, then it's better only to use one citation rather than two, as otherwise, in the current state of the code, you'll get empty parentheses, like so: ().

labelyear= true This option tells biblatex to provide the special labelyear and extrayear fields for author-date styles.

maxbibnames =10
minbibnames =7 These two options are new, and control the number of names printed in the list of references when that number exceeds 10. These numbers follow the recommendations of the *Manual* (17.29–30), and they are different from those for use in citations. With biblatex 1.6 and later you can no longer redefine maxnames and minnames in the \printbibliography command at the bottom of your document, so biblatex-chicago now does this automatically for you, though of course you can change them in your document preamble. Please see section 5.5.2 below (and the file cms-dates-sample.pdf) for hints on dealing with entries with more than three authors.

pagetracker= true This enables page tracking for the \iffirstonpage and \ifsamepage commands for controlling, among other things, the *ibidem* mechanism. It tracks individual pages if LaTeX is in oneside mode, or whole spreads in twoside mode.

punctfont= true This fixes a minor problem with punctuation in titles, ensuring that the colon between a title and a subtitle appears in the correct, matching font.

sortcase= false This turns off the sorting of uppercase and lowercase letters separately, a practice which the *Manual* doesn't appear to recommend.

sorting=cms This setting, new in this release, takes advantage of the \DeclareSortingScheme command provided by biblatex and biber, in effect implementing a default sorting order in the list of references tailored to comply with the Chicago author-date specification. Please see the documentation of \DeclareSortingScheme in section 5.4.1, below.

uniquelist= minyear This enables biblatex-chicago-authordate to disambiguate entries which have more than three authors, but which differ *after* the first name in the list. This will only occur when two such entries have the same year (16.118). The option is Biber-

only, like the following, which means that this next-generation BibTeX replacement is now required for the author-date style. Please see cms-dates-sample.pdf and section 5.5.2, below, for further details.

uniquename=
minfull

This enables the package to distinguish different authors who share a surname, using initials in the first instance, and whole names if initials aren't enough (16.108). The option is now Biber-only, like the previous one.

usetranslator
=true

This enables automatic use of the translator at the head of entries in the absence of an author or an editor. In the list of references, the entry will be alphabetized by the translator's surname. You can disable this functionality on a per-entry basis by setting usetranslator=false in the options field. Cf. silver:gawain.

Other biblatex Formatting Options

I've chosen defaults for many of the general formatting commands provided by biblatex, including the vertical space between items in the list of references and between items in the list of shorthands (\bibitemsep and \lositemsep). I define many of these in biblatex-chicago.sty, and of course you may want to redefine them to your own needs and tastes. It may be as well you know that the *Manual* does state a preference for two of the formatting options I've implemented by default: the 3-em dash as a replacement for repeated names in the list of references (16.103–106); and the formatting of note numbers, both in the main text and at the bottom of the page / end of the essay (superscript in the text, in-line in the notes; 16.25). The code for this last formatting is also in biblatex-chicago.sty, and I've wrapped it in a test that disables it if you are using the memoir class, which I believe has its own commands for defining these parameters. You can also disable it by using the footmarkoff package option, on which see below.

Gildas Hamel pointed out that my default definition, in biblatex-chicago.sty, of biblatex's \bibnamedash didn't work well with many fonts, leaving a line of three dashes separated by gaps. He suggested an alternative, which I've adopted, with a minor tweak to make the dash thicker, though you can toy with all the parameters to find what looks right with your chosen font. The default definition is: \renewcommand*{\bibnamedash}{\rule[.4ex]{3em}{.6pt}}.

losnotes &
losendnotes

With this release, and at the request of Kenneth Pearce, I have added two new bibenvironments to chicago-authordate.bbx, for use with the env option to the \printshorthands command. The first, losnotes, is designed to allow a list of shorthands to appear inside footnotes, while losendnotes does the same for endnotes. Their main effect is to change the font size, and in the latter case to clear up some spurious punctuation and white space that I see on my system when using endnotes. (You'll probably also want to use the option heading=none in order to get rid of the [oversized] default, providing your own within the \footnote command.) Please see the documentation of shorthand in section 5.2 above for further options available to you for presenting and formatting the list of shorthands.

The next-generation backend Biber offers enhanced functionality in many areas, two of which I've implemented in this release. If the default definitions don't work well for you, you can redefine all of them in your document preamble — see biblatex.pdf §§4.5.1 and 4.5.2.

\Declare-
Labelname

This option allows you to add name fields for consideration when biblatex is attempting to find a shortened name for in-text citations. This, for example, allows a compiler (=namec) to appear in citations without any other intervention from the user, rather than requiring a shortauthor field as previous releases of biblatex-chicago did. The default definition currently is {shortauthor,author, shorteditor,namea,editor,nameb,translator,namec}.

\Declare-
SortingScheme

The third Biber enhancement I have implemented allows you to include almost any field whatsoever in biblatex's sorting algorithms for the list of references, so

that a great many more entries will be sorted correctly automatically rather than requiring manual intervention in the form of a sortkey field or the like. Code in biblatex-chicago.sty sets the biblatex option `sorting=cms`, which is a custom scheme, basically a Chicago-specific variant of the default nyt. You can find its definition in chicago-authordate.cbx.

The advantages of this scheme are, specifically, that any entry headed by one of the supplemental name fields (name[a-c]), a manual entry headed by an organization, or an article or review entry headed by a journaltitle will no longer need a sortkey set. The main disadvantage should only occur very rarely, and appears because the supplemental name fields are treated differently from the standard name fields by biblatex. Ordinarily, you can set, for example, `useauthor=false` in the options field to remove the author's name from consideration for sorting purposes. The Chicago-specific option usecompiler=false, however, doesn't remove namec from such consideration, so in some rare corner cases you may need a sortkey.

5.4.2 Pre-set chicago Options

bookpages= true
At the request of Scot Becker, I have included this rather specialized option, which controls the printing of the pages field in book entries. Some bibliographic managers, apparently, place the total page count in that field by default, and this option allows you to stop the printing of this information in the reference list. It defaults to true, which means the field is printed, but it can be set to false either in the preamble, for the whole document, or on a per-entry basis in the options field (though rather than use this latter method it would make sense to eliminate the pages field from the affected entries).

doi=true
This option controls whether any doi fields present in the .bib file will be printed in the reference list. It defaults to true, and can be set to false either in the preamble, for the whole document, or on a per-entry basis, in the options field.

eprint=true
This option controls whether any eprint fields present in the .bib file will be printed in the list of references. It defaults to true, and can be set to false either in the preamble, for the whole document, or on a per-entry basis, in the options field. In online entries, the eprint field will always be printed.

isbn=true
This option controls whether any isan, isbn, ismn, isrn, issn, and iswc fields present in the .bib file will be printed in the list of references. It defaults to true, and can be set to false either in the preamble, for the whole document, or on a per-entry basis, in the options field.

numbermonth= true
Once again at the request of Scot Becker, I have included this option, which controls the printing of the month field in all the periodical-type entries when a number field is also present. Some bibliographic software, apparently, always includes the month of publication even when a number is present. When all this information is available the *Manual* (17.181) prints everything, so this option defaults to true, which means the field is printed, but it can be set to false either in the preamble, for the whole document, or on a per-entry basis in the options field.

url=true
This option controls whether any url fields present in the .bib file will be printed in the reference list. It defaults to true, and can be set to false either in the preamble, for the whole document, or on a per-entry basis, in the options field. Please note that, as in standard biblatex, the url field is always printed in online entries, regardless of the state of this option.

includeall= true
This is the one option that rules the six preceding, either printing all the fields under consideration — the default — or excluding all of them. It is set to `true` in chicago-authordate.cbx, but you can change it either in the preamble for the whole document or in the options field of individual entries. The rationale for all of these options is the availability of bibliographic managers that helpfully present as much data as possible, in every entry, some of which may not be felt

to be entirely necessary. Setting `includeall` to `true` probably works just fine for those compiling their .bib databases by hand, but others may find that some automatic pruning helps clear things up, at least to a first approximation. Some per-entry work afterward may then polish up the details.

