# User's Guide to Historian

**A Footnotes-and-Bibliography Style, Following Turabian/Chicago Guidelines:**

**For Use with the `Biblatex` System of Programmable Bibliographies and Citations**

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The files `historian.bbx`, `historian.cbx`, and `historian.lbx` implement a bibliography and citation style for use with Philipp Lehman's `biblatex` package. Historian follows the conventions of *The Chicago Manual of Style,* as presented in Turabian's *Manual for Writers.* The style is designed for use by historians who need to generate detailed footnotes not only for ordinary books and articles, but also reprint editions, correspondence, archives and archival documents, online sources, book reviews, unpublished manuscripts, and conference presentations.

## Contents

# 1 Introduction

`Historian` is a formatting style for `biblatex`, by Philipp Lehman. Please see Lehman's documentation[1] for information on how to set up the programmable bibliography system and your BibTeX reference libraries.

`Historian` comprises a bibliography style file (`historian.bbx`) and a citation style file (`historian.cbx`), which use the LATEXmacros supplied by `biblatex` to implement the conventions of the "Chicago" style, as explained and illustrated, by Turabian. See the Turabian manual for definitive information about the formatting rules and for more examples.[2]

`Historian` was developed for my own use as a historian of science, with special attention to the formatting of scholarly articles, books, letters, and archival documents. It will also format every other kind of reference discussed in the Turabian manual.

## 1.1 License

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## 1.2 Feedback

Send any feedback and bug reports by e-mail to the address given above. Include your .bib entry, cite command, and preamble in your bug report.

# 2 Setting Up Your Files

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1. `www.ctan.org/tex-archive/help/Catalogue/entries/biblatex.html`

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

3. `http://www.ctan.org/tex-archive/macros/latex/base/lppl.txt`

## 2.1 Prerequisites

### 2.1.1 Requirements

1. A working installation of `biblatex`

2. The standard `biblatex`, `cbx`, and `bbx` files.

3. The files `historian.bbx`, `historian.cbx`, and `historian.lbx`.

4. BibTeX as a database frontend, with record and field types set up as required by `biblatex` and detailed further below. (I have not yet tried to use `biber`.)

5. The `babel` package for multilingual typesetting, with `american` as the main language option. Other language options may be given *in addition* to `american` (many of the entries in this file use `german`, for example), but `historian` requires `american` as the main option. It also needs `american` to be selected when it is called to format a citation or bibliography.

### 2.1.2 Recommended

The hyperref package for hyperlinks within the document and to urls.

`biblatex` and `historian` should work with most LaTeXdocument classes. I have been testing it mainly under `memoir`. See the `biblatex` documentation for details on compatibility with the LaTeXclasses.

### 2.1.3 Incompatible packages

See the `biblatex` documentation.

## 2.2 A Sample Preamble For Use With `Biblatex` and `Historian`

Enter your preferred \documentclass, then:

```
%Required packages
\usepackage[utf8]{inputenc} %Other encodings also ok, just not utf8x
\usepackage [english,
            german,
            american]        %``american'' goes last, as main option.
            {babel}
\usepackage [babel=once,      %Sets quote style once for whole document
            english=american] %American quote style
            {csquotes}
%Load Biblatex and Historian, with recommended options
\usepackage
[style=historian,      %Loads the Historian files
sorting=nty,           %Sorts bibliography by name, title
autocite=footnote,     %Autocite command generates footnotes
babel=hyphen,          %Allows hyphenation rules for foreign languages to
                            %apply to individual entries.
                            %(The other language rules should all be American)
mincrossrefs=1,        %Includes all x-ref'ed entries in the bibliography
```

```
usetranslator=true,    %Translator's name may be substituted for
                                %author or editor, if the latter are blank
printseries]           %Options provided by Historian, see below
{biblatex}

%Link Biblatex to your \bibtex database
\bibliography{historian}

%Change the footnote numbers from superscript to on-baseline
%numbering in the footnotes. (Preferred by Turabian, but not required.)
\makeatletter
\renewcommand\@makefntext{\hspace*{2em}\@thefnmark. }
\makeatother

%Add empty line between footnotes, and print in same
%font size as main text
\footnotesep\baselineskip
\renewcommand\footnotesize{\normalsize}
%Or in the memoir class:
%\renewcommand{\foottextfont}{\normalsize}
```

## 2.3 Preamble- and Entry Options

In addition to the package options defined in `biblatex`, `historian` provides the
following:

annotation=true, false                                    default: false

This option, which may be set to true or false globally in the preamble, or on a
per-entry basis in the `options` field, causes the `annote` field (or the contents of
an external annotation file—see the `biblatex` documentation) to be printed in the
bibliography. The value `true` is omissible. Entering `annotation` without a value is
equivalent to `annotation=true`. For an example of an entry with the entry option
`annotation`, see Evans in the bibliography.

citepages=permit, suppress, omit, separate                default: omit

As in the `verbose` styles, this option determines how the page ranges of `@articles`
(from the `pages` field) will be handled when there is also a page or page range in
the `postnote` argument. It is defined as a package option, not on a per-entry basis.

omit       When this option (or no option at all) is set, `historian` omits the
           page range from the `pages` field whenever it also finds a page range in
           the `postnote`. (Caution: if there is additional text in the `postnote`,
           `historian` might fail to recognize it as a page range. See 17.2.5, below,
           for what to do.)

permit     The page range from the `pages` field is always printed (i. e., duplication
           is permitted).

| | |
|---|---|
| suppress | The page range from the `pages` field is never printed. |
| separate | The page range from the `pages` field is always printed, as under the `permit` option, but if there is a page range in the `postnote` as well, it is separated off by the bibstring `thiscite`, e. g., "…100–150, esp. 125." |

**doi**=true, false                                                               default: `true`

The `doi` option is defined as in the standard style and causes `historian` to print all available `dois` and. This option can be set globally in the preamble, as in the standard style, or on a per-entry basis, by entering `doi` (equivalent to `doi=true`), or `doi=false` in the data field `options`.

**eprint**=true, false                                                            default: `true`

The `eprint` option is defined as in the standard style and causes `historian` to print all available `eprint` data. This option can be set globally in the preamble, as in the standard style, or on a per-entry basis, by entering `eprint` (equivalent to `eprint=true`), or `eprint=false` in the data field `options`.

**printseries**=true, false                                                       default: `false`

By default, `historian` does not include the titles of book series. This option, which may be set to true or false globally in the preamble, or on a per-entry basis in the `options` field, causes the `series` to be printed. As above, the value `true` is omissible. Entering `printseries` without a value is equivalent to `printseries=true`. (This option does not affect the `series` field of `@article` or other article-like entrytypes, which is always printed when it is not empty.)

**printnoterefs**=true, false                                                     default: `true`

By default, when a citation is repeated, `historian` behaves similarly to `verbose-inote`, by generating either an *ibid.*or a short form with a cross-reference to the first citation (i. e., "see note—." Such crossreferences are not prescribed by Turabian and can be suppressed with the option `printnoterefs=false`, either globally as a package option, or on a per-entry basis in the `options` field. (The idea behind the entry-option is that For some letters and archival documents without proper titles, the standard short forms might be ambiguous and the noteref desirable, even when it is generally turned off.)

**reprint**=origfirst, addorig, transas, transfrom, optnone                       default: `none`

This option tells `historian` how to interpret and format data in the `@book`- and `@collection` fields, `origtitle`, `origpublisher`, `origlocation`, and `origdate`, which are used when citing a reprint edition or translation. (`Historian` does not use `origlanguage`.)

Turabian allows for several different ways of printing publication data from both the original and the reprint/translation in the same entry, and `historian` implements them as follows:

| | |
|---|---|
| none | When this option (or no option at all) is set, `historian` ignores all the `orig`–fields. |

origfirst  The option `reprint` or `reprint = origfirst` gives the original publication data first and adds the reprint data, all in one block, as follows:...(origlocation: origpublisher, origdate; repr., location: publisher, year). `Origtitle` is not used. This option can be set globally in the preamble, or on a per-entry basis in the `options` field.

addorig  This option cites the reprint first, and adds the original publication data at the end. Unlike `origfirst`, `addorig` prints `origtitle`. The original publishing data are printed as follows:...Originally published as *origtitle* (origlocation: origpublisher, origdate). This option can be set globally in the preamble, or on a per-entry basis in the options field.

transfrom  This option is for citing translated books and adding their original titles and publication data at the end of the note. It cannot be set globally, but only on a per-entry basis in the `options` field. It is only appropriate for `@book` entries that include translation data in the `orig`-fields, and is important for distinguishing a translation from a reprint. Under this option, the translation data are printed first, then the following:...originally published as *origtitle* (origlocation: origpublisher, origdate).

transas  This option is for citing books and their translations in the same note. It cannot be set globally, but only on a per-entry basis in the `options` field. It is only appropriate for `@book` entries that include translation data in the `orig`-fields, and is important for distinguishing a translation from a reprint. Under this option, the `orig`-fields become the main entry and are printed first, followed by: ...Translated by translator as *title* (location: publisher, year).

doubledate  This option from `historian-rl` has no effect in `historian`.

**shortincoll**=true, false                                                    default: `false`

Use this option in order to abbreviate the book- or collection data in bibliography entries for `@inbook` or `@incollection`. Only works when the data is in a separate entry, linked by `xref`. This option may be set to true or false globally in the preamble, or on a per-entry basis in the `options` field. See also 17.1.8

**url**=true, false                                                             default: `true`

The `url` option is defined as in the standard style and causes `historian` to print all available `url`s and `urldate`s. This option can be set globally in the preamble, as in the standard style, or on a per-entry basis, by entering `url` (equivalent to `url=true`), or `url=false` in the data field `options`.

**shortauthor**=true, false                                                     default: `true`

Set the option `shortauthor` or `shortauthor = true`, in order to substitute the `shortauthor` for the `author` in the footnotes. This option can be set only on a per-entry basis, in the `options` field. It is intended mainly for use with public documents. It does not apply to the entrytype `@legislation`, which will always use `shortauthor` in the footnotes.

Set the option `shorttitle` or `shorttitle = true`, in order to substitute the `shorttitle` for the `title` in the footnotes. This option can be set only on a per-entry basis, in the `options` field. It is intended mainly for use with public documents.

# 3 Citation Commands

The citation commands of `historian` are based on those of `biblatex`'s `verbose-inote` style and handle repeated citations mostly in the same way, using "ibid."or an author/author-title short form and a cross-reference to the first citation. `Historian` adds a few special short forms prescribed by Turabian for certain types of entries, and it allows the cross-referencing to be turned off, using the `printnoterefs=false` (see 2.3, above).

    `Historian` is intended primarily for generating footnotes (and their corresponding bibliography entries), using `\footcite`. The `\cite` command is also available, but should not be needed (except perhaps within a complex footnote, in which case it will call up the `\footcite` routines.

    If the package options are set as in this demo file, the style-independent commands, `\autocite` and `\autocites` will execute `\footcite` or `\footcites`. In the examples below, the variant `\autocites` is used almost exclusively, which also allows for multiple citations in one command.

## 3.1 Standard Footnoting Commands

`\autocite`[⟨*prenote*⟩][⟨*postnote*⟩]{⟨*key*⟩}

Or, for more complex notes, use the multicite form:

`\autocites`(⟨*pre*⟩)(⟨*post*⟩)[⟨*pre*⟩][⟨*post*⟩]{⟨*key*⟩}...[⟨*pre*⟩][⟨*post*⟩]{⟨*key*⟩}

Also useful is the `\blockcquote` command provided by the `csquote` package, which formats a quotation and its associated citation at the same time.

`\blockcquote`[⟨*prenote*⟩][⟨*postnote*⟩]{⟨*key*⟩}[⟨*<punctuation>*⟩][⟨*<quotation>*⟩]

The `historian.cbx` file sets the `\SetCiteCommand` parameter to make the `\blockcquote` execute a `\footcite`.

## 3.2 Special Form for In-Line Citations

Turabian allows for occasional use of author-title citations, in parentheses. For this purpose, `historian` provides a special version of the `\parencite` command:

`\parencite`[⟨*prenote*⟩][⟨*postnote*⟩]{⟨*key*⟩}

In `historian`, `\parencite` generates only author-title citations and puts them in parentheses.