`cmslos=true` This option alters biblatex's standard behavior when processing the shorthand field. Chicago's author-date style only seems to recommend the use of short-hands as abbreviations for long authors' names, particularly institutional names, which means the shorthand will replace only the name part in citations rather than the whole citation (17.47; bsi:abbreviation:15, iso:electrodoc:15). It suggests placing the expansion of the abbreviation into the reference list itself, a procedure that I have implemented in this release using the **customc** entry type, which see. Please note that you can still print a list of shorthands if you wish, and you can also get back something approaching the "standard" behavior of shorthands if you give the `cmslos=false` option to biblatex-chicago in your document preamble. Cf. section 5.2, s.v. "**shorthand**" above, and also cms-dates-sample.pdf.

`nodates=true` This option means that for all entry types except inreference, misc, and reference, biblatex-chicago will automatically provide `\bibstring{nodates}` for any entry that doesn't otherwise provide a date for citations and for the heads of entries in the list of references. If you set `nodates=false` in your preamble, then the package won't perform this substitution in any entry type whatsoever. (The bibstring expands to "`n.d.`" in English.)

`usecompiler=`
`true` This option enables automatic use of the name of the compiler (in the namec field) at the head of an entry, usually in the absence of an author, editor, or translator, in accordance with the specification (*Manual* 17.41). It may also, like useauthor, useeditor, and usetranslator, be disabled on a per-entry basis by setting `usecompiler=false` in the options field. The only, subtle, difference between this switch and those standard biblatex switches is that this one won't remove namec from the sorting list, whereas `useauthor=false` and `useeditor=false` do remove the author and editor. You may, therefore, in corner cases, require a sortkey in the entry.

5.4.3 Style Options – Preamble

These are parts of the specification that not everyone will wish to enable. All except the second can be used even if you load the package in the old way via a call to biblatex, but most users can just place the appropriate string(s) in the options to the `\usepackage{biblatex-chicago}` call in your preamble.

`annotation` At the request of Emil Salim, I have added to this version of biblatex-chicago the ability to produce annotated reference lists. If you turn this option on then the contents of your annotation (or annote) field will be printed after the reference. (You can also use external files to store annotations – please see biblatex.pdf § 3.10.7 for details on how to do this.) This functionality is currently in a beta state, so before you use it please have a look at the documentation for the annotation field, in section 5.2 above.

`footmarkoff` Although the *Manual* (16.25) recommends specific formatting for footnote (and endnote) marks, i.e., superscript in the text and in-line in foot- or endnotes, Charles Schaum has brought it to my attention that not all publishers follow this practice, even when requiring Chicago style. I have retained this formatting as the default setup, but if you include the `footmarkoff` option, biblatex-chicago will not alter LaTeX's (or the endnote package's) defaults in any way, leaving you free to follow the specifications of your publisher. I have placed all of this code in biblatex-chicago.sty, so if you load the package with a call to biblatex instead, then once again footnote marks will revert to the LaTeX default, but of course you also lose a fair amount of other formatting, as well. See section 5.5.1, below.

`headline` Several users have requested an option that turns off the automatic transformations that produce sentence-style capitalization in the title fields of the author-

date style. If you set this option, the word case in your title fields will not be changed in any way, that is, this doesn't automatically transform your titles into headline-style, but rather allows the .bib file to determine capitalization. It works by redefining the command `\MakeSentenceCase`, so in the unlikely event you are using the latter anywhere in your document please be aware that it will also be turned off there.

juniorcomma The *Manual* (6.49) states that "commas are no longer required around *Jr.* and *Sr.*," so by default biblatex-chicago has followed standard biblatex in using a simple space in names like "John Doe Jr." Charles Schaum has pointed out that traditional BibTeX practice was to include the comma, and since the *Manual* has no objections to this, I have provided an option which allows you to turn this behavior back on, either for the whole document or on a per-entry basis. Please note, first, that numerical suffixes (John Doe III) never take the comma. The code tests for this situation, and detects cardinal numbers well, but if you are using ordinals you may need to set this to `false` in the options field of some entries. Second, I have fixed a bug in older releases which always printed the "Jr." part of the name immediately after the surname, even when the surname came before the given names (as in a reference list). The package now correctly puts the "Jr." part at the end, after the given names, and in this position it always takes a comma, the presence of which is unaffected by this option.

natbib This may look like the standard biblatex option, but to keep the coding of biblatex-chicago.sty simpler for the moment I have reimplemented it there, from whence it is merely passed on to biblatex. If you load the Chicago style with `\usepackage{biblatex-chicago}`, then the option should simply read `natbib`, rather than `natbib=true`. The shorter form also works if you use `\usepackage [style=chicago-authordate]{biblatex}`, so I hope this requirement isn't too onerous.

noibid At the request of an early tester, I have included this option to allow you globally to turn off the `ibidem` mechanism that biblatex-chicago-authordate uses by default. This mechanism doesn't actually print "Ibid," but rather includes only the postnote information in a citation, i.e., it will print (224) instead of (Author 2000, 224). Setting this option will mean that none of these shortened citations will appear automatically. For more fine-grained control of individual citations you'll probably want to use the `\citereset` command, allied possibly with the biblatex `citereset` option, on which see biblatex.pdf §3.1.2.1.

shorthandfull Kenneth Pearce has suggested that, in some fields of study, a list of shorthands providing full bibliographical information may replace the list of references itself. This option, which must be used in tandem with `cmslos=false`, prints this full information in the list of shorthands, though of course you should remember that any .bib entry not containing a shorthand field won't appear in such a list. Please see the documentation of the shorthand field in section 5.2 above for information on further options available to you for presenting and formatting the list of shorthands.

strict This still-experimental option attempts to follow the *Manual*'s recommendations (16.57) for formatting footnotes on the page, using no rule between them and the main text unless there is a run-on note, in which case a short rule intervenes to emphasize this continuation. I haven't tested this code very thoroughly, and it's possible that frequent use of floats might interfere with it. Let me know if it causes problems.

5.4.4 Style Options – Entry

These options are settable on a per-entry basis in the options field; both relate to the presentation of dates in citations and the list of references.

cmsdate The *Manual* outlines a series of options for entries with more than one date (17.124–27). All of these possibilities are available in biblatex-chicago using the `cmsdate` entry option. It has 4 possible states relevant to this problem, alongside

a fifth which I discuss below. An example should make this clearer. Let us assume that an entry presents a reprinted edition of a work by Smith, first published in 1926 (the origdate) and reprinted in 1985 (the date):

off: This is the default. The citation will look like (Smith 1985).

on: The citation will look like (Smith 1926).

new: The citation will look like (Smith 1926/1985).

old: The citation will look like (Smith [1926] 1985).

As I explained in detail above in section 5.2, s.v. "**date**," because biblatex's sorting algorithms and automatic creation of the extrayear field refer by default to the date before the origdate when both are present, there may be situations when you need to have the *earlier* year in the date field, and the later one in origdate, e.g., if you have another reprinted work by the same author originally printed in the same year. Biblatex-chicago-authordate will automatically detect this switch, and given the same reprinted work as above, the results will be as follows:

off: This is the default. The citation will look like (Smith 1926a).

on: The citation will look like (Smith 1926a).

new: The citation will look like (Smith 1926a/1985).

old: The citation will look like (Smith [1926a] 1985).

switchdates   If, for any reason, simply switching the date and the origdate isn't possible in a given entry, then you can put `switchdates` in the options field to achieve the same result. Please take a look at the full documentation of the **date** field to which I referred just above, and also at cms-dates-sample.pdf and dates-test.bib for examples of how all this works.

New!   The *Manual* specifies that "a list of works cited need not list newspaper items if these have been documented in the text" (17.191). This will apply mainly to article and review entries with entrysubtype `magazine`, and involves a parenthetical citation giving the journaltitle and then the full date, not just the year, with any other relevant identifying information incorporated into running text. In cmsdate=full   order to facilitate this, I have added a further switch to the `cmsdate` option — **full** — which *only* affects the presentation of citations, and causes the printing of the full date specification there. You can use the standard biblatex `skipbib` option to keep such entries from appearing in the list of references, and you may, if your .bib entry is a complete one, also need `useauthor=false` in order to ensure that the journaltitle appears in the citations rather than the author.