All the other citation commands from the `verbose-inote` style are also available in `historian`, with little or no modification. They are not demonstrated in this file, because they do not seem to be needed under Turabian rules.

### 3.3 Special Forms With Modified Punctuation or Placement of Postnote

In addition, `historian` provides the following citation commands for special situations that might require different punctuation from the usual `\footcite` command:

`\footcitecolon`[⟨*prenote*⟩][⟨*postnote*⟩]{⟨*key*⟩}

Same as `\footcite`, but generates a colon before the `postnote` argument, instead of the usual comma. Also suppresses the `pages` field of `@article`s, unless the `postnote` is empty. Intended for use in citing specific pages of an `article`, as explained in 17.2.5, below.

`\footcitedot`[⟨*prenote*⟩][⟨*postnote*⟩]{⟨*key*⟩}

Same as `\footcite`, but generates a period before `postnote`, instead of a comma. May be useful when `postnote` contains a full sentence of commentary instead of a page range.

`\footcitenodot`[⟨*prenote*⟩][⟨*postnote*⟩]{⟨*key*⟩}

Same as `\footcite`, but generates no punctuation (and no space) at all before `postnote`. Any desired punctuation can be entered manually. Where no punctuation is needed, just add the space.

`\citecolon, citedot, citenodot`

Same as the previous three, but do not automatically generate a footnote. Intended for use within a LATEX `\footnote` command,[4] in cases where close manual control of the punctuation is needed.

`\footcitedots`[⟨*prenote*⟩][⟨*postnote*⟩]{⟨*key*⟩}

A multicite command with periods separating the individual citations instead of semicolons. May be useful for long footnotes with discursive comments in the `postnote`s.

`\footciteurllast`[⟨*prenote*⟩][⟨*postnote*⟩]{⟨*key*⟩}For printing the postnote before the url or other online locators. Not for use with multiple entry keys. See 17.1.10, below.

`\citeurllast`[⟨*prenote*⟩][⟨*postnote*⟩]{⟨*key*⟩}Same as `\footciteurllast`, but does not automatically generate a footnote. Intended for use inside a LATEX `\footnote`.

### 3.4 Special Forms for Annotations

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4. If used in the main text, they will still work, but repeated citations might not be handled as you expect.

`\citeannote{⟨key⟩}`

> For annotated citations in the main text—not required under Turabian, but sometimes useful. Prints the reference, followed by the `annote` field (or the contents of an external annotation file—see the `biblatx` documentation). Allows for greater flexibility in sorting the references and interspersing text than in annotated bibliographies.[5] Example:
>
> JoAnn M. Burkholder et al., "New 'Phantom' Dinoflagellate is the Causative Agent of Major Estuarine Fish Kills," *Nature* 358, no. 6385 (1992): 407–410.
>
> > The killer dinoflagellate that eats fish in east-coast estuaries.

# 4 Data Types

## 4.1 Entry Fields

It is assumed that users of `historian` are already familiar with `biblatex` and its standard bibliography styles, so only *differences* in field usage are noted in this section. See the `biblatex` documentation for the full list of fields and further explanation.

abstract  field (literal)

> Not printed out by `historian`.

authortype  field (key)

> The type of author. Flags certain `author` fields for special handling by `historian`.
>
> `anonymous`  Enter "anonymous" for authors whose names do not appear in the publication, but are known or surmised.
>
> `anonymous?`  Add the question mark when authorship is uncertain.
>
> `redundant`  Enter "redundant" when the author's name is also part of the title, and therefore redundant. `Historian` omits such names in the footnotes and begins the reference with the title instead. The name and title both appear in full in the bibliography, however.
>
> `journal`  Use when authorship is to be attributed to the journal as a whole, instead of to a named individual.

booktitle  field (literal)

> Used not only for books, but for other media, such as `@audio` recordings, when the `title` field refers to an individual track, or `@online` sources that are contained within larger pages or sites.

---

5. But caution when citing a reference more than once; the citation tracker tracks in-text citations separately, and makes cross-references to section numbers instead of footnote numbers. To avoid confusion, it is best to suppress to cross-refereces, using the option `printnoterefs=false`.

**chapter**  field (literal)

> `Historian` will print chapter numbers in `@inbook`, `@incollection`, and `@inproceedings`, but page ranges are preferred under Turabian guidelines.

**date**  field (date)

> `Historian` generally expects every record to have a date (exceptions for records of type `@online`, for which dates will often not be available, and for archival collections of type `@customa`). Non-standard dates that cannot be formatted to fit the requirements of the `date` field should be entered in `year`. If neither `date` nor `year` is used, `historian` will try to substitute `pubstate` for the date. If all else fails, the string "n. d." (for "no date") will be generated to fill the void.

**editortype**  field (key)

> The type of editor. This field will affect the string used to introduce the editor. Currently `biblatex` supports the types "editor" and "compiler". `Historian` adds "corporate", for the special case of a `@proceedings` or `@inproceedings` in which the editor and the sponsoring organization are the same. In such cases, the editor string and the organization are suppressed.

**eid**  field (literal)

> Not printed by `historian`.

**eventdate**  field (date)

> The date of the event named in `eventtitle` (see below).

**eventtitle**  field (literal)

> The title of a conference, symposium, etc. in `@proceedings`, `@inproceedings` and `@unpublished` entries, or of a recorded concert in `@audio`. Use `eventdate` and `venue` for further information about the event.

**file**  field (verbatim)

> Not printed by `historian`.

**howpublished**  field (literal)

> Publication data for entries without a conventional publisher. When processing any of the book-like entrytypes, including `@misc` and `@booklet`, it is only used as a fallback. `Historian` always tries to use `publisher` first. If `publisher` is empty, it then looks for an `institution`, and if that fails, it prints the contents of `howpublished`. Non-print entrytypes such as `@audio`, `@video`, or `@online` will print out both the `publisher` and `howpublished` fields.

**institution**  list (literal)

> The name of a university (in `@thesis`) or some other institution, depending on the entry type. Used as a fallback for publisher in the book-like entrytypes (similar to `howpublished`, above).

**isan** field (literal)

Not printed out by `historian`.

**isbn** field (literal)

Not printed.

**ismn** field (literal)

Not printed.

**isrn** field (literal)

Not printed.

**issn** field (literal)

Not printed.

**iswc** field (literal)

Not printed.

**language** list (key)

Not printed.

**library** field (literal)

The name of the library or collection where an archival document can be found. Used in the custom entrytypes for archival sources, `@customa`, `@customd`, and `@letter`.

**location** field (list)

Used not only in `@book`s and book-like entrytypes, but also in `@Article`s of entry-subtype "newspaper."

**nameaddon** field (literal)

An add-on to be printed immediately after the author name. Use for an alias or pen name, or "[pseud.]" to indicate that the name is a pseudonym.

**origlanguage** field (key)

Not printed.

**origlocation** list (literal)

If the work is a translation or reprint, the `location` of the original edition.

**origpublisher** list (literal)

If the work is a translation or reprint, the `publisher` of the original edition.

**origtitle**  field (literal)

If the work is a translation or reissue of a book under a new title, the `title` of the original work.

**origdate**  field (range)

If the work is a translation or reprint, the year of publication of the original edition.

**pagetotal**  field (literal)

Not printed.

**pubstate**  field (key)

The publication state of the work. Predfined bibstrings are available for keys "inpress" and "submitted." Turabian prefers "forthcoming" which must be written out. `Historian` uses this field as a fallback, in case no publication date is given.

**reprinttitle**  field (literal)

Not printed.

**shortjournal**  field (literal)

Not printed.

**shortseries**  field (literal)

Not printed.

**type**  field (key)

The type of a `manual`, `@booklet`,`@misc`, `@unpublished`, `@customd`, `@letter`, `report`, or `thesis`. (Also occurs in `patent`, which is not supported by `historian`.)

**venue**  field (literal)

In the `@proceedings` and `@inproceedings` entries, the location of the conference is given in the `venue` field. In `@letter` and `@customd` this field is used for the place where the letter or other document was written.

**version**  field (literal)

Not used in `@article`.

**year**  field (literal)

From `biblatex` version 9 on, the `date` field is preferred, but `year` can still be used and has the advantage of being able to handle non-numeric data, so it can be used for imprecise or uncertain dates such as "ca. 1900" or "[1900?]" or even for texts such as "forthcoming" or "in press" (although these are better placed in `pubstate`.

## 4.2 Special fields

See the `biblatex` documentation.

## 4.3 Custom fields

`Biblatex` provides some custom fields for use in special bibliography styles. The following are implemented in `historian`:

namea    list (name)

In special cases, where a `@report` has an institutional `author`, but also credits an individual, the custom name field `a` (a, for author) is available for such a secondary author.

nameb    list (name)

In special cases, where a `@collection` entry represents an edited volume within a multivolume set, and the volume and the set have different editors, use custom name field `b` (b, for big editor) for the editor of the multivolume set. The volume editor goes in the standard `editor` field.

namebtype    field (key)

Similar to `authortype` and `editortype` but referring to the field`nameb`. May be used to enter a string with to describe the function of the editor named in `nameb`, for example, "general editor."

namec    list (name)

In letters or other communications of entrytypes `@letter` or `@customd` use the custom name field `c` (c, for correspondent) for the name of the recipient of the communication. The name of the sender in the standard `author` field.

usera    field (literal)

Custom field `a` (a, for article or archive) has two unrelated uses

One use is in `@inbook`, `@incollection` and `@incollection`-like entrytypes. In the case of articles or other short works reprinted in anthologies, this field gives the original year of publication—not of the collection as a whole, which would go in `origdate`, but of the shorter work referred to in the `title` field. In footnotes, `usera` appears in parentheses after `title`. In the bibliography, the parentheses are omitted.

It is also used for call numbers or other codes needed in `@customa` entries for locating the archive or collections within the library or institution. It may also be needed sometimes in `@online`, to locate it on a larger website, when it plays a similar role as the target of an `xref`. `Userd` is then used for the locating information of the x-referencing item.

userb    field (literal)

User-defined field `b` (*b* for book), is used in `@inbook`, `@incollection` and `@incollection`-like entrytypes, in rare cases of multilevel nested citations, where another year-field is needed in addition to `origdate` and `usera`. `userb` gives the year of original publication of the work referred to in `booktitle`. (`Origdate` then goes with `maintitle`, and `usera` with `title`.) In footnotes, `userb` appears in parentheses after `booktitle`. In the bibliography, the parentheses are omitted.

**userc** field (literal)

Custom field `c` (c, for catalog), is for a special addendum to the publishing information, which is printed only in the bibliography, not the footnotes. Intended mainly for exhibition catalogs, to give additional information about the title and venue of the exhibit.

**userd** field (literal)

Custom field `d` (d, for document), is for call numbers or other codes needed for locating individual documents (of entrytype `@customd` or `@letter` or `@online`) *within* a larger collection, archive, website, or other `xref`-ed item. Not to be confused with `usera`, which helps locate the collection or archive, etc., as a whole.

Also used for inventory or catalogue numbers of audio recordings or names or paths of online multimedia files.

**usere** field (literal)

Custom field `e` (e, for English) is used to provide translations of foreign-language titles.

### 4.3.1 Field aliases

See the `biblatex` documentation.

## 5 Entrytypes

The following is a list of the bibliographic entry types, as supported by the `historian` style. The distinction between required and optional fields is taken over from the `biblatex` documentation, but the system is actually quite tolerant of empty fields, even if they are listed as "required." The `author` field, for example, is nominally required, but anonymous sources may be entered with the author field simply left blank. (Anonymous sources are formatted with the title first and are alphabetized by title.)

Some entry types have subtypes, distinguished by the contents of the field `entrysubtype`.

**article** An article in a journal, magazine, newspaper, or other periodical which forms a self-contained unit with its own title. May also be used for certain kinds of public documents.

Entrysubtypes of `@article`:

default    Leave `entrysubtype` blank for articles in scholarly journals and other periodicals with numbered volumes.

"magazine" For articles in magazines (punctuated differently from journal articles, and uses dates instead of volume numbers).

"newspaper" For newspaper articles (like magazine, but appears in footnote only, not in bibliography; adds city, and omits page numbers).