As a final note, I should point out that the code in chicago-authordate.cbx allows `cmsdate` to be used in the document preamble as a general setting. This leads to a world of pain, so I very strongly advise against it, though I'm leaving it in for testing purposes.

5.5   General Usage Hints

5.5.1   Loading the Style

With the addition of the author-date style to the package, I have provided two keys for choosing which style to load, `notes` and `authordate`, one of which you put in the options to the \usepackage command. With early versions of biblatex-chicago, the standard way of loading the package was via a call to biblatex, e.g.:

```
\usepackage[style=chicago-authordate,strict,backend=biber,%
babel=other,bibencoding=inputenc]{biblatex}
```

Now, the default way to load the style, and one that will in the vast majority of standard cases produce the same results as the old invocation, will look like this:

```
\usepackage[authordate,strict,backend=biber,babel=other,%
bibencoding=inputenc]{biblatex-chicago}
```

If you read through biblatex-chicago.sty, you'll see that it sets a number of biblatex options aimed at following the Chicago specification, as well as setting a few formatting variables intended as reasonable defaults (see section 5.4.1, above). Some parts of this specification, however, are plainly more "suggested" than "required," and indeed many publishers, while adopting the main skeleton of the Chicago style in citations, nonetheless maintain their own house styles to which the defaults I have provided do not conform.

If you only need to change one or two parameters, this can easily be done by putting different options in the call to biblatex-chicago or redefining other formatting variables in the preamble, thereby overriding the package defaults. If, however, you wish more substantially to alter the output of the package, perhaps to use it as a base for constructing another style altogether, then you may want to revert to the old style of invocation above. You'll lose all the definitions in biblatex-chicago.sty, including those to which I've already alluded and also the code that sets the note number in-line rather than superscript in endnotes or footnotes. Also in this file is the code that calls cms-american.lbx, which means that you'll lose all the Chicago-specific bibstrings I've defined unless you provide, in your preamble, a \DeclareLanguageMapping command adapted for your setup, on which see section 6 below and also §§ 4.9.1 and 4.11.7 in Lehman's biblatex.pdf.

What you *will not* lose is the ability to call the package options annotation, strict, cmslos=false and noibid (section 5.4.3, above), in case these continue to be useful to you when constructing your own modifications. There's very little code, therefore, actually in biblatex-chicago.sty, but I hope that even this minimal separation will make the package somewhat more adaptable. Any suggestions on this score are, of course, welcome.

5.5.2   Other Hints

Starting with biblatex version 1.5, in order to adhere to the author-date specification you will need to use Biber to process your .bib files, as BIBTEX (and its more recent variants) will no longer provide all the required features. The previous release of Biber (0.9.5), however, contained bugs that made it tricky to use with biblatex-chicago. These bugs have been addressed in 0.9.6, so I recommend you upgrade to it and to the latest biblatex (1.7), which are designed to work together. This document assumes that you are using Biber; if you wish to continue using BIBTEX then you need biblatex version 1.4c and, if you have any problems with the current release, possibly biblatex-chicago 0.9.7a.

If your .bib file contains a large number of entries with more than three authors, then you may run into some limitations of the biblatex-chicago code. The default settings in the package are maxnames=3,minnames=1 in citations and maxbibnames=10,minbibnames=7 in the list of references. In practice, this means that an entry like hlatky:hrt, with 5 authors, will present all of them in the list of references but will truncate to one in citations, like so: (Hlatky et al. 2002). For the vast majority of circumstances, these settings are exactly right for the Chicago author-date specification. However, if "a reference list includes another work *of the same date* that would also be abbreviated as ['Hlatky et al.'] but whose coauthors are different persons or listed in a different order, the text citations must distinguish between them" (16.118). The new (Biber-only) biblatex option uniquelist, set for you in biblatex-chicago.sty, will automatically handle many of these situations for you, but it is as well to understand that it does so by temporarily suspending the limits, listed above, on how many names to print in a citation. Without uniquelist, biblatex would present such a work as, e.g., (Hlatky et al. 2002b), while hlatky:hrt would be (Hlatky et al. 2002a). This does distinguish between them, but inaccurately, as it suggests that the two different author lists are exactly the same. With uniquelist, the two citations

might look like (Hlatky, Boothroyd et al. 2002) and (Hlatky, Smith et al. 2002), which is what the specification requires.

If, however, the distinguishing name occurs further down the author list — in fourth or fifth position in our examples — then the default settings would produce citations with all 4 or 5 names printed, which can become awkwardly long. In such a situation, you can provide shortauthor fields that look like this: {{Hlatky et al., \mkbibquote{Quality of Life,}}} and {{Hlatky et al., \mkbibquote{Depressive Symptoms,}}}, using a shortened title to distinguish the references. This would produce (Hlatky et al., "Quality of Life," 2002) and (Hlatky et al., "Depressive Symptoms," 2002), again as the spec requires. There is, unfortunately, no simpler way that I know of to deal with this situation.

One useful rule, when you are having difficulty creating a .bib entry, is to ask yourself whether all the information you are providing is strictly necessary. The Chicago specification is a very full one, but the *Manual* is actually, in many circumstances, fairly relaxed about how much of the data from a work's title page you need to fit into a reference. Authors of introductions and afterwords, multiple publishers in different countries, the real names of authors more commonly known under pseudonyms, all of these are candidates for exclusion if you aren't making specific reference to them, and if you judge that their inclusion won't be of particular interest to your readers. Of course, any data that may be of such interest, and especially any needed to identify and track down a reference, has to be present, but sometimes it pays to step back and reevaluate how much information you're providing. I've tried to make biblatex-chicago robust enough to handle the most complex, data-rich citations, but there may be instances where you can save yourself some typing by keeping it simple.

Scot Becker has pointed out to me that the inverse problem not only exists but may well become increasingly common, to wit, .bib database entries generated by bibliographic managers which helpfully provide as much information as is available, including fields that users may well wish not to have printed (ISBN, URL, DOI, pagetotal, inter alia). The standard biblatex styles contain a series of options, detailed in biblatex.pdf §3.1.2.2, for controlling the printing of some of these fields, and with this release I have implemented the ones that are relevant to biblatex-chicago, along with a couple that Scot requested and that may be of more general usefulness. There is also a general option to excise with one command all the fields under consideration – please see section 5.4.2 above.

Finally, allow me to reiterate what Philipp Lehman says in biblatex.pdf, to wit, use bibtex8, rather than standard BibTeX, and avoid the cryptic errors that ensue when your .bib file gets to a certain size.

6   Internationalization

Several users have requested that, in line with analogous provisions in other "American" biblatex styles (e.g., biblatex-apa and biblatex-mla), I include facilities for producing a Chicago-like style in other languages. I have supplied three lbx files, cms-german.lbx, its clone cms-ngerman.lbx, and cms-french.lbx, in at least partial fulfillment of this request. For this release, Baldur Kristinsson has very kindly provided cms-icelandic.lbx for speakers of that language, while Håkon Malmedal has equally kindly provided cms-norsk.lbx, cms-norwegian.lbx, and cms-nynorsk.lbx. I have added cms-british.lbx in order to simplify and to improve the package's handling of non-American typographical conventions in English. This means that all — or at least most — of the Chicago-specific bibstrings are now available for documents and reference apparatuses written in these languages, with, as I intend, more languages to follow, limited mainly by my finite time and even-more-finite competence. (If you would like to provide bibstrings for a language in which you want to work, or indeed correct deficiencies in the lbx files contained in the package, please contact me.)

babel   Using these facilities is fairly simple. By default, and this functionality remains the same as it was in the previous release of biblatex-chicago, calls to

`\DeclareLanguageMapping` in biblatex-chicago.sty will automatically load the American strings, and also biblatex's American-style punctuation tracking, when you:

1. Load babel with `american` as the main text language.

2. Load babel with `english` as the main text language.

    or

3. Do not load babel at all.

(This last is a change from the biblatex defaults — cp. § 3.9.1 in biblatex.pdf — but it seems to me reasonable, in an American citation style, to expect this arrangement to work well for the majority of users.)

New! If, for whatever reason, you wanted to use biblatex-chicago but retain British typographical conventions — punctuation outside of quotation marks, outer quotes single rather than double, etc. — then you no longer need to follow the complicated rules outlined in previous releases of biblatex-chicago. Instead, simply load babel with the `british` option.

If you want to use French, German, Icelandic, or Norwegian strings in the reference apparatus, then you can load babel with `french`, `german`, `icelandic`, `ngerman`, `norsk`, or `nynorsk` as the main document language. You no longer need any calls to `\DeclareLanguageMapping` in your document preamble, since biblatex-chicago.sty now automatically provides these if you load the package in the standard way.

You can also define which bibstrings to use on an entry-by-entry basis by using the hyphenation field in your bib file, but you will have to make sure that the Chicago-specific strings for the given language are loaded using a `\DeclareLanguageMapping` call in the preamble. Indeed, if `american` isn't the main text language when loading babel, then in order to have access to those strings you'll need `\DeclareLanguageMapping{american}{cms-american}` in your preamble, as biblatex-chicago.sty won't load it for you.

Three other hints may be in order here. Please note, first, that I haven't altered the standard punctuation procedures used in any of the other available languages, so commas and full stops will appear outside of quotation marks, and those quotation marks themselves will be language-specific. If, for whatever reason, you wish to follow the Chicago specification and move punctuation inside quotation marks, then you'll need a declaration of this sort in your preamble:

```
\DefineBibliographyExtras{german}{%
    \DeclareQuotePunctuation{.,}}
```

Second, depending on the nature of your bibliography database, it will only rarely be possible to process the same bib file in different languages and obtain completely satisfactory results. Fields like note and addendum will often contain language-specific information that won't be translated when you switch languages, so manual intervention will be necessary. If you suspect you may have a need to use the same bib file in different languages, you can minimize the amount of manual intervention required by using the bibstrings defined either by biblatex or by biblatex-chicago. Here, a quick read through notes-test.bib and/or dates-test.bib should give you an idea of what is available for this purpose — see esp. the strings `by`, `nodate`, `newseries`, `number`, `numbers`, `oldseries`, `pseudonym`, `reviewof`, `revisededition`, and `volume`, and also section 4.3.1 above, esp. s.v. "`\partedit`."

Finally, the French and German bibstrings I have provided may well break with established bibliographical traditions in those languages, but my main concern when choosing them was to remain as close as possible to the quirks of the

Chicago specification. I have entirely relied on the judgment of the creators of the Icelandic and Norwegian localizations in those instances. If you have strong objections to any of the strings, or indeed to any of my formatting decisions, please let me know.

7 One .bib Database, Two Chicago Styles

I have, when designing this package, attempted to keep at least half an eye on the possibility that users might want to re-use a .bib database in documents using the two different Chicago styles. I have no idea whether this will even be a common concern, but I thought I might gather in this section the issues that a hypothetical user might face. The two possible conversion vectors are by no means symmetrical, so I provide two lists, items within the lists appearing in no particular order. These may well be incomplete, so any additions are welcome.

7.1 Notes -> Author-Date

This is, I believe, the simpler conversion, as most well-constructed .bib entries for the notes & bibliography style will nearly "just work" in author-date, but here are a few caveats nonetheless:

1. You'll need curly brackets in titles, subtitles, etc., to protect capitalization in the sentence-style defaults of author-date.

2. You may need to reevaluate your use of shorthands, given that by default the author-date style uses them in place of authors rather than in place of the whole citation. The preamble option cmslos=false may help, but this may leave your document out-of-spec.

3. The potential problem with multiple author lists containing more than three names doesn't arise in the notes & bibliography style, so the shortauthor fields in such entries may need alteration according to the instructions in section 5.5.2 above.

4. Date presentation is relatively simple in notes & bibliography, but you'll need to contemplate the cmsdate options from section 5.4.4 when doing the conversion to author-date.

7.2 Author-date -> Notes

It is my impression that an author-date .bib database is somewhat easier to construct in the first instance, but subsequently converting it to notes & bibliography is a little more onerous. Here are some of the things you may need to address:

1. If you've decided against using the \partedit macro and friends from section 5.3.1 above, commands not strictly necessary for author-date, you'll need to insert them now.

2. In general, you need to be more careful in notes & bibliography about capitalization issues. Fields which only appear once in author-date — in the list of references — may appear in both long notes and in the bibliography, in different syntactic contexts, so a quick perusal of the documentation of the \autocap macro in section 5.3.1 above may help.

3. You also need to be more careful about the use of abbreviations, e.g., in journal names, where the author-date style is more liberal in their use than the notes & bibliography style. (Cf. 17.159.) The bibstrings mechanism and package options sort much of this out automatically, but not all.

4. Although you can get away with the article type for all sorts of periodical entries in author-date, you'll need the review type for notes & bibliography. Any well-constructed review entry should work just fine in author-date, so

this is a one-time conversion. Please see the documentation in section 4.1, s.vv. "article" and "review," above.

5. The shorttitle field is used extensively in notes & bibliography to keep short notes short, so you may find that you need to add a fair number of these to an author-date database. In general this field is ignored by the latter style, so this, too, will be a one-time conversion.

6. You may need to add letter entries if you are citing just one letter from a published collection. See section 4.1, s.v. "letter," above.

7. The default shorthand presentation differs from one style to the other. You may need to reconsider how you use this field when making the conversion.

8. As I explained above in section 4.2, s.v. "date," I have included compatibility code in biblatex-chicago-notes for the cmsdate (silently ignored) and switchdates options, along with the automatic mechanism for reversing date and origdate. This means that you can, in theory, leave all of this alone in your .bib file when making the conversion, though I'm retaining the right to revise this if the code in question demonstrably interferes with the functioning of the notes & bibliography style.

8   Interaction with Other Packages

endnotes For users of the endnotes package — or of pagenote — biblatex 0.9 offers considerably enhanced functionality. Please read Lehman's RELEASE file and the documentation of the notetype option in biblatex.pdf § 3.1.2.1.

memoir Another problem I have found occurs because the memoir class provides its own commands for the formatting of foot- and end-note marks. By default, biblatex-chicago uses superscript numbers in the text, and in-line numbers in foot- or end-notes, but I have turned this off when the memoir class is loaded, reasoning that users of that package may well have their own ideas about such formatting.

ragged2e The footnote mark code I've just mentioned also causes problems for the ragged2e package, but in this case a simple workaround is to load biblatex *after* you've loaded ragged2e in your document preamble.

XeLATEX Nick Andrewes alerted me to problems that appeared when he used the XeLATEX engine to process his files. These included spurious punctuation after quotation marks in some situations, and also failures in the automatic capitalization routines. Some of these problems disappeared when I switched to using Lehman's punctuation-tracking code for "American" styles, but some remained. A bug report from J. P. E. Harper-Scott suggested a new way of addressing the issue, and the newest version of Lehman's csquotes package (4.4) incorporates a full fix. This, thankfully, doesn't require turning off any of XeLATEX's features, and indeed merely involves upgrading to the latest version of csquotes, which I recommend doing in any case. Compatibility with the EU1 encoding is now standard in that package.

9   TODO & Known Bugs

This release, belatedly, implements the specifications of the 16th edition of the *Chicago Manual of Style*. I am maintaining the 15th-edition styles for those who may need them, but the majority of my time will now be devoted to improving, and extending the scope of, the styles devoted to the most recent edition. I encourage all users of the notes & bibliography style to upgrade as soon as possible, and any users of the author-date style who don't require the (until now) traditional title formatting should do the same. The next release will contain an author-date style that allows you to maintain that title formatting

while switching in all other respects to the latest specification. If you still have feature requests for the older specification, I'll do what I can to include them.