"gov"    For government documents (e. g., congressional publications, bills, resolutions) published in journal-like series such as the *Congressional Record.*

"from," "to," and "none" For articles *in* a special issue of a journal, in the rare cases when the preposition "in" is inappropriate. Similar to the subtypes of @inbook, below.

Required fields:  author, title, journaltitle, date

Optional fields:  editor, translator, redactor, annotator, commentator, authortype, nameaddon, type, subtitle, titleaddon, usere, type, journalsubtitle, issuetitle, issuesubtitle, location, series, volume, number, issue, year, pages, note, addendum, doi, eprint, eprinttype, url, urldate

Usage notes: titleaddon is printed after the title and subtitle, but outside the quotation marks. Use it for adding the name of the department, column, or type of article (e. g.,, "editorial," or "obituary for . . . .") If the article is a book review, it should be used for the title and author of the book under review (enter, e. g., "book review of *title* by author").

The note field is printed between the issue title and the journal title and is intended for information about the issue, such as "special issue."

Enter "journal" in authortype in special cases, where the journal itself functions as the author.

In citations of subtype "gov," title is italicized as well as journaltitle. Type is also intended for use with government documents (even if they do not require italicized titles and subtype "gov"). It goes before title and is printed in roman type.

artwork  Works of the visual arts such as paintings, sculpture, and installations.

Same as @customd.

audio  Audio recordings, typically on audio cd, dvd, or audio cassette. See also @music.

Entrysubtypes of @audio:

default   Leave entrysubtype blank for most sorts of recordings.

"book"    For book-like italicization of titles, e. g., of audiobooks or recordings of plays or other long pieces.

Required fields:  author, title, date

Optional fields:  subtitle, titleaddon, booktitle, note, venue, type, series, authortype, nameaddon, organization, institution, publisher, howpublished, eventtitle, eventdate, usera, userd, eprint, eprinttype, doi, url, urldate, addendum, year, pubstate

Usage notes: There are no dedicated fields for the names and roles of performers, directors, producers, etc. Write these out in the note field. The howpublished field can be used for distributors, and publisher for production companies; venue, eventtitle and eventdate for concerts and other non-studio recordings; type for the recording medium; and usera and userd for collection and catalog numbers.

book     A book with one or more authors where the authors share credit for the work as a whole. For anthologies or other edited books, use entrytype `@collection` (or, possibly, `@proceedings` or `@reference`).

Entrysubtypes of `@book`:

default     Leave `entrysubtype` blank for conventionally published books.

"online"     For electronic books or books for which urls and other electronic locators should always be printed. This subtype overrides the option `printurls=false`.

"classic"     For classical literature or other well-known and widely available and standardized texts, for which it is not necessary to give full publishing information.

"canon"     Similar to "classic," but for canonical literary works and other well-known books and plays, for which full publishing details are not needed.

"biblical"     Similar to "classic," but for sacred texts whose titles do not need to be italicized.

Required fields:   `author`, `title`, `date`

Optional fields:   `editor`, `translator`, `redactor`, `annotator`, `commentator`, `introduction`, `foreword`, `afterword`, `authortype`, `nameaddon`, `subtitle`, `titleaddon`, `maintitle`, `mainsubtitle`, `maintitleaddon`, `usere`, `volume`, `part`, `edition`, `volumes`, `series`, `number`, `note`, `publisher`, `location`, `origtitle`, `origlocation`, `origpublisher`, `origdate`, `userb`, `chapter`, `pages`, `addendum`, `doi`, `eprint`, `eprinttype`, `url`, `urldate`, `year`, `pubstate`

Usage notes: Use the `reprint` option to tell `historian` how to interpret and where to print the original publication data from the fields `origtitle`, `origlocation`, `origpublisher`, and `origdate`.

bookinbook     Same as `entrysubtype` "volume" of `@inbook`.

booklet     A book-like work without a conventional publisher or sponsoring institution.

Turabian does not distinguish between books and booklets or pamphlets, so the differences under `historian` are minor.

Entrysubtypes of `@booklet`: Same as `@book`

Required fields:   `author/editor`, `title`, `date`

Optional fields: same as `@book`, plus `howpublished`, `type`

Usage notes: Entrytype `@book` (or `@collection` for booklets with editors instead of authors) can almost always be used instead of `@booklet`, even for pamphlets, mimeographed or photocopied items, or products of desktop publishing. The `publisher` field can hold phrases such as "privately published," "by the author," or "mimeographed."

Example of pamphlet as `@book`.[6] Entrytypes `@report, unpublished,` or `misc` might also be appropriate in individual cases.

---

6. Here is a government pamphlet, entered and formatted as `@book`, using the `series` and `number` fields for the government division and the pamphlet number,

Example of pamphlet as `@booklet`. Publishing information will be taken from `howpublished`, as long as `@publisher` is empty. the field `type` can also be used to describe the item, if it is not a book.[7]

collection A book with multiple, self-contained contributions by distinct authors, each with its own title. The work as a whole has no author but it will usually have an editor.

Entrysubtypes of `@collection`: "online," which functions the same here as in `@book`, above.

Required fields:  `editor`, `title`, `date`

Optional fields:  `Same as in @book.`

image Visual images and similar media. Same data entry and formatting as `@customd`

inbook A section of a book which forms a self-contained unit with its own title. `Entrysubtypes` of `@inbook`:

| | |
|---|---|
| `default` | Leave `entrysubtype` blank for most sorts of titled book sections. |
| `"to"` | Replaces the preposition "in." Intended for references to introductions, forewords, prefaces, etc., "to" the book. |
| `"from"` | For references to generically titled sections "from" the book. |
| `"none"` | To suppress the linking preposition altogether. |
| `"volume"` | For references to entire volumes in multivolume sets. Sets the title in italics instead of quotation marks. |
| `"canon"` | For references to canonical English literature and other standard texts, for which full publication data are omissible. |
| `"video"` | For the special case of a part of a video recording. |

Required fields:  `author`, `title`, `booktitle`, `date`

Optional fields: same as `@book`, plus `bookauthor`, `booksubtitle`, `booktitleaddon`, `xref`, and, for entrysubtype "video,"also `type`.

Usage notes: Entrytype `@inbook` has fields for all the data required to cite both the book section and the book from which it comes, as in the standard `biblatex` styles, but `historian` also offers a two-entry option. The book data may be entered in a `@book` of its own, and the `@inbook` is then linked to it by means of its `xref` field. The entry key of the `@book` goes in the `xref` of the `@inbook`. (If `xref` is empty, `historian` will attempt to link through the `crossref` field, but `xref` is preferred. If no cross-reference is found, `historian` uses only what is in the `@inbook` entry.)

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and the `publisher` field for the state board: *The Facts about Venereal Diseases* (Jefferson City, MO: Missouri State Board of Health, Division of Venereal Diseases, 1921).

7. Same pamphlet as in the previous note, but entered as a booklet, with "pamphlet" in the type field, and the board and division, etc., in the howpublished field: *The Facts about Venereal Diseases*, pamphlet (Jefferson City, MO: distributed by the Missouri State Board of Health, Division of Venereal Diseases, 1921).

With `entrysubtypes` `to` and `from`, use `titleaddon` to enter the generic titles, such as introduction, or foreword, so that they do not go in quotation marks.

incollection  A contribution to a collection which forms a self-contained unit with a distinct author and title. The `author` refers to the `title`, the `editor` to the `booktitle`, i. e., the title of the collection.

Entrysubtypes of `@incollection`:

default  Leave `entrysubtype` blank for most sorts of titled book sections.

`"to"`  Changes the preposition from "in." For references to introductions, forewords, prefaces, etc., "to" the collection.

`"from"`  For references to generically titled sections "from" the book.

`"none"`  To suppress the linking preposition altogether.

`"volume"`  For references to entire volumes in multivolume sets.

`"canon"`  For references to canonical English literature and other standard texts, for which full publication data are omissible.

`"gov"`  For the special case of government documents, collected into book form and requiring italicized titles.

Required fields:  `author`, `editor`, `title`, `booktitle`, `date`

Optional fields:  same as `@inbook`, but without `bookauthor` and with `nameb`, `namebtype`

Usage notes: The custom name- and nametype-fields are for the special case of an edited volume within a multivolume edited collection. If the single volume and the multivolume set have different editors, a second editor field is needed. Use the `nameb` (b, for big book editor) for the editor of the set as a whole. Use the associated `namebtype` for a brief descriptor of the editor's role, such as "general editor" or "editor in chief," or leave blank and the usual "ed."/"editor" strings will be generated.

As is the case with `@inbook`, above, an `@incollection` entry may contain either the actual publication data from the collection or a cross-reference (in `xref`) to the `@collection` entry.

inproceedings  An article in a volume of conference proceedings. This type is similar to `@incollection`, but with some additional fields.

Entrysubtypes of `@inproceedings`: same as `@incollection` and `@inbook`

Required fields:  `author`, `editor`, `title`, `booktitle`, `date`

Optional fields: same as `@incollection`, plus `eventtitle`, `eventdate`, `organization`, `venue`, `editortype`

Usage notes: The additional fields are `organization`, for the organization, corporation, or institution that sponsored the conference or other event whose proceedings were recorded; `venue`, for the city where the conference or event was held, and `eventtitle` and `eventdate` for the name and date of the conference or event. There is also special handling of corporate editors, when "corporate" is entered in `editortype`.

**inreference**  For entries in well-known encyclopedias, dictionaries, and other reference books for which full publishing data are not required. Similar to `@incollection`, except that it is shortened and intended for footnotes only.

Entrysubtypes of `@inreference`: same as `@incollection`

Required fields:  `author`, `editor`, `title`, `booktitle`, `date`

Optional fields: same as `@incollection`.

**jurisdiction**  For references to court decisions, the U. S. Constitution, or other legal documents with titles that need to be set in roman type and that require only minimal publishing data to be printed out. Intended for footnotes only. Uses special short forms in repeated citations.

Required fields:  `title`

Optional fields:  `type`, `subtitle`, `titleaddon`, `note`, `pages`, `institution`, `date`, `year`, `pubstate`, `addendum`, `doi`, `eprint`, `eprinttype`, `url`, `urldate`

Usage notes: `Institution` is intended for the name of the court deciding a case. `Type` and `titleaddon` are available for information that might need to precede or follow the title.

**legal**  For references to statutes, especially those published in journal-like series. Intended for footnotes only. Uses special short forms in repeated citations.

Required fields:  `title`

Optional fields:  `type`, `subtitle`, `titleaddon`, `note`, `pages`, `date`, `year`, `pubstate`, `journaltitle`, `journalsubtitle`, `volume`, `part`, `number`, `issue`, `issuetitle`, `issuesubtitle`, `series`, `addendum`, `doi`, `eprint`, `eprinttype`, `url`, `urldate`

**legislation**  For public documents of all sorts, including, but not limited to legislation (e. g., government reports, proclamations, treaties, congressional hearings).

Entrysubtypes of `@legislation`: none

Required fields:  `author`, `title`

Optional fields:  `namec`, `type`, `subtitle`, `edition`, `note`, `institution`, `publisher`, `howpublished`, `date`, `addendum`, `doi`, `eprint`, `eprinttype`, `url`, `urldate`

Usage notes: Always substitutes `shortauthor` (if available) for `@author` in footnotes. Uses special short forms for repeated citations.

For the sake of flexibility, many optional fields are available for identifying data. They are printed in the order: author, type, title, subtitle, and so on, as in the preceding paragraph.

**letter**  Similar to `@customd`, except that the short form for repeated citations of the same `@letter` includes the name of the recipient.

Use for personal correspondence such as letters, emails, memoranda, or any document that has a recipient as well as an author.

`@Letter` may be used for letters found either in archives or in published collections. Use the `xref` feature of `biblatex` to link the individual letter to a collection of entrytype `@customa` (for archives) or `@collection` (for published collections). (Note that such x-referencing will make additional compiler runs through `bibtex` and LaTeXnecessary.

`Historian` adds all `@letter`s to the "noteonly" category, but the x-referenced `@customa` or `@collection` is intended for the bibliography.

Required fields: `author`, `namec`, `xref`

Optional fields: `title`, `titleaddon`, `date`, `year`, `pubstate`, `note`, `venue`, `type`, `volume`, `pages`, `library`, `userd`, `authortype`, `nameaddon`, `volume`, `pages`

Usage notes: Use `namec` for the name of the recipient. `Volume` and `pages` are for locating the item within a cross-referenced `@collection`, `userd` for locating the item within a cross-referenced `@customa` archive.

For non-standard, non-numeric dates, use `year` (or even `pubstate`). Additional explanation of the dating can go in the`note` field, which is printed immediately before the date.

If no x-reference is made, `historian` looks for archive data in the `@letter` entry itself, but this is not the intended use of the `@letter` type, and might not give satisfactory results.

manual  Technical or other documentation, not necessarily in printed form. May have an `author` or an `editor` (or neither). Historian treats `@manual` much like `@book`, but with some differences in the fields that are available.

Required fields: `author/editor`, `title`, `date`

Optional fields: same as `@book`, plus `type`, `version`, `organization`

misc  A fallback type for entries that do not fit into any other category, but are more-or-less book-like (i. e., not contained within another publication).

Use the field `howpublished` to supply publishing information in free format, if applicable. The field `type` is recommended for indicating what the item is, if not a book. `Author`, `editor`, and `date` are omissible.

`Historian` formats `@misc` like `@book`, `@booklet`, or `@manual`, with italicized title and publishing data in parentheses in the footnotes. There are some differences in the fields that are available.

Required fields: `author/editor`, `title`, `date`

Optional fields: same as `@book`, plus `howpublished`, `type`, `version`, `organization`

Usage notes: Publishing data is taken from `howpublished` only when `publisher` is empty.

movie  Same as `@performance`.

music  Musical recordings, typically on audio cd, dvd, or audio cassette. Same as `@audio`.

online     An online resource. This entry type is intended for sources such as web sites that are intrinsically online resources and cannot be adapted easily for entry as `@book`s or `@article`s.

All available online locators are always printed out for entries of this type, regardless of how the options are set.

All entry types support the `url` field and other online locators, so there is no need to enter everything that is online as `@online`. For example, when adding an article from a journal which happens to be available online, use the `@article` type and its `url` field (and set the `url`, or `doi` or `eprint` options accordingly).

`Entrysubtype`s of `@online`:

default     Leave `entrysubtype` blank for most web pages and other online sources, whose titles are to go in quotation marks.

`"blog"`     For references to blog entries and comments.

`"database"` For online databases, whose titles are to be printed in roman type.

`"book"`     For book-like italicization of titles.

Required fields:   `author/editor`, `title`, `date`, `url`

Optional fields:   `subtitle`, `titleaddon`, `booktitle`, `booksubtitle`, `booktitleaddon`, `version`, `note`, `organization`, `institution`, `publisher`, `howpublished`, `type`, `usera`, `userd`, `entrysubtype`, `date`, `day`, `month`, `year`, `pubstate`, `addendum`, `urldate`

Usage notes: `author`, `editor`, and `date` are omissible.

Turabian calls for access dates to go with all urls, so use `urldate`.

The amount of information required to characterize a web site, its authors and maintainers varies greatly. `Historian` therefore supports all the available `biblatex` fields for organizations, institutions, and publishers.

patent     A patent or patent request.

Patents are not covered by Turabian. `Historian` does not distinguish them from `@legislation`.

performance     Musical and theatrical performances as well as other works of the performing arts, including movies and television broadcasts. These entries are intended for footnotes only, not the bibliography, and their keys will automatically be added to the "noteonly" bibliography category.

`Entrysubtype`s of `@performance`:

default     Leave `entrysubtype` blank for most sorts of documents.

`"book"`     For performances of plays or other long pieces, whose titles need to be italicized like books.

Required fields:   `title`, `date`, `venue`

Optional fields:   `author`, `subtitle`, `titleaddon`, `year`, `pubstate`, `note`, `type`, `authortype`, `nameaddon`, `eventtitle`, `howpublished`, `publisher`, `origdate`, `eprint`, `doi`, `url`, `urldate`, `addendum`

Usage notes: There are no dedicated fields for the names and roles of performers, directors, producers, etc. Write these out freehand in the `note` or `titleaddon` field. If there is no appropriate name for the `author` field, leave it blank.

periodical
An entire issue of a periodical, such as a special issue of a journal. The title of the periodical goes in `title` (*not* `journaltitle`. If the issue has its own title in addition to the main title of the periodical, it goes in the `issuetitle` field. The `editor` is omissible.

Required fields: `editor`, `title`, `date`

Optional fields: `subtitle`, `issuetitle`, `issuesubtitle`, `series`, `volume`, `number`, `issue`, `year`, `pubstate`, `note`, `addendum`, `doi`, `eprint`, `eprinttype`, `url`, `urldate`

proceedings
The proceedings of a conference. This entrytype is very similar to collection, but with fields for the organization sponsoring the conference or event, the title and date of the event, and its venue. There is also a distinction between personal and corporate editors, depending upon the field editortype.

`Entrysubtypes` of `@proceedings`: same as in `@book` or `@collection`.

Required fields: `editor`, `title`, `date`

Optional fields: same as `@collection`, plus `eventtitle`, `eventdate`, `organization`, `venue`, `editortype`

Usage notes: The editor of the proceedings may be omitted. Corporate editors might have to be entered in curly brackets in order to prevent them from being split inappropriately into first and last names. The `venue` field is for the location of the conference or event—not to be confused with the place where the proceedings were published.

In `editortype`, enter "corporate" if the editor is an organization; leave blank if the editor field contains the name of a person or persons.

reference
Same fields and subtypes as collection, but printed out in a short form. Intended for the footnotes only, and added automatically to the "noteonly" bibliography category.

report
A technical report, research report, or white paper published e. g.,, by a university or other institution. Use the `type` field to specify the type of report. The sponsoring institution goes in `institution`. Formatted like `@book` or `@manual`, but with slightly different field usage.

Required fields: `author`, `title`, `type`, `date`

Optional fields: same as `@book`, plus `institution`, `type`, `version`, and `namea`

Usage notes: If `historian` finds a `publisher`, it will be printed instead of the `institution`. The field `namea` is for a secondary author, who appears after the title.

review
Same as article. Enter information about the reviewed item in the `titleaddon` field.

suppbook
Same as inbook.

suppcollection
Same as incollection.

**suppperiodical**  Same as article.

**thesis**  A thesis written for an educational institution to satisfy the requirements for a degree. Use the `type` field to specify the type of thesis.

Required fields:  `author`, `title`, `type`, `institution`, `date`

Optional fields:  `year`, `pubstate`, `subtitle`, `titleaddon`, `authortype`, `nameaddon`, `note`, `addendum`, `doi`, `eprint`, `eprinttype`, `url`, `urldate`

Usage notes: `location` is not used under Turabian guidelines. Enter "Phd diss." or "master's thesis" as `type`. To add the name of a database in which the thesis is available, use `addendum`.

**unpublished**  A work with an author and a title which has not been formally published, such as an article draft or the manuscript version of a talk. Use the fields `howpublished` and `note` to supply additional information in free format, if applicable. (Not intended for letters or archival documents; use `@letter`/`@customd` and `@customa` instead.)

`historian` offers more fields and structure for such unpublished papers than does the `biblatex` standard style.

Required fields:  `author`, `title`, `date`

Optional fields:  `year`, `pubstate`, `subtitle`, `titleaddon`, `nameaddon`, `authortype`, `eventtitle`, `organization`, `venue`, `howpublished`, `note`, `addendum`, `url`, `urldate`, `urlday`, `urlmonth`, `urlyear`

Usage notes: `date` cannot logically be the year of publication, but may be used for the year in which the talk was given or the manuscript prepared. `eventdate` is considered superfluous here and is ignored. If there is no numerical date, enter "forthcoming," "in preparation," or "unpublished" or "n. d." as may be appropriate in the `year` or `pubstate` field (since `date` cannot accommodate text).

Use the `howpublished` field to explain where the manuscript may be found, how it was circulated, or how and where the talk or paper was presented.

Enter "paper," "unpublished manuscript," "powerpoint presentation," or any other appropriate description in the field `type`.

In the case of conference presentations, use the fields `eventtitle`, `eventdate`, `venue`, and `organization` as in `@inproceedings` to describe the conference.

**video**  Audiovisual recordings, typically on dvd or vhs cassette or in online multimedia files.

`Entrysubtypes` of `@video`:

`default`   Leave `entrysubtype` blank for the standard book-like formatting.

`"online"`  For online multimedia files or other cases where the book-like location-publisher-year form might be inappropriate. This subtype has the additional fields, `organization`, `usera`, and `userd`.

Required fields:  `author`, `title`, `date`

Optional fields:  `subtitle`, `titleaddon`, `note`, `type`, `authortype`, `nameaddon`, `booktitle`, `booksubtitle`, `booktitleaddon`, `organization`, `howpublished`, `publisher`, `institution`, `year`, `organization`, `usera`, `userd`, `pubstate`, `userd`, `eprint`, `doi`, `url`, `urldate`, `addendum`

Usage notes: There are no dedicated fields for the names and roles of performers, directors, producers, etc. Write these out in the `note` or `titleaddon` fields. The `howpublished` field can be used for movie distributors, and `publisher` for production companies.

customa  Custom type A (*a* for *A*rchive.) For archives or other unpublished collections of source material. (Use entrytype `@customd` for individual sources in the collection.)

Required fields:  `author`, `nameaddon`, `title`

Optional fields:  `subtitle`, `titleaddon`, `type`, `note`, `organization`, `institution`, `location`, `library`, `url`, `urldate`, `doi`, `eprint`, `eprinttype`, `addendum`

Usage notes: `Historian` assumes that most archival collections will be named after a person or institution to whom the archived material belonged and can be alphabetized by this name in the bibliography. In such cases, enter the name of the person or institution in the `author` field and "papers," "archive," or other descriptive information in `nameaddon`. If this `author`–`nameaddon` scheme is inapplicable, enter the name of the collection in the `title` field instead, and leave `author` blank. More information about the collection can be added after the `title` in the `note` field.

The `type` may be used to specify the nature of the collection, e. g.,, "microfilm" or "online database." `Organization` and `institution`, and `library` identify who maintains the archive, and `location` tells where the archive is maintained. `usera` is for any call number or other identifier needed for finding the collection within the library/institution/organization.

Use of the `biblatex shorthands` field and feature is highly recommended for use with `customa` entries, so that all the institutional and location data do not have to be repeated for every item from the collection. It may also be desirable to have all the collections listed at the end in a list of shorthands, before the bibliography.

customd  Custom type D (*d* for *d*ocument.) For individual documents, found in archives, online databases, or even published collections, that are needed in the footnotes only, not in the bibliography. Use the `xref` feature of `biblatex` to link the `@customd` entry to an entry of type `@customa` (for archives), `@collection` (for published collections), or `@online` (for online databases). (Note that such cross-referencing will make additional compiler runs through `bibex` and LaTeX necessary.

`Historian` adds the `@customd` entry keys to the category "noteonly" so that they will be omitted from the bibliography when it is printed with the command `\printbibliography[notcategory=noteonly]`.

`Entrysubtype`s of `@customd`:

default    Leave `entrysubtype` blank for most sorts of documents.

"book"    For any documents that might be sufficiently book-like to require italicized titles.

"to," "from," or "none"  Should the need arise, these subtypes will function as in `@inbook` to change the preposition that comes before the cross-reference.

Required fields:  `author`, `title`, `xref`

Optional fields: `subtitle, titleaddon, booktitle, booksubtitle, booktitleaddon, namec, date, year, pubstat, note, venue, type, series, volume, pages, library, authortype, nameaddon, organization, institution, howpublished, volume, pages, userd, eprint, doi, url, urldate, addendum`

Usage notes: Prefer `@letter` for two-way communications requiring a `namec` field for the recipient. (But `namec` is available here, too, for communications that might not fit the conventions of `@letter`.)

Unlike letters, `@customd` documents will usually have a `title`. If the document does not bear a title, use `titleaddon` for some kind of verbal description to help identify it.

Use `date` for the date on the document, if there is any. If dates are uncertain and brackets, question marks or other non-numeric data must be entered, use the `year` or `pubstate`. The `note` field is printed right before the date and can also be used to qualify the dating.