Regardless of which edition you are considering, there are a number of things I haven't implemented. The solution in brown:bremer to multi-part journal articles obviously isn't optimal, and I should investigate a way of making it simpler. If the kludge presented there doesn't appeal, you can always, for the time being, refer separately to the various parts. Legal citations are another thorny issue, and implementing them would involve choosing a particular documentation scheme (for which there exist at least three widely-used standards in the US), then providing what would be, it has seemed to me, an entirely separate biblatex style, bearing little or no relation to the usual look of Chicago citations. Indeed, the *Manual* (17.275) even makes it clear that you should be using a different reference book if you are presenting work in the field, so I've thought it prudent to stay clear of those waters so far. I have received a request for this feature, however, so when I have finished the updates for the 16th edition I shall look at it more closely. If you have other issues with particular sorts of citation, I'm of course happy to take them on board. The *Manual* covers an enormous range of materials, but if we exclude the legal citations it seems to me that the available entry types could be pressed into service to address the vast majority of them. If this optimism proves misguided, please let me know.

Kenneth L. Pearce has reported a bug that appears when using multiple citation commands inside the annotation field of annotated bibliographies. As late as I am with the update to the 16th edition of the *Manual*, I shall attempt to address this in a future release. If you run into this problem, he suggests placing all the citations together in parentheses at the end of the annotation, though on my machine this doesn't always work too well, either.

Version 1.5 of biblatex revised the way the package deals with breaking long URLs and DOIs across lines. The new code is designed to deal as elegantly as possible with as wide a variety of cases as possible, but in a few of my test entries it has caused some line-breaking issues of its own. Depending on the nature of your cited sources, it may be useful for you to revert to the older, pre-1.5 biblatex behavior, something which is easily done by copying and pasting the old definition of the \biburlsetup command into your document preamble. If you look in the preambles of cms-notes-sample.tex or cms-dates-sample.tex, you can see the redefinition and copy it from there, just to see whether it helps your situation. Biblatex 1.7 also now provides several new counters for tuning the formatting of URLs, and these may serve you better than the old code. I have tested them in cms-dates-sample.tex and they work well. Cf. biblatex.pdf, § 4.10.3.

The switch to Biber for the author-date specification means that biblatex now provides considerably enhanced handling of the various date fields. I have attempted to document the relevant changes in cms-dates-sample.pdf and in the **date** discussion in section 5.2, above, but it's possible the package may need some changes to cope with all the permutations. Please let me know if you find something that looks like a bug.

Recent versions of biblatex have introduced some new entry types for citing multi-volume works. These are largely aimed at those already using Biber, which provides much-improved functionality for the crossref field compared to standard BibTEX or bibtex8. Depending upon the time required to implement the changes for the 16th edition, these types may make it into the package for the next major release, or they may have to wait until the one after.

Roger Hart, Pierric Sans, and a number of other users have reported a bug in the formatting of title fields. This, as far as I can tell, has to do with the interaction between \MakeSentenceCase and certain characters at the start of the title, particularly Unicode ones. It may help for the moment to put an empty set of curly braces {} at the start of the field, but I shall look into this further.

This release fixes the other formatting errors of which I am aware, though users writing in French should be aware of problems with the \partedit command in section 4.3.1 above. There also remain the larger issues I've discussed throughout this documentation, which mainly represent my inability to make all of biblatex-chicago's formatting functions transparent for the user, but thankfully Lehman's superb punctuation-tracking code has preemptively fixed a great many small errors, some of which I hadn't even noticed before I began testing that functionality. That there are other micro-bugs seems certain — if you report them I'll do my best to fix them.

I haven't looked closely at the standard BibTeX style by Glenn Paulley, contained in the chicago package on CTAN, which implements the author-date specification from the 13th edition of the *Manual*. If anyone is still using the style, and requires some compatibility code for it, let me know, and I'll look into it.

10 Revision History

0.9.9g: Released August 21, 2014

- No changes to the 15th-edition styles.

0.9.9f: Released August 15. 2014

- Small changes to both styles so that they compile with the latest biblatex (2.9a). No other fixes.

0.9.9e: Released January 29, 2014

- No changes to the 15th-edition styles.

0.9.9d: Released October 30, 2013

- I have made just enough changes to the styles to ensure they compile the test files correctly, but I am marking them as "strongly deprecated," and encourage all users to upgrade as soon as is practicable to the 16th-edition styles. In the next release, I shall mark them as "obsolete," and they will receive no further updates.

0.9.9c: Released March 15, 2013

- No changes to either style, but I am marking them as "deprecated," and encourage all users to upgrade as soon as is practicable to the 16th-edition styles.

0.9.9b: Released December 6, 2012

- I have updated calls to \DeclareLabelname and \DeclareLabelyear in .cbx files so that the package works correctly with the most recent version (2.4) of biblatex.

- I am grateful to Baldur Kristinsson for providing an Icelandic localization file for biblatex-chicago, called cms-icelandic.lbx. You'll see if you look through it that it is still something of a work in progress, but it should cover most needs in that language very well. If you would like to fill in some of the gaps please let me know.

- I am also grateful to Håkon Malmedal for providing Norwegian localizations for biblatex-chicago, contained in the files cms-norsk.lbx, cms-norwegian.lbx, and cms-nynorsk.lbx.

- I have added a new British localization (cms-british.lbx) that should make it much simpler for users to produce documents adhering to that tradition. For further details on the usage of all these localizations please see section 6, above.

0.9.9a: Released July 30, 2012

- I have made a few changes to biblatex-chicago.sty to allow the package to work with the latest version (2.0) of biblatex. In all other respects this release is identical to 0.9.9. If you do use the package with biblatex 2.0, please let me know if there are issues I need to address. Thanks to Charles Schaum for alerting me to some of them.

0.9.9: Released July 5, 2012

This release, for the first time, provides style files implementing the specifications of the 16th edition of *The Chicago Manual of Style*. As I am continuing to maintain the older files, here follows a list of changes to the 15th-edition styles since the last release:

- To continue using the 15th-edition styles, for whatever reason, please remember to specify either `notes15` or `authordate15` when loading biblatex-chicago in your preamble.

- For reprinted books, you can now present more detailed information about the original edition using the new **origlocation** and **origpublisher** fields. You can also use this field in letter or misc (with entrysubtype) entries to give the place where a published or unpublished letter was written. These uses apply to both styles.

- Thanks to a patch sent by Kazuo Teramoto, you can now take advantage of biblatex's facilities for citing **eprint** resources. There is also a new `eprint` option, set to `true` by default, which controls the printing of this field in the author-date style. You can set the option both in the preamble and in the options field of individual entries. The field will always print in **online** entries.

- I have added a new citation command, `\citejournal`, to the notes & bibliography style to allow you to present journal articles using an alternative short note form, which may be a clearer form of reference in certain circumstances. Such short notes will present the name of the author, the journaltitle, and the volume number.

- I have included a very slightly modified version of the standard biblatex `\citeauthor` command, which may be useful for references to works from classical antiquity.

- I have added a new `cmsdate=full` switch to the author-date style, which only affects citations in the text, and means that a full date specification will appear there, rather than just the year. If you follow the *Manual's* recommendations concerning newspaper and magazine articles only appearing in running text and not in the reference list, this option will help.

- I have provided a new option, `headline`, which turns off the automatic transformations that produce sentence-style capitalization in the title fields of the author-date style. If you set this option, the word case in your title fields will not be changed in any way, that is, this doesn't automatically transform your titles into headline-style, but rather allows the .bib file to determine capitalization.

- Following a request by Kenneth Pearce, I have added new facilities for presenting **shorthands** in the author-date style. There are two new `bibenvironments` which you can set using the `env` option to the `\printshorthands` command: `losnotes` formats the list of shorthands so that it can be presented in a footnote, while `losendnotes` does the same for endnotes. There is also a new preamble option, `shorthandfull`, which prints the full bibliographical information of each entry inside the list of shorthands, allowing such a list effectively to replace a list of references. You need to set the `cmslos=false` option as well in order for this to work.

- Thanks to a coding suggestion from Gildas Hamel, I have redefined the \bibnamedash in biblatex-chicago.sty, which should now by default look a little better in a wider variety of fonts.

- At the request of Baldur Kristinsson, I have added \DeclareLanguageMapping commands to biblatex-chicago.sty for all the languages biblatex-chicago currently provides. If you load the style in the standard way, you no longer need to provide these mappings manually yourself.

- I have improved the date handling in both styles, particularly with regard to date ranges.

0.9.8d: Released November 15, 2011

- Some minor fixes to both styles for compatibility with biblatex 1.7.

- Kenneth Pearce found an error in the formatting of bookinbook titles in the author-date style's list of shorthands. This should work properly now.

- Jonathan Robinson spotted some inconsistencies in the way the notes & bibliography style interacts with the hyperref package. Following his suggestion, short notes now point to long notes when the latter are available, but to bibliography entries instead when you have set the short option.

0.9.8c: Released October 12, 2011

- Emil Salim pointed out some rather basic errors in the presentation of inproceedings and proceedings entries, errors that have been present from the first release of the style(s). These should now, belatedly, have been put right.

- Minor improvements to coding and documentation.

0.9.8b: Released September 29, 2011

- Bad Dates: Christian Boesch alerted me to some date-formatting errors produced when using the styles with the german option to babel. A little further investigation revealed similar problems with french, and before long it became clear that date handling in biblatex-chicago was generally, and significantly, sub-optimal. The whole system should now be more robust and more accurate.

- The new date-handling code shouldn't require any changes to your .bib files, but users of the author-date style may want to have a look at the documentation of the letter and misc entry types, and of the four date fields, for some information about how the changes could simplify the creation of their databases.

- Various other minor improvements.

0.9.8a: Released September 21, 2011

- Fixed a series of unsightly errors in the author-date style, discovered while working on the pending update to the 16th edition.

- Fixed bugs uncovered in both the author-date and the notes & bibliography styles thanks to Charles Schaum's adventurous use of the origyear field.

- Added two new bibstrings to the cms-*.lbx files to fix potential bugs in some of the audiovisual entry types.

0.9.8: Released August 31, 2011

Obsolete and Deprecated Features:

- Starting with biblatex version 1.5, in order to adhere to the author-date specification you will need to use Biber to process your .bib files, as BibTeX (and its more recent variants) will no longer provide all the required features. Unfortunately, however, the current release of Biber (0.9.5) contains bugs that make it tricky to use with biblatex-chicago. These bugs have been addressed in 0.9.6 beta, which is available for various operating systems in the `development` subdirectory of your SourceForge mirror, e.g., UK mirror. (If, by the time you read this, Biber 0.9.6 has already been released, then so much the better.) Please see the start of cms-dates-sample.pdf for more details.

- The switch to Biber for the author-date specification means that biblatex now provides considerably enhanced handling of the various date fields. I have attempted to document the relevant changes in cms-dates-sample.pdf and in the **date** discussion in section 5.2, above, but in my testing the only alterations I've so far had to make to my .bib files involve adhering more closely to the instructions for specifying date ranges. Biber doesn't like {1968/75}, and will ignore it. Either use {1968/1975} or use {1968--75} in the year field.

- In the notes & bibliography style, and mainly in article, letter, misc, and review entries, previous releases of biblatex-chicago recommended using the `\isdot` macro when you needed both to define a field and not have it appear in the printed output. This mechanism no longer works in biblatex 1.6, and while addressing the problem I realized that relying on it covered over some inconsistencies and bugs in my code, so from this release forward you will need to modify your .bib and .tex files to use other, more standard mechanisms to achieve the same ends, in particular the `\headlesscite` commands and declaring `useauthor=false` in the options field. Please consult the documentation in section 4.3.1, s.v. "`\isdot`," for a list of example entries where you can see these changes at work.

Other New Features:

- Fixed the `\smartcite` citation command in, and added a `\smartcites` command to, chicago-notes.cbx, so that the notes & bibliography style no longer prints parentheses around citations produced using `\autocite(s)` commands inside `\footnote` commands. Many thanks to Louis-Dominique Dubeau for pointing out this error.

- Rembrandt Wolpert and Aaron Lambert pointed out an issue with a command (`\lbx@fromlang`) that biblatex no longer defines, and Charles Schaum very kindly suggested a temporary workaround in a newsgroup post, a workaround that should no longer be necessary.

- Version 1.6 of biblatex no longer allows you to redefine the `minnames` and `maxnames` options in the `\printbibliography` command, so I've defined `minbibnames` and `maxbibnames` in biblatex-chicago.sty, instead. These parameters have been available since version 1.1, so this is now the earliest version of biblatex that will work with the Chicago styles. Of course, if the (Chicago-recommended) values of these options don't suit your needs, you can redefine them in your document preamble.

0.9.7a: Released March 17, 2011

- Added `\smartcite` command to chicago-notes.cbx so that the notes & bibliography style will work with biblatex 1.3.

- Added bibstrings `byconductor` and `cbyconductor` to the .lbx files, mistakenly omitted in version 0.9.7.

- Minor fixes to the docs.

0.9.7: Released February 15, 2011

Obsolete and Deprecated Features:

- The **customa** and **customb** entry types are now obsolete. Any such entries will be ignored. Please change any that remain to **letter** and **bookinbook**, respectively.

- If you still have any **customc** entries containing introductions, prefaces, or the like, please change them to **suppbook**. I have recycled customc for another purpose, on which see below.

Other New Features:

- At the request of Johan Nordstrom, I have added three new audiovisual entry types to both styles, **audio**, **music**, and **video**. The documentation of audio in sections 4.1 and 5.1 above contains an overview of the three, and the details for each type are to be found under their individual headings.

- I have transformed the **customc** entry type to enable alphabetized cross-references — the "c" is meant to be mnemonic — to other, separate entries in a reference list or bibliography. In particular, this facilitates cross-references to other names in a list, rather than to other works. In author-date, in a procedure recommended by the *Manual*, this now allows you to expand shorthands inside the reference list rather than in a list of shorthands. In both styles, you can now provide a pointer to the main entry if a reader is looking an author up under, e.g., a pseudonym or other alternative name.

- I have introduced the **userc** field, intended to simplify the printing of the cross-references provided by customc entries. The standard `\nocite` command works as well, but the additional mechanism may be more convenient in some circumstances.

- You can now provide an **eventdate** in music entries to identify, e.g., a particular recording session. It will be printed just after the title.

- In the notes & bibliography style, I have now implemented the **shorthand-intro** field, which allows you to change the string introducing a shorthand in the first, long note. It works just as it does in the standard biblatex styles.

- At the request of Scot Becker, I have added six new field-exclusion options to both styles, all of which can be set both in the document preamble and/or in the options field of individual .bib entries. Three of these — `doi`, `isbn`, and `url` — are standard biblatex options, the others — `bookpages`, `includeall`, and `numbermonth` — are chicago-specific. See the docs in sections 4.4.2 and 5.4.2, above.

- At the request of Charles Schaum, I've added the `juniorcomma` option to both styles, which can be set in the document preamble and/or in the options field of individual entries. It allows you to get the traditional comma between a surname and "Jr." or "Sr."

- Fixed an old inaccuracy in the presentation of "Jr." and "Sr.," so that they now appear at the end of names printed surname first in bibliographies and reference lists.

- Thanks to Andrew Goldstone, I fixed some old inaccuracies in the syntax of shortened notes and bibliography entries presenting multiple contributions to one multi-author (or single-author) volume.

- I've altered the directory structure of the archive containing this release. Files were multiplying, and look set to multiply still further, so I've copied the structure used by Lehman for biblatex itself.

- Fixed an old bug, which I'd guess was triggered quite rarely, in the formatting of publication information in long notes.

- Fixed another bug in author-date where the colon separating titles and subtitles was in the wrong font. The biblatex `punctfont` option solved this.

- Fixed a punctuation bug in InReference entries in the notes & bibliography style. Also fixed title presentation in Reference entries in author-date.