`Type` is the type of document, e. g., "manuscript," "transcript," or "notebook." It can be left blank if the type is obvious from the title or other information.

`Volume` and `pages` are for locating the item within a cross-referenced `@collection`. `Userd` is for box- and folder numbers, or other information needed to locate the document in a cross-referenced archive (entrytype `@customa`). `Url`, `urldate` and other online locators from the individual documents will be distinguished from the same fields in the cross-referenced `@collection`s or `@customa`s.

If no x-reference is made, `historian` looks for archive data in the `@customd` entry itself, but this is not the intended use of the `@customd` type, and might not give satisfactory results.

# 16 Turabian's Notes-Bibliography Style: The Basic Form (Subsection numbering follows Turabian, 7th ed.)

## 16.1 Basic Patterns

### 16.1.1 Order of Elements

See detailed examples in the next section, or consult the Turabian manual.

### 16.1.2 Punctuation

In footnotes, commas between units and publication data in parentheses. In bibliography, periods between most units and no parentheses.

### 16.1.3 Capitalization

All English-language titles should be entered with headline-style capitalization. `Historian` prints them as entered.

If you expect to use the same database entries in other documents that require sentence-style capitalization, enter everything headline style, because it is easier to convert from headline- to sentence style than vice versa. `Biblatex` provides the

`\MakeSentenceCase*` macro for this purpose. Put curly brackets around proper nouns to protect them from conversion by this macro.

### 16.1.4 Typography of Titles

See detailed examples in the next section, or consult the Turabian manual.

### 16.1.5 Numbers

See detailed examples in the next section, or consult the Turabian manual.

### 16.1.6 Abbreviations

Turabian requires abbreviations, such as "ed." or "vol." in the footnotes, but in the bibliography many of these words have to be written out in full. The system of bibliography strings (`\bibstring`s) in `biblatex` makes this difficult to implement, because it switches abbreviations on or off for the entire file, without distinguishing between footnote- and bibliography environments. `Historian` therefore copies all of the standard `\bibstring`s into its own localization file `historian.lbx`, and redefines them to make them to make that distinction. Some additional strings and keys are defined in the `bbx` file. All are associated with the "american" language option of `babel`.

### 16.1.7 Indentation

See detailed examples in the next section, or consult the Turabian manual.

## 16.2 Bibliographies

### 16.2.1 Types of Bibliographies

See Turabian.

### 16.2.2 Arrangement of Entries

Turabian allows considerable flexibility in the categorization and sorting of bibliographies. Only a few options are discussed and illustrated here, since most of them are not handled directly by `historian`, but rather by the `\printbibliography` command of `biblatex`. See the Turabian manual and the `biblatex` documentation for more information.

**Alphabetical by author**   The standard way of sorting the bibliography under Turabian rules is first by author/editor, then title. The `biblatex` option `sorting=nty`, in the document preamble, implements this.

When the same author/editor name appears in successive bibliography entries, `historian` replaces all but the first with a long dash, as prescribed by Turabian version 7. This is implemented through the use of a `biblatex` bibstring, defined as follows:

```
\DefineBibliographyStrings{american}{namedash={---------}}
```

The name dash can be changed in the document preamble, using the same command. To switch, e.g., from the dash to an underline (as in version 6 of the Turabian manual) enter:

`\DefineBibliographyStrings{american}{namedash={\underline{\qquad}}}`

or make the equivalent change in `historian.lbx`.

### 16.2.3 Sources That May Be Omitted

Not everything mentioned in the footnotes needs to be included in the bibliography. Turabian allows exceptions for: newspaper articles, classics, individual documents in archives, and many others.

Accordingly, `historian`'s entrytypes `@letter` and `@customd` (for archival documents) as well as the `newspaper` subtype of `@article` and the `classic` and `canon` subtypes of `@book` and others are automatically placed in a special bibliography category, called "noteonly." The following form of the `\printbibliography` command omits them from the bibliography:

`\printbibliography[notcategory=noteonly]`

If you need some or all such references in the bibliography, other systems of categorizing and filtering bibliography entries can easily be devised and implemented. See the `biblatex` documentation.

Individual references of other types can be added to the "noteonly" category manually, in the body of the document, with the command,

`\addtocategory{noteonly}{<cite key>}`

Individual references can also be omitted from the bibliography without the use of categories, by setting the `biblatex` option `skipbib` in the `options` field.

## 16.3 Notes

### 16.3.1 Footnotes vs. Endnotes

Turabian does not prefer one system over the other, and in any case, the choice lies outside the purview of `historian`. The following LaTeXcommands change footnotes to endnotes. In the preamble:

`\usepackage{endnotes}`
`\let\footnote=\endnote`

And at the end of the document, where the endnotes are to be printed:

`\theendnotes`

The the `notetype` option of `biblatex` can also convert footnotes to endnotes. See the `biblatx` documentation for details.

### 16.3.2 Referencing Notes in Text

In the main text, the standard LaTeX footnote marks (superscripted numerals) conform to Turabian requirements. Other rules in this subsection of the Turabian manual govern the placement of the cite commands in the text and must be implemented manually.

### 16.3.3 Numbering Notes

Standard LaTeX note numbering conforms to Turabian rules and is not modified by `historian`.

### 16.3.4 Formatting Notes

Standard LaTeX formatting indents the footnotes as required by Turabian, but prints the footnote numbers as superscripts, which is allowed, but not preferred. The following commands, in the preamble to this document, change them to to on-baseline numbers in the footnotes, but leave the footnote references in the text as superscripts:

```
\makeatletter
\renewcommand\@makefntext{\hspace*{2em}\@thefnmark. }
\makeatother
```

The default footnoterule and the breaking across pages seem to be in conformity with Turabian and are not modified by `historian`, but a blank line is called for between footnotes. The command `\footnotesep\baselineskip` in the preamble skips the line. Change, if desired, by deleting or modifying this command.

### 16.3.5 Complex Notes

**Citations**   Successive citations in a single note are separated by semicolons; standard `biblatex` cite commands do this already.

**Citations and comments**   If a note includes a substantive comment, the citation goes first, followed by a period and then the comment.

**Putting full-sentence comments in the `postnote` field**   The comment can easily be entered in the `postnote` field of any of the standard cite commands, but the punctuation can be troublesome, because the postnote is normally preceded by a comma, and a period is called for in this case. If there is a page range in addition to the comment, then all is well. One enters the period manually between the pages and the comment, all in the `postnote` argument, e. g.,[8]

```
\autocites[][12-24. The preceding period was entered manually, after the
page range, in the postnote of the autocite command]
{newman2004promethean-ambi}
```

---

8. William R. Newman, *Promethean Ambitions: Alchemy and the Quest to Perfect Nature* (Chicago and London: University of Chicago Press, 2004), 12-24. The preceding period was entered manually, after the page range, in the postnote of the autocite command.

In case there is no page range to enter, use one of the following:

The \footcitedot command, which prints a period before the postnote, instead of a comma:[9]

```
\footcitedot[][The period was generated by the footcitedot command]
{potter2001gender-and-boyl}
```

Or the \footcitenodot command, which generates no punctuation at all before the postnote (and no space, either):[10]

```
\footcitenodot[][. The period was entered manually in the postnote
of the footcitenodot command]{newman2004promethean-ambi}
```

Or the standard biblatex \cite command, within an ordinary LATEXfootnote, as follows.[11]

```
\footnote{\cite{potter2001gender-and-boyl}. The period was
entered manually after a cite command in an ordinary footnote.}
```

**Quotations within footnotes**  Simply put the quotation in the prenote field of your autocite command. Enter quotation marks manually.[12]

## 16.4  Short Forms for Notes

Turabian allows for a variety of short forms for repeated citations.

### 16.4.1  Shortened Notes

Turabian allows for author-only and title-only forms, as well as the mixed form used by the verbose-inote style of biblatex, in which the title is added only if necessary to avoid ambiguity. Historian adapts the system from verbose-inote, but adds some special short forms for entrytypes that are not always identifiable by author and title (e. g., letters, archival documents, government documents, and certain non-print sources).

Historian also follows verbose-inote in generating cross-references to the note number of the first citation. (Note that such crossreferences require an additional run through your LATEX compiler.) These cross-references are not actually required by Turabian and can be suppressed, using the package option printnoterefs=false (Also available as an entry-option). See 2.3, above.

---

9. Elizabeth Potter, *Gender and Boyle's Law of Gases* (Bloomington and Indianapolis: Indiana University Press, 2001). The period was generated by the footcitedot command.

10. Newman, see n. 8. The period was entered manually in the postnote of the footcitenodot command.

11. Potter, *Gender and Boyle's Law of Gases*, see n. 9. The period was entered manually after a cite command in an ordinary footnote.

12. "Evolution is a change from a no-howish untalkaboutable all-alikeness to a somehowish and in general talkaboutable not-all-alikeness by continuous sticktogetherations and somethingelseifications," William James, as quoted in Elihu Gerson, "Re: Whence a Spencer Spoof?" Mar. 2, 1996, Darwin-l, message to listserv.

### 16.4.2 Ibid.

Turabian considers op. cit., loc. cit., and idem obsolete, but still allows ibid., which is used here, following the implementation in `verbose-inote`.

### 16.4.3 Parenthetical Notes

Turabian allows sources occasionally to be cited in a special short form, in parentheses, within the main text. For this purpose, use `historian`'s `\parencite` command to generate an inline author-title citation.

For example: `\parencite[see][157]{turabian:2007}` generates a parenthetical reference to the rules about parenthetical references: (see Kate L. Turabian, *Manual for Writers*, 157).

To shorten further, use one of the style-independent short forms provided by `biblatex`, and type in the parentheses manually, e.g.,: the `\citeauthor` command (`\citeauthor[][157]{turabian:2007}`) to generate: (Turabian, 157), or the `\citetitle` command (`\citetitle[][157]{turabian:2007}`) to generate (*Manual for Writers*, 157).

## 17 Examples (Section numbering parallels chapter 17 of the Turabian manual, 7th edition

### 17.1 Books and General Guidelines

#### 17.1.1 Author's Name

See Turabian for guidelines. Examples using the `author` field of entrytype `@book` follow. Other entrytypes handle authors the same way.

**Single Authors**    Single author with full first name.[13] Two initials.[14] One initial.[15]

**Multiple Authors**    Two.[16] Three.[17] More.[18]

---

13. Robert C. Olby, *Origins of Mendelism* (Chicago: University of Chicago Press, 1966).

14. F. S. Leuckart, *Allgemeine Einleitung in die Naturgeschichte* (Stuttgart: E. Schweizerbart, 1832).

15. G. Prescott, *Algae of the Western Great Lakes Area*, with an illustrated key to the genera of the desmids and freshwater diatoms, rev. ed. (Dubuque, IA: Wm. C. Brown, 1962).

16. Eva Jablonka and Marion J. Lamb, *Epigenetic Inheritance and Evolution: The Lamarckian Dimension* (Oxford and New York: Oxford University Press, 1995).

17. Erwin Baur, Eugen Fischer, and Fritz Lenz, *Grundriss der menschlichen Erblichkeitslehre und Rassenhygiene* (Munich: J. F. Lehmann, 1923).

18. W. C. Allee et al., *Principles of Animal Ecology*, 1st ed. (Philadelphia and London: W. B. Saunders, 1949).

**Editor or Translator in Addition to an Author**   Treat author same as above; add editor, translator, etc., in `editor`, `translator` or other appropriate `biblatex` and it will be printed after the title and a bibstring such as "ed." or "trans."

See next subparagraph for examples.

**Subsidiary Authors/Editors**   Foreword authors or other subsidiary authors or editors may be omitted under Turabian rules, unless they are of interest in the context of the main text. If the part of the book by the subsidiary author is the main or only part of interest, consider using entrytype `@inbook` instead of `@book` (or `@incollection` instead of `@collection`). See 17.1.8, below.

Aside from author, editor and translator, the many authorial and editorial roles specifiable in `biblatex` are not required, and Turabian gives little guidance for formatting them. If you use them, however, `Historian` will print them. For the most part, they will be formatted as in the `biblatex` standard styles, but with abbreviated identifying strings in the footnotes and the full-length bibstrings in the bibliography.