- Fixed some inaccuracies in the tests establishing priority between date and origdate fields. These arose when date ranges were involved, and it's possible I haven't yet addressed all possible permutations of the problem.

- Added several new bibstrings to the cms-*.lbx files for the new audiovisual entry types. This means that the editortype fields can now be set to `director`, `producer`, or `conductor`, depending on your needs. You can also set the fields to `none`, which eliminates all identifying strings, and which is useful for identifying performers of various sorts.

- Minor improvements to documentation.

0.9.5a: Released September 7, 2010

- Quick fix for an elementary and show-stopping mistake in biblatex-chicago.sty, a mistake disguised if you load csquotes, which I do in all my test files. Mea culpa. Many thanks indeed to Israel Jacques and Emil Salim for pointing this out to me.

0.9.5: Released September 3, 2010

Obsolete and Deprecated Features:

- All the custom entry types — **customa**, **customb**, and **customc** — are now deprecated. They will still work for the time being, but please be aware that in the next major release they will no longer function, at least not as you might be expecting. Please change your .bib files to use **letter** (=**customa**), **bookinbook** (=**customb**), and **suppbook** (=**customc**) instead.

- If by some chance anyone is still using the old `\custpunctc` macro, it is now obsolete. It really shouldn't be needed, but let me know if I'm wrong.

Other New Features:

- The Chicago author-date style is now implemented in the package, and is fully documented in section 5, above.

- The default way of loading the style(s) has slightly changed. You should put either `notes` or `authordate` in the options to biblatex-chicago, e.g.:

      \usepackage[authordate,more options ...]{biblatex-chicago}

- With the addition of the second Chicago style, I have thought it appropriate to alter both the name of the package and the names of the files it contains. The package is now biblatex-chicago instead of biblatex-chicago-notes-df, and the following files have been renamed:

    - chicago-notes-df.cbx is now chicago-notes.cbx
    - chicago-notes-df.bbx is now chicago-notes.bbx
    - sample.tex is now cms-notes-sample.tex
    - sample.pdf is now cms-notes-sample.pdf
    - chicago-test.bib is now notes-test.bib
    - biblatex-chicago-notes-df.pdf (this file) is now biblatex-chicago.pdf

The following files have been added:

- – chicago-authordate.cbx
- – chicago-authordate.bbx
- – cms-dates-sample.tex
- – cms-dates-sample.pdf
- – dates-test.bib

The following files have retained their old names:

- – cms-american.lbx
- – cms-french.lbx
- – cms-german.lbx
- – cms-ngerman.lbx
- – biblatex-chicago.sty

- I have implemented the pubstate field, slightly differently yet compatibly in the two styles, to provide a simpler mechanism for identifying a reprinted book. In the author-date style, it is highly recommended you use it, as it sorts out some complicated formatting questions automatically. In the notes & bibliography style it isn't strictly necessary, but may be useful anyway and easier to remember than the old system. See the documentation under pubstate in sections 4.2 and 5.2, above.

- Users of biblatex-chicago-notes no longer need a shortauthor field in author-less manual entries, or in author-less article or review entries with a magazine entrysubtype. The package will now automatically take an author for short notes from the organization field for manual entries and from the journaltitle field for the others. You can still use a shortauthor field if you want, but it's no longer necessary. (This also holds for chicago-authordate.)

- Date presentation in the misc entry type (with entrysubtype) has changed to fix an inaccuracy. You can now use the date and origdate fields to distinguish between two sorts of archival source: letters and "letter-like" sources use origdate, interviews and other non-letters use date. The only difference is in how the date is printed, so current .bib entries will continue to work fine, albeit with minor inaccuracies in the case of non-letter-like sources. See the docs on **misc** in sections 4.1 and 5.1, above.

- When only one date is presented in a patent entry — either in the date or origdate field — this will now always be used as the filing date. In biblatex-chicago-notes, this makes a change from the previous (incorrect) behavior.

- I have included the option dateabbrev=false in the default settings for biblatex-chicago-notes. This ensures that the long month names are printed, as otherwise recent releases of biblatex print the abbreviated ones by default.

- The provision of punctuation in entrysubtype classical entries has been improved, allowing the comma to appear before certain kinds of location specifiers even when citing works by their traditional divisions. See *Manual* 17.253. (This applies to both Chicago styles.)

- The number field in article, periodical, and review entries now allows you to include a series or range of numbers in the field, with the style automatically providing the correct bibstring (singular or plural).

- I have removed and altered bibstrings in the .lbx files to take advantage of the new \bibsstring and \biblstring commands in biblatex, and added one new string (origpubyear) needed by biblatex-chicago-authordate.

0.9a: Released March 20, 2010

- Quick fixes for compatibility with biblatex 0.9a.

0.9: Released March 18, 2010

Obsolete and Deprecated Features:

- The **userd** field is now obsolete. All information it used to hold should be placed in the edition field.

- The **origyear** field is now obsolete in biblatex. It has been replaced by **origdate**, and because the latter allows a full date specification, I have been able to make the operation of customa (= letter), misc (with an entry-subtype), and patent entries more intuitive. The RELEASE file contained in this package gives the short instructions on how to update your .bib files, and you can also consult the documentation of those entry types above.

- The modified csquotes.cfg file I provided in earlier releases is now obsolete, and has been removed from the package. Please upgrade to the latest version of csquotes and, if you are still using my modified .cfg file, remove it from your TeX search path, or at the very least excise the code I provided.

Other New Features:

- Added the files cms-german.lbx (with its clone cms-ngerman.lbx) and cms-french.lbx, which allow the creation of Chicago-like references in those languages. See section 6 above for details on usage.

- Added the annotation package option to allow the creation of annotated bibliographies. This code is still not entirely polished yet, but it is usable. Please see page 20 above for instructions and hints.

- Added biblatex's new **bookinbook** entry type, which currently functions as an alias of the customb type. As biblatex now provides standard equivalents for all of the custom types I initially found it necessary to provide — letter = customa, bookinbook = customb, and suppbook & suppcollection = customc — it may soon be time to prune out the custom types to enhance compatibility with other biblatex styles. I shall give plenty of warning before I do so.

- In line with the new system adopted in biblatex 0.9, using the editortype field turns off the usual string concatenation mechanisms of the Chicago style. See Lehman's RELEASE file for a discussion of this.

- I have added support for the new editor[a–c] and editor[a–c]type fields, and they work just as in standard biblatex, though I'm uncertain how much use they'll get from users of the Chicago style.

- I have added many bibstrings to the .lbx files to help with internationalization. The new ones that you might want to use in your .bib files include: `pseudonym`, `nodate`, `revisededition`, `numbers`, and `reviewof`. Please see section 6 for a fuller list.

0.8.9d: Released February 17, 2010

- Chris Sparks and Aaron Lambert both found formatting bugs in the 0.8.9c code. I've fixed these bugs, and am releasing this version now, the last in the 0.8.9 series. The next release of biblatex-chicago-notes-df, due as soon as possible, will contain many more significant changes, including those necessary for it to function properly with the recently-released biblatex version 0.9. In the meantime, at least version 0.8.9d should produce more accurate output.

0.8.9c: Released November 4, 2009

- Emil Salim noticed that the *ibidem* mechanism wasn't working properly, printing the page number after "Ibid" even when the page reference of the preceding citation was identical. The fix for this involved setting `loccittracker=constrict` in biblatex-chicago.sty, something you'll have to do manually yourself if you're loading the package via a call to biblatex rather than to biblatex-chicago.

- Several users have reported unwanted behavior when repeated names in bibliographies are replaced with the `bibnamedash`. This release should fix both when the `bibnamedash` appears and what punctuation follows it.

0.8.9b: Released September 9, 2009

- Fixed a long-standing bug in formatting names in the bibliography. The package now correctly places a comma after the reversed name that begins the entry, using biblatex's `\revsdnamedelim` command. Many thanks to Johanna Pink for catching my rather egregious error.