**Examples of subsidiary authors and editors**   Translator.[19] Editor and annotator.[20] Translator and commentator (this one also illustrates the use of `note` and `titleaddon`).[21]

**Editor or Translator in place of an author**   Enter editors' names in the `editor` field. `Historian` will add "ed.," or "editor" after the name, as appropriate, and the reference will appear in the bibliography under the editor's name. Example of an edited Book.[22]

Book with a translator, but no author: use the field `translator` and set `biblatex`'s `usetranslator` option to true, either globally, or in the options field of the entry.[23] When the option is turned off, such entries are treated as anonymous, see "Anonymous works," below, in this section.

---

19. Erik Nordenskiöld, *The History of Biology: A Survey*, trans. Leonard Bucknall Eyre (New York: Tudor Publishing, 1936).

20. Charles Darwin, *The Autobiography of Charles Darwin, 1809-1882*, with original omissions restored, ed. and annot. by Nora Barlow (New York and London: W. W. Norton, 1958).

21. Charles Darwin, *Über die Entstehung der Arten im Thier- und Pflanzen-Reich durch natürliche Züchtung: Oder Erhaltung der vervollkommneten Rassen im Kampfe um's Daseyn*, nach der zweiten Auflage mit einer geschichtlichen Vorrede und anderen Zusätzen des Verfassers, trans., with an afterw., by Heinrich Georg Bronn, from the 2nd English ed. (Stuttgart: E. Schweizerbart, 1860).

22. Giora Hon, Jutta Schickore, and Friedrich Steinle, eds., *Going Amiss in Experimental Research*, Boston Studies in the Philosophy of Science 267 (Dordrecht: Springer-Verlag, 2009).

23. Theordore Silverstein, trans., *Sir Gawain and the Green Knight* (Chicago: University of Chicago Press, 1974).

(Testing the bibliography dash and punctuation when there are multiple works by the same translator.[24])

### Additional Authorial Situations

**Author's name in title**   If the author's name is redundant, it may be omitted in the footnote, but do not omit it from the database entry, because it is still needed in the bibliography. Enter the name in `author` as usual, but add "redundant" as the `authortype`.[25] `Historian` will then omit the author's name in the footnote. The same function is available in all the other entrytypes as well.[26]

**Organization as author**   Enter organization names and personal names alike in the `author` field.[27] Organizations and corporate authors may have to entered in curly brackets, to prevent them from being broken up inappropriately into first and last names. (If the organization is credited both as author and publisher, it should entered in both fields and allowed to appear twice in the reference.)

**Pseudonym**   If it is widely used, simply enter the pseudonym as the author's name. Otherwise, enter "[pseud.]" or other clarification in `nameaddon`.[28] (The square brackets have to be entered manually.)

**Anonymous works**   If the author's name does not appear on the publication, but is known with certainty, enter it in `author` and add "anonymous" as the `authortype`. This instructs `historian` to put brackets around the author's name.[29] (It is better not to insert the brackets manually, because that would affect the sorting of the bibliography.)

If authorship is only surmised, enter "anonymous?" (with the question mark) as the `authortype`. `Historian` will then add a question mark inside the brackets.[30]

---

24. Theordore Silverstein, trans., *Sir Gawain and the Red Knight* (Chicago: University of Chicago Press, 1974).

25. *The Autobiography of Charles Darwin, 1809-1882*, with original omissions restored, ed. and annot. by Nora Barlow (New York and London: W. W. Norton, 1958), example of redundant author.

26. *Letters of August Forel*, ed. Hans H. Walser, with a forew. by Manfred Bleuler (Bern and Stuttgart: Hans Huber, 1968).

27. Bayerische Akademie der Wissenschaften, *Allgemeine deutsche Biographie*, 56 vols. (Leipzig: Duncker & Humblot, 1875–1899) (henceforth cited as AdB).

28. Harald Stümpke [pseud.], *Bau und Leben der Rhinogradentia*, with an afterw. by Gerolf Steiner (Stuttgart: Gustav Fischer, 1981).

29. [Robert Chambers], *Vestiges of the Natural History of Creation* (1844).

30. [Gerolf Steiner?], *Bau und Leben der Rhinogradentia* (Stuttgart: Gustav Fischer, 1981).

If the author is altogether unknown, simply leave both `author` and `authortype` blank.[31] The entry will be sorted by title (or by editor or translator, if these are available and the `biblatex` options are set accordingly).

These `authortypes` are available in all entrytypes.[32] (The bibliography entries for these last examples also illustrate the use of the `part` field for parts of a book volume. In the first reference the German prefix "Heft" has been entered manually in `part`. In the others, `part` contains only the number, and `historian` generates the prefix.

**Special Types of Names**   Compound names, names with particles and prefixes, etc.: See Turabian and the `biblatex` documentation for the sorting rules. I have not attempted to test `biblatex`'s rules systematically against Turabian's. Use the `sortname` fields to influence the sort order if you are not satisfied with the standard outcome.

### 17.1.2 Title

For title formatting, see Turabian and the book examples, above.

In case an item has multiple subtitles, enter them all in the one `subtitle` field, and separate them manually with colons.

`Historian` makes no changes to the capitalization. Enter titles and subtitles headline style. Other adjustments prescribed by Turabian, such as changing ampersands to "and," must be done manually.

**Special Elements in Titles**

**Dates**   Set off dates with commas. (Must be done manually.)

**Titles and quotations within titles.**   These need to be placed within quotations marks; do not italicize. This must be done manually, but introduces some complications. Ordinary quotation marks work well enough in most cases. The `\enquote` command of the `csquotes` package has the added advantage of being able to decide when to use single and when double quotation marks. But both of these fail in

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31. *Fifty Years of Darwinism: Modern Aspects of Evolution* (New York: Henry Holt & Co., 1909).

32. Johann Friedrich Meckel [pseud.], "Ueber den Charakter der allmählichen Vervollkommnung der Organisation, oder den Unterschied zwischen den höhern und niedern Bildungen," in *Beyträge zur vergleichenden Anatomie* (Leipzig: Carl Heinrich Reclam, 1811); [Johann Friedrich Meckel?], "Ueber den Charakter der allmählichen Vervollkommnung der Organisation, oder den Unterschied zwischen den höhern und niedern Bildungen," in *Beyträge zur vergleichenden Anatomie* (Leipzig: Carl Heinrich Reclam, 1811); [Johann Friedrich Meckel], "Ueber den Charakter der allmählichen Vervollkommnung der Organisation, oder den Unterschied zwischen den höhern und niedern Bildungen," in *Beyträge zur vergleichenden Anatomie* (Leipzig: Carl Heinrich Reclam, 1811).

the case of titles that end in quotation marks, because there is no mechanism for including following punctuation within the quotes, as American conventions require.

The `\mkbibquote` command supplied by `biblatex` helps here. It looks ahead for the punctuation that comes after the title or subtitle and places it within the quotation marks, if appropriate. In these examples, the title is entered as `\mkbibquote{Protoplasm is soft wax in our hands}`, single quotes are generated, and the following colon is correctly printed outside the quotes, but the following comma inside.[33]

Unfortunately, the use of `\mkbibquote` (or `\enquote`) in `title` may affect the sorting of the bibliography. To ensure correct sorting, enter the title again, but without the quotation command, in the field `sorttitle`.

**Italicized terms.**  Terms that would normally be italicized are to be set in roman when they appear in a title. (Must be done manually, preferably using `biblatex`'s `\mkbibemph` macro for the normally italicized terms.)

**Quotation marks and exclamation points.**  `Historian` suppresses any other punctuation following question marks and exclamation points at the end of a title or subtitle.[34]

**Older titles (18th century or earlier).**  `Historian` prints the titles as entered. See Turabian for guidelines.

**Non-English titles.**  Use the `hyphenation` field for the language of the entry. Assuming the option `babel=hyphen` is set, the `babel` package will apply the hyphenation rules for that language. (Avoid `babel=other`, because it may prevent `historian` from finding its redefined bibstrings, which are in the `american` "language.")

An English translation of a foreign title may be added in the field `usere` (i.e., user-defined field e—*e* for English). Capitalize it (manually) sentence-style. `Historian` puts it in brackets after the title.[35]

If the reference is to a translation of a book in another language, the title and other information from the original edition can also be added. Enter the original title, publisher, location and year in `origtitle`, `origpublisher`, `origlocation`, and `origdate`, respectively. Then enter one of the following options in the `options` field of the entry. **Caution: `historian`** has no way to tell a translation from a reprint edition—see next subsection—unless you set one of these options in `option` field:

---

33. Sander Gliboff, "'Protoplasm is Soft Wax in Our Hands': Paul Kammerer and the Art of Biological Transformation," *Endeavour* 29 (2005): 162–165; Sander Gliboff, "'Protoplasm is Soft Wax in Our Hands,'" *Endeavour* 29 (2005): 162–165.

34. Francis H. C. Crick, *What Mad Pursuit?* Subtitle omitted (New York: Basic Books, 1988); Francis H. C. Crick, *What Mad Pursuit? A Personal View of Scientific Discovery* (New York: Basic Books, 1988).

35. Franz Unger, *Botanische Briefe* [Botanical letters] (Vienna: Carl Gerold & Sohn, 1852).

| | |
|---|---|
| `none` | Enter `reprint=none` to have `historian` simply ignore all of the `orig`-fields. |
| `transfrom` | This option prints the translation data first, then adds the data from the original edition.[36] |
| `transas` | This option reverses the usual order of things and prints the data from the `orig`-fields first, then adds that it was translated as [the regular fields][37] |

### 17.1.3 Edition

**Revised Editions**   For numbered editions after the first, enter just a numeral in the `edition` field. It will be converted to an ordinal and followed by the string "ed."[38] The `edition` field may also be used for text, describing or naming the edition, but then the string "ed." will not be appended automatically. Enter, e. g., "rev. ed." for revised editions.[39] Further information about the edition could go in the `note` field.

**Reprint Editions**   `Historian` offers two ways of formatting reprint data. In either case, use `origlocation`, `origpublisher`, and `origdate` for the publication data of the original edition. Use the `options` field or the package options to indicate the desired formatting:

| | |
|---|---|
| `none` | This is the default option. Enter no option at all or `reprint=none` (either globally in the preamble or on a per-entry basis in the `options` field), and `historian` will simply ignore all of the `orig`-fields.[40] |
| `origfirst` | Enter `reprint=origfirst` (either globally in the preamble or on a per-entry basis in the `options` field) in order to print the original publication data first, then the publication data from the reprint. The example also illustrates the use of the `addendum` field to provide additional information about the reprint edition.[41] |

---

36. Robert Chambers, *Natürliche Geschichte der Schöpfung des Weltalls, der Erde und der auf ihr befindlichen Organismen: Begründet auf die durch die Wissenschaft errungenen Thatsachen*, trans. Carl Vogt (Braunschweig: Friedrich Vieweg & Sohn, 1851).

37. Michel Morange, *A History of Molecular Biology*, trans. Matthew Cobb (Cambridge, MA and London: Harvard University Press, 1998).

38. Robert C. Olby, *Origins of Mendelism*, 2nd ed. (Chicago: University of Chicago Press, 1985).

39. Herbert Butterfield, *The Origins of Modern Science*, rev. ed. (Free Press, 1965).

40. William Coleman, *Biology in the Nineteenth Century: Problems of Form, Function, and Transformation*, Cambridge History of Science Series (Cambridge: Cambridge University Press, 1977).

41. Charles Darwin, *On the Origin of Species by Means of Natural Selection: Or the Preservation of Favored Races in the Struggle for Life* (London: John Murray,

addorig    Alternatively, use `reprint=addorig` to append the original publication information at the end of the citation.[42] Unlike `reprint=origfirst`, this option will also print the `origtitle` if there is one.[43] This option can be set globally in the preamble, or on a per-entry basis in the `options` field.