- While fixing some formatting errors that cropped up when using the newest version of biblatex (0.8h at time of writing), I also spotted some more venerable bugs in the code for using shortened cross-references for citing multiple entries in a collection of essays or letters. I believe this now works correctly, but please let me know if you discover differently.

- Joseph Reagle noticed that endnote marks (produced using the endnotes package) did not receive the same treatment as footnote marks. I have rectified this, placing the code in biblatex-chicago.sty so that you can turn it off either by using the old package-loading system or by setting the `footmarkoff` package option when loading biblatex-chicago.

- Updates to Lehman's csquotes package have rendered my modifications in csquotes.cfg obsolete. Please use the latest version of csquotes (4.4a at time of writing) and ignore my file, which will disappear in a later release.

- At the request of Will Small, I have included some code, still in an alpha state, to allow you to specify, in the bibliography, the original publication details of essays which you are citing from later reprints (a *Collected Essays* volume, for example). See the documentation above under the reprinttitle field if you would like to test this functionality.

0.8.9a: Released July 5, 2009

- Slight changes for compatibility with biblatex 0.8e. The package still works with 0.8c and 0.8d, as well.

0.8.9: Released July 2, 2009

Obsolete and Deprecated Features:

- The **single-letter bibstrings** (`\bibstring{a}`, `\bibstring{b}`, etc.) are now obsolete. You should replace any still present in your .bib file with `\autocap` commands — see § 3.8.4 of biblatex.pdf.

Other New Features:

- The default way of loading the package is now with

  `\usepackage[further-options]{biblatex-chicago}`

  rather than

  `\usepackage[style=chicago-notes-df,further-options]{biblatex}`.

  Please see section 4.5.1 above for details and hints.

- Package-specific bibstrings have been removed from the .cbx and .bbx files and are now gathered in a new file, **cms-american.lbx**, which changes the way the package interacts with **babel**. It is now somewhat simpler if you want the defaults, but somewhat more complex if you require non-standard features. Please see section 8 above for more details.

- Two new entry types have been added: **artwork** for works of visual art excluding photographs, and **image** for photographs. See the documentation of artwork for how to create .bib entries for both types.

- Added the new bibliography and entry option **usecompiler**, set to true by default. This streamlines the code that finds a name to head an entry (**author -> editor [or namea] -> translator [or nameb] -> compiler [namec] -> title**). The whole system should work more consistently now, but do see the author and namec documentation for improved notes on how to use it.

- Added the new bibliography option **footmarkoff**, to turn off the optional in-line (as opposed to superscript) formatting of the marks in foot- or endnotes. You only need this if you load the package with the new default \usepackage{biblatex-chicago}; users loading it the old way get default LATEX formatting.

- At Matthew Lundin's request, I have added the citation command **\headlesscite**, which works like \headlessfullcite but allows biblatex to decide whether to print the full or the short note.

- Fully adopted biblatex's system for providing end-of-entry punctuation, which should solve some of the bugs users have been finding. See section 4.5.2, above, and do please let me know if inconsistencies remain.

- Added a modified **csquotes.cfg** file to address issues users were having when using the **XeLATEX** engine in combination with biblatex-chicago. See section 8, above.

- Added natbib option to allow users of the default setup to continue to benefit from biblatex's natbib compatibility code. Thanks to Bennett Helm for pointing out this issue.

- Added a **shorthandibid** option to allow the printing of *ibid.* in consecutive references to an entry that contains a shorthand field. Thanks to Chris Sparks for calling my attention to this problem.

- While investigating the preceding, I noticed failures when combining the short option with a shorthand field. The package now actually does what it has always claimed to do under **shorthand**.

- Many small bug fixes and improvements to the documentation.

To Do:

- The shorthand vs *ibid.* question may need more careful addressing in some cross references, and also in relation to the noibid package option.

- Charles Schaum has quite rightly pointed out the inconsistency in my naming conventions — biblatex-chicago.sty as opposed to chicago-notes-df.cbx, for example. I'm going to delay a decision on which way to go with this until a later release.

0.8.5a: Released June 14, 2009

- Quick and dirty fixes to bibliography strings to allow compatibility with biblatex version 0.8d. If you are still using 0.8c, then I would wait for the next version of biblatex-chicago-notes-df, which is due soon. See README.

0.8.5: Released January 10, 2009

Obsolete and Deprecated Features:

- The **\custpunct** commands are now deprecated — Lehman's "American" punctuation tracking facilities should handle quoted text automatically, assuming you remember always to use **\mkbibquote** in your database. If you still need \custpunct, please let me know, as it may be an error in the style.

- With \custpunct no longer needed, the toggles activated by placing "`plain`" in the **type** or **userb** fields are also deprecated.

Other New Features:

- At least **biblatex 0.8b** is now required — 0.8c works fine, as well.

- I now *strongly recommend* that you use **babel** with "`american`" as the main text language. See section 8 above for further details.

- The **customc** entry type has been revised, allowing you to cite any sort of supplementary material using the **type** field instead of relying on toggles in the introduction, afterword, and foreword fields, though these latter still work. The two new entry types **suppbook** and **suppcollection** are both aliased to customc, and therefore work in exactly the same way.

- The new entry type **suppperiodical** is aliased to **review**.

- The new entry type **letter** is aliased to **customa**.

- In **inreference** entries the postnote field of all \cite commands is now treated like data in lista, that is, it will be placed within quotation marks and prefaced with the appropriate string. The only difference is that you can only put one such article name in postnote, as it isn't a list field.

- I've set the new biblatex option usetranslator to true by default, which means entries will automatically be alphabetized by their translator in the absence of an author or an editor.

- A host of small formatting errors were eliminated, nearly all of them through adopting Lehman's punctuation tracker.

- In the main body of this documentation, I've added some **color coding** to help you more quickly to identify entry types and fields that are either new or that have undergone significant revision.

To Do:

- Separate out "options" from the basic citation "style," using a LaTeX style file. This is an architectural change recommended by Lehman.

0.8.2.2: Released November 24, 2008

- Fixed spurious commas appearing in some bibliography entries, spotted by Nick Andrewes. While investigating this I noticed a more general problem with punctuation after italicized titles ending with question marks or exclamation points. This will be addressed in forthcoming revisions both of biblatex and of this package.

- Nick also reported some problems with spurious punctuation in the bibliography when using XeLaTeX. I haven't yet been able to pin down the exact cause of these, but if you are using XeLaTeX and are having (or have solved) similar problems I'd be interested to hear from you.

0.8.2: Released November 3, 2008

- Fixed several formatting glitches between citations in multicite commands (spotted by Joseph Reagle) and also after some prenotes.

0.8.1: Released October 22, 2008

Obsolete and Deprecated Features:

- The **origlocation** field is now obsolete, and has been replaced by **lista**. Please update your .bib files accordingly.

- The single-letter **\bibstring** commands I provided in version 0.7 are now deprecated. In most cases, you'll be able to take advantage of the automatic contextual capitalization facilities introduced in this release, but if you still need the single-letter \bibstring functionality then you should switch to \autocap, as I shall be removing the single-letter bibstrings in a future release. See above under **\autocap** for all the details.

- The **userd** field is now deprecated, as biblatex 0.8 allows all forms of data to be included in the edition field. I shall be removing userd in a future release, so please update your .bib files as soon as is convenient.

Other New Features:

- Updated the .bbx and .cbx files to work with biblatex 0.8. This most recent version of biblatex is now required for biblatex-chicago-notes-df to work.

- Added the **usera** field, which holds supplemental information about a journaltitle in article and review entries. See the documentation of the field for details.

- Added the **\citetitles** multicite command to fix a problem with spurious punctuation when multiple titles were listed.

- Added the **\Citetitle** command to help with automatic capitalization of titles when they occur at the beginning of a note.

- Minor punctuation fixes in biblatex-chicago-notes-df.bbx.

To Do:

- Integrate biblatex's American punctuation facilities.

- Separate out "options" from the basic citation "style," using a LaTeX style file. This is an architectural change recommended by Lehman.

- Investigate and possibly integrate the new entry types provided in biblatex 0.8.

0.7: First public release, September 18, 2008