The option `reprint=doubledate` from `historian-rl` has no effect in `historian`.[44]

### 17.1.4 Volume

#### Specific Volume

**Volume has its own title**   In `@book`s and other book-like entrytypes, `historian` prints the title of the volume (from the `title` field), the volume number (`volume`), then the title of the work as a whole (`maintitle`).[45]

**Volume not individually titled**   In this case, `historian` prints `maintitle` and `volume` (i. e., the volume number).[46]

**Volume has its own distinct author or editor**   Volume with a distinct *author*: enter such a case as an `@incollection` or `@inbook`, but with "volume" as the `entrysubtype`. (Or use entrytype `@bookinbook` without a subtype.) The reference is then assumed to be a complete volume, whose title needs to be italicized. The data for the multivolume work as a whole can then be entered in the same `@incollection` or `@inbook` (or `@bookinbook`) entry,[47] or in a separate `@collection`

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1859; repr., Cambridge, MA and London: Harvard University Press, 1964), facsimile of 1st edition (henceforth cited as OoSfacs).

42. William Coleman, *Biology in the Nineteenth Century: Problems of Form, Function, and Transformation*, Cambridge History of Science Series (Cambridge: Cambridge University Press, 1977).

43. Daniel L. Schacter, *Forgotten Ideas, Neglected Pioneers: Richard Semon and the Story of Memory* (Philadelphia: Psychology Press, 2001).

44. Adrian J. Desmond and James Richard Moore, *Darwin: The Life of a Tormented Evolutionist* (New York and London: W. W. Norton, 1994).

45. Mark Twain, *The Adventures of Huckleberry Finn*, vol. 13 of *The Writings of Mark Twain* (New York: Harper, 1912); Sol Tax, ed., *The Evolution of Man*, vol. 2 of *Evolution after Darwin* (Chicago: University of Chicago Press, 1960).

46. George Sarton, *A History of Science*, vol. 1 (Cambridge, MA: Harvard University Press, 1952).

47. Charles Darwin, *Journal and Remarks, 1832-1836*, vol. 3 of *Narrative of the surveying voyages of His Majesty's ships* Adventure *and* Beagle*, Between the Years 1826 and 1836: Describing their examination of the southern shores of South America, and the* Beagle*'s circumnavigation of the globe*, ed. Robert FitzRoy (London: Henry Colburn, 1839), volume and multivolume set all in one entry.

(or `@book`), linked via the `xref` field (i. e., the entry key of the `@collection`/`@book` goes in the `xref` field of the `@incollection`/`@inbook`.[48]

Volume with a distinct *editor*: This is best done in two entries, an `@incollection` with the `entrysubtype` "volume" linked by `xref` to a `@collection`.[49] It can also be entered all in one `@inollection`, but one needs to use one of the custom editor fields for the editor of the multivolume work as a whole, since `editor` will be occupied by the volume editor. In the example, `editora` is used but the others will also work (as will `nameb`—see next paragraph).[50] One could also use the `editoratype` field to generate a different string to introduce the higher-level editor, instead of using "ed." for both—see the `biblatex` documentation for more on this.)

Three-level example from Turabian.[51] Here we have a selection from an edited volume of a multivolume collection, where the volume has an editor distinct from the general editor of the multivolume work. It is entered as a single `@incollection` entry. The volume editor goes in any of the custom editor fields discussed in the previous paragraph, which are all associated with the `booktitle`. The general editor goes in the custom name field `nameb` (*b* for *b*ig editor), and is associated with the `maintitle`.

The previous example also serves to illustrate the use of the `part` field, for a volume that is subdivided into books or parts. By default, when the field contains nothing but an integer, it is preceded by the abbreviation "bk." for "book." When it contains other types of data, `historian` assumes that some other prefix has been entered manually, and the "bk." is left off. For an example of this, see 17.1.1.

**Multivolume work as a Whole**   Example.[52]

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48. Charles Darwin, *Journal and Remarks, 1832-1836*, vol. 3 of *Narrative of the Surveying Voyages of His Majesty's Ships* Adventure *and* Beagle, *Between the Years 1826 and 1836: Describing Their Examination of the Southern Shores of South America, and the* Beagle*'s Circumnavigation of the Globe*, ed. Robert FitzRoy (London: Henry Colburn, 1839), volume xref'ed to collection.

49. Eduard Strasburger, ed., *Botanischer Teil*, vol. 1 of *Zellen- und Gewebelehre, Morphologie und Entwicklungsgeschichte*, ed. Eduard Strasburger and Oscar Hertwig (Leipzig and Berlin: B. G. Teubner, 1913), volume xref'ed to collection.

50. Eduard Strasburger, ed., *Botanischer Teil*, vol. 1 of *Zellen- und Gewebelehre, Morphologie und Entwicklungsgeschichte*, ed. Eduard Strassburger and Oscar Hertwig (Leipzig and Berlin: B. G. Teubner, 1913), all in one entry.

51. Barbara E. Mundy, "Mesoamerican Cartography," in *Cartography in the Traditional African, American, Arctic, Australian, and East Asian Socieities*, ed. David Woodward and G. Malcolm Lewis, vol. 2, bk. 3 of *The History of Cartography*, ed. J. Brian Harley and David Woodward (Chicago: University of Chicago Press, 1998), 233.

52. John Theodore Merz, *A History of European Thought in the Nineteenth Century*, 4 vols., 4th ed. (Edinburgh and London: William Blackwood & Sons, 1923); George Sarton, *A History of Science*, 2 vols. (Cambridge, MA: Harvard University Press, 1952–1959).

### 17.1.5 Series

Optional, according to Turabian rules. Use the package- or entry-option `printseries` to make `historian` print the `series`[53] and, if there is one, the `number` of the book within the series.[54] The `number` field is not strictly for numeric data and so may be used for other sorts of descriptors. There is no punctuation between `series` and `number`.

Delete the package option to omit `series` and `number` generally, or enter `printseries=false` in the `options` field of individual entries. Several examples of books with series can be seen above.

There is no special provision in `historian` for printing series editors. If the series editor is important to you, use the `note` field for it, which is printed right after `series`.[55]

### 17.1.6 Facts of Publication

**Place of Publication**  Use `location` for the city where the publisher has its main editorial offices. If `location` is undefined, `biblatex` will automatically substitute data from an `address` field, if there is one.

Turabian allows location sometimes to be omitted, so the string "n.p." is not automatically generated when `location` is empty.[56] If an "n.p." is required, enter it manually or enter the key "noplace" to generate the bibstring.[57]

Question mark and brackets may be used to indicate uncertainty about the place of publication. Enter these manually, too.[58]

**Publisher's Name**  Use `publisher`. If this field is empty, `historian` will try `institution`, then `howpublished`—this applies to `@book`, `@collection`, and all the other book- or collection-like entrytypes.

If the publisher is unknown, leave the above fields blank.[59] In the 6th edition, Turabian recommended entering "n.p." (for "no publisher"), which can be done manually or by entering the key, "nopublisher."

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53. Coleman, *Biology in the Nineteenth Century*, see n. 40.

54. Richard Semon, *Zoologische Forschungsreisen in Australien und dem malayischen Archipel: Mit Unterstützung des Herrn Dr. Paul von Ritter, ausgeführt in den Jahren 1891-1893*, 6 vols., Denkschriften der medizinisch-naturwissenschaftlichen Gesellschaft zu Jena 4–8 (Jena: Gustav Fischer, 1893–1913).

55. Here the `note` field is used for the series editor: Elizabeth Potter, *Gender and Boyle's Law*, Race, Gender, and Science Series, Anne Fausto-Sterling, series editor (Bloomington and Indianapolis: Indiana University Press, 2001).

56. Butterfield, see n. 39.

57. Janet Browne, *Charles Darwin: The Power of Place* (n.p.: Alfred A. Knopf, 2003), "noplace" in location.

58. Janet Browne, *Charles Darwin: The Power of Place* ([Downe?], 2003), location uncertain, publisher empty.

59. Janet Browne, *Charles Darwin: The Power of Place* (New York, 2003), publisher empty.

If both the location and the publisher are unknown, then leave them blank and just use the date.[60] Or, to follow the recommendation of Turabian's 6th edition, enter a single "n. p." (or one of the keys for the bibstring) in one of the two fields.

**Date of Publication**   The `date` field is preferred, but `year` also works, and indeed is better when non-numerical data has to be entered, such as an approximate year in brackets or with a question mark.[61]

If neither a `date` nor a `year` is entered, `historian` will substitute `pubstate` for the year of publication. If `pubstate` is empty, too, "n.d." (i.e., no date) will automatically be printed out in lieu of a date.[62] Exceptions are made for `@customa` and `@online`, which are allowed to be undated.

For works that are not yet published, but already under contract and titled, enter "forthcoming" in `pubstate`.[63]

Note also that `pubstate` may contain either a text or a key to a bibstring, such as "inpress"[64] See the `biblatex` documentation for more about this field and the use of keys and bibstrings. `Historian` defines "forthcoming" as a bibstring, too.

For works in earlier stages of production, i.e., without a definite publisher or journal, it may be better to use the entrytype `@unpublished` instead of `@book` or `@article`.[65]

### 17.1.7 Page Numbers and Other Locating Information

**Page, Chapter, and Division Numbers**   Unlike the standard `biblatex` styles, `historian` does not print out the `pages` and `chapter` fields of `@book` entries. Use `@inbook` or `@incollection` for book sections, or (for footnotes only, not the bibliography) enter page ranges (or chapters, parts, or other divisions of the book) manually in the `postnote` argument of the citation command.[66] (Abbreviations such as "p." or "pp." are not used for page numbers under Turabian.)

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60. Janet Browne, *Charles Darwin: The Power of Noplace* (2003), location and publisher both left blank.

61. Wilhelm Bölsche, *Ernst Haeckel: Ein Lebensbild*, 2nd ed. (Berlin and Leipzig: Hermann Seemann, [ca. 1905]).

62. Paul Kammerer, *Das biologische Zeitalter: Fortschritte der organischen Technik* (Vienna: Verein Freie Schule, n.d.).

63. Sander Gliboff, *H. G. Bronn, Ernst Haeckel, and the Origins of German Darwinism: A Study in Translation and Transformation*, Transformations: Studies in the History of Science and Technology (Cambridge, MA: MIT Press, forthcoming).

64. Sander Gliboff, *The Origins of German Darwinism* (Cambridge, MA: M.I.T. Press, in press), pubstate instead of year.

65. Sander Gliboff, "The Origins of German Darwinism" (manuscript, unpublished).

66. William Bateson, *Materials For the Study of Variation* (London: Macmillan, 1894), 1–22.

**Special Types of Locators**   See `biblatex` documentation for implementation of specialized "pagination" options, for books that have, e. g., numbered verses instead of pages.

**URLs, Permanent Source Identifiers, Access Dates, and Descriptive Locators** See Turabian for general discussion.

**Printed books that are also available online**   Enter full publication data, so that readers can find the book even if the url changes. Under the option `url=true` (see 2.3, above), the url and the access dates (from date field `urldate`) will be printed. Similarly, `doi` and `eprint` will be printed if the `doi` and `eprint` are set accordingly.[67]

`Historian` retains the standard `biblatex` strings for introducing the various electronic identifiers (e. g., "URL:" or "DOI:"), even though these are not prescribed by Turabian. There are now more kinds of electronic identifiers in common use than when the Turabian manual was last updated, so it seems reasonable to introduce some such system.

(`Biblatex` does not declare the "URL:" and "DOI:" prefixes as easily modifiable `bibstring`s, but generates them with `\DeclareFieldFormat` commands in the `biblatex.def` file. To modify or remove them, you will have to copy those commands to your preamble and edit them there.)

**Books published online**   Turabian does not make a strong distinction between these and traditional printed books. Use entrytype `@book` and follow the guidelines for printed books as far as possible. Use the `publisher` field for any entity or person who played a role in producing the book that might be comparable to that of a traditional publisher, or else give a brief verbal explanation of how the book was produced or disseminated. If the publisher or publisher-like entity maintains an office or headquarters, enter the city in the `location` field. And, of course, be sure to include the url. Turabian also calls for access dates, which go in `urldate`.

In order that the online locating information be printed, make sure the `url` (or `doi` or `eprint`) option is set, or use the entrysubtype "online," for which the online locators are always printed, even if the options are set to false.[68] See also 17.1.10, below.

### 17.1.8 Chapters and Other Titled Parts of a Book

Normally, a book with unified authorship should be cited as a whole in a bibliography, with page ranges identified in the `postnote` arguments of the footnotes. However the entrytype `@inbook` is available for parts of books that have their own

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67. William Paley, *Natural Theology: Or, Evidences of the Existence and Attributes of the Deity*, 12th ed. (London: J. Faulder, 1809), URL: darwin-online.org.uk/content/frameset?itemID=A142&viewtype=text&pageseq=1 (accessed 12/02/2006).

68. Jean-Baptiste de Lamarck, *Zoological Philosophy*, trans. Ian Johnston, vol. 1 (Nanaimo, British Columbia: posted on the Web, by the translator, 1999), URL: http://records.viu.ca/~johnstoi/lamarck/tofc.htm (accessed 01/18/2009).

titles. Entrytype `@incollection` is for individual authors' contributions to edited volumes. These two entrytypes are treated similarly by `historian`.

### Parts of Single-Author Books

**Titled book sections**   Part title goes in `title`, book- or volume title in `booktitle`, titles of multivolume sets in `maintitle`. The page range of the entire section is printed after the `booktitle` in the bibliography, but not in the footnotes. These first examples are `@inbook`s in which the main author is the same as the part author.[69] Use the `postnote` argument of your cite command to refer to specific pages at the end of the footnote, if necessary.

Turabian give no guidance on the use of chapter numbers, but if a number is entered in `chapter`, `historian` will print it before the "in."

**Introductions, prefaces, etc., without special titles**   For, e.g., introductions "to" a book or edited volume, use `entrysubtype` "to" of `@incollection` or `@inbook`. Enter "introduction" or "foreword" or other generic or descriptive title, without capitalizing it, in `titleaddon`. Enter the author of the section in `author`, the author of the book as a whole (if different from the section author) in `bookauthor`.[70]

An entrysubtype "from" is also available, which is formatted in much the same way, only with the preposition "from" instead of "to" or "in."[71]

These subtypes are intended for untitled book sections, but if a `title` is entered, it will be printed in quotation marks as usual, preceding the generic title from the `titleaddon` field.[72]

### Parts of Edited Books

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69. Susan Faye Cannon, "Humboldtian Science," in *Science in Culture: The Early Victorian Period* (New York: Science History Publications, 1978); Richard Semon, "Die äussere Entwicklung des Ceratodus Forsteri," in *Zoologische Forschungsreisen in Australien und dem malayischen Archipel: Mit Unterstützung des Herrn Dr. Paul von Ritter, ausgeführt in den Jahren 1891-1893*, Denkschriften der medizinisch-naturwissenschaftlichen Gesellschaft zu Jena 4 (Jena: Gustav Fischer, 1893).

70. Ulrich Charpa, introduction to *Wissenschaftsphilosophische Schriften*, by Matthias Schleiden, ed. Ulrich Charpa (Cologne: Jürgen Dinter, 1989).

71. Heinrich Georg Bronn, translator's concluding remarks from *Über die Entstehung der Arten*, by Charles Darwin, trans. Heinrich Georg Bronn (Stuttgart: E. Schweizerbart, 1863).

72. Heinrich Georg Bronn, "Schlusswort des Übersetzers," translator's concluding remarks from *Über die Entstehung der Arten*, by Charles Darwin, trans. Heinrich Georg Bronn (Stuttgart: E. Schweizerbart, 1863).

**Titled**  For titled sections of an edited collection with multiple authors, use entry-type `@incollection`, which is formatted similarly to `@inbook`, except that the work as a whole has an `editor` instead of a `bookauthor`.[73]

**Untitled introductions, etc.**  Same entrysubtypes and guidelines as above in `@inbook`, except with `editor` in place of `bookauthor`.

**Citing multiple contributions to the same book or edited collection**  When citing multiple sections of the same book or collection, there are two options, under Turabian rules. Either treat each section as a separate bibliographic entity and repeat the book/collection information in full for each; or give the book information in full only for the first section cited, then use a short form of the for the book/collection information in subsequent footnotes.

These options are implemented as follows in `historian`:

1. Enter all the section- and book data in every `@inbook` or `@incollection` entry. `Historian` will then treat each as a distinct source and will repeat the `@book`/`@collection` data.

   In these examples, the `@incollection` entries are both filled out with the complete collection data.[74]

2. Enter the section data in separate `@inbook` or `@incollection` entries, but the book/collection data in a single `@book` or `@collection`, and link them by means of the `xref` field. (The entry key of the `@book`/`@collection` goes in the `xref` field of each of its `@inbook`s/`@incollection`s. `Historian` follows the link and gets the data that it needs.)

   If the `@book`/`@collection` has already been cited, its shorthand or other short form is printed in the footnote.

   Bibliography entries are not shortened, however, unless the `shortincoll` is set (see 2.3, above). Under this option, short forms similar to those used in repeated footnotes are used, usually giving the `author` (or `shortauthor`, if available) and, if there are several entries for the same author, then also `title` (or `shorttitle`, if available). `shorthand`s are not used, under the assumption

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73. William M. Montgomery, "Germany," in *The Comparative Reception of Darwinism*, ed. Thomas F. Glick, Dan Danciger Publication Series (Austin and London: University of Texas Press, 1974), 74-5.

74. Marc J. Ratcliff, "Duchesne's Strawberries: Between Growers' Practices and Academic Knowledge," in *Heredity Produced: At the Crossroads of Biology, Politics, and Culture, 1500-1870*, ed. Staffan Müller-Wille and Hans-Jörg Rheinberger, Transformations: Studies in the History of Science and Technology (Cambridge, MA and London: MIT Press, 2007), written out in incollection;  Silvia De Renzi, "Resemblance, Paternity, and Imagination in Early Modern Courts," in *Heredity Produced: At the Crossroads of Biology, Politics, and Culture, 1500-1870*, ed. Staffan Müller-Wille and Hans-Jörg Rheinberger, Transformations: Studies in the History of Science and Technology (Cambridge, MA and London: MIT Press, 2007).

that the reader will look for the collection data as it is entered alphabetically in the bibliography, not in the separate list of shorthands.

In this example, An `@incollection` is linked via `xref` to a `@collection`.[75] Here are repeated citations linked to the same `@collection`, with the entry option `shortincoll` set to true,[76] and without.[77]

This method has the side-effect of pulling the `@inbook` or `@incollection` into the bibliography, even if it is not cited explicitly. The `biblatex` option `mincrossrefs=1` sees to it that cross-referenced entries are put into the bibliography the first time they are cited—which is the desired behavior for archival documents of types `@letter` and `@customd`.

3. (Workable, but not recommended) Same data entry procedure as above, but using the `crossref` field instead of `xref`. In such cases, `historian` relies on your BibTeX database to follow the links and supply the section- and book/collection data together. From the point of view of `historian`, using `crossref` is the same as entering all the data in a single `@inbook` or `@incollection` record, as in the first option.

Reasons for avoiding the BibTeX `crossref` function are discussed in the `biblatex` documentation. (Specific problems I have encountered occur because `@collection` fields are "copied down" indiscriminately to the `@incollection` level, allowing, e.g., even the collection's `shorthand` to become associated with the `@incollection`.)

Still, this option may still be preferable to re-organizing a BibTeX database that already relies on `crossref`. In this example, an `@incollection` entry is linked by its `crossref` field to a `@collection`.[78]

4. If both `xref` and `crossref` are used, `historian` follows the `xref` link and ignores the data supplied by the `crossref` function.

`Historian` does not check for consistent usage of these options. The user should avoid mixing them in a single document.

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75. Philip K. Wilson, "Erasmus Darwin and the 'Noble' Disease (Gout): Conceptualizing Heredity and Disease in Enlightenment England," in *Heredity Produced: At the Crossroads of Biology, Politics, and Culture, 1500-1870*, ed. Staffan Müller-Wille and Hans-Jörg Rheinberger, Transformations: Studies in the History of Science and Technology (Cambridge, MA and London: MIT Press, 2007).

76. Marc J. Ratcliff, "Duchesne's Strawberries: Between Growers' Practices and Academic Knowledge," in Müller-Wille and Rheinberger, using xref and shortcoll.

77. David Warren Sabean, "From Clan to Kindred: Kinship and the Circulation of Property in Premodern and Modern Europe," in Müller-Wille and Rheinberger.

78. David Warren Sabean, "From Clan to Kindred: Kinship and the Circulation of Property in Premodern and Modern Europe," in *Heredity Produced: At the Crossroads of Biology, Politics, and Culture, 1500-1870*, ed. Staffan Müller-Wille and Hans-Jörg Rheinberger, Transformations: Studies in the History of Science and Technology (Cambridge, MA and London: MIT Press, 2007), using crossref.

**Works in Anthologies**  In most cases, anthologies are no different from the other sorts of edited collections, discussed above. Anthologized excerpts from book-length poems or prose works are an exception, however, because their titles have to be italicized. In such cases, leave `title` blank, enter "excerpt" or "selection" or other appropriate text in `titleaddon`, and the poem or book title in `booktitle`. The anthology title then has to go in `maintitle`, and the anthology editor in `nameb` (because `editor` refers to the editor of the `booktitle`, not the `maintitle`. Use the `entrysubtype` "from" to change the preposition before the `booktitle` (or `entrysubtype` "none" to get rid of it entirely, depending on the phrasing of the `titleaddon`).[79]

Sometimes the year of original publication of the anthologized article, poem, or prose work is called for. Use custom field `usera` (`a` for "*a*rticle") for this, and it will be printed after the `title`. This example also illustrates the use of `namebtype` to change the role of the contributor named in `nameb`.[80]

In rare cases, a separate year will be needed to go with the `booktitle` of an anthology. Use `userb` (`b` for *b*ook) for this.[81]

### 17.1.9 Letters and Other Communications in Published Collections

Only the collection goes in the bibliography. The individual letters are identified only in the footnotes. Two methods are available:

1. Use entrytype `@collection` for the published collection as a whole, and identify the letter manually in the `prenote` and `postnote` arguments of the citation command, as follows:[82] `\autocites[Charles Darwin to T. H. Huxley, 2 February, 1860, in][2: 64--5]{1083}`

2. Or, again use `@collection` for the published collection as a whole, but also use the entrytype `@letter` for the letter and link it to the `@collection` using `biblatex`'s `xref` function. The entry key of the `@collection` goes in the `xref`

79. Alexander Pope, excerpt from *An Essay on Criticism*, in *The Oxford Book of Satirical Verse*, ed. Geoffrey Grigson (Oxford: Oxford University Press, 1980).

80. Johann Christian Reil, "Von der Lebenskraft" (1796), in *Gesammelte kleine physiologische Schriften* (Vienna: Aloys Doll, 1811).

81. Alexander Pope, excerpt from *An Essay on Criticism* (1711), in *The Oxford Book of Satirical Verse*, chosen by Geoffrey Grigson (Oxford: Oxford University Press, 1980).

82. Charles Darwin to T. H. Huxley, 2 February, 1860, in Francis Darwin, ed., *The Life and Letters of Charles Darwin: Including an Autobiographical Chapter*, 2 vols. (New York: D. Appleton & Co., 1898) (henceforth cited as DarLifeLet), 2: 64–5.

field of the `@letter`.[83] It is recommended that the `@collection` also be given a `shorthand`, by which to identify it in subsequent citations.[84]

(The `crossref` function of BibTeX can also be used, but is not recommended, because it may be error-prone.)

The custom name field `namec` (`c` for *c*orrespondent) is for the recipient of the communication. Use the `volume` and `page` fields of `@letter` to locate the letter within the collection. If letters are to be identified by some internal numbering or labeling scheme instead of (or in addition to) volume and page numbers, try `biblatex`'s `pagination` function, or use the `addendum` field.

The field `type` of `@letter` may be used to indicate whether the communication is a postcard, telegram, e-mail, memorandum, or other sort of document than a letter.

Use `venue` for the place from which the letter was sent.

The fields `note` and `addendum` allow for further, nonstandard information to be included in the citation. `Note` is printed between the `venue` and the `date`, and `addendum` after the collection data.

If dates are uncertain and require brackets, question marks, or other non-numeric data that the `date` field cannot accommodate, use `year` or `pubstate` instead. The `note` field precedes the date and can also be used for information about the dating.

In repeated citations of the same letter, `historian` adds the recipient's name (from `namec`) and the date (from `date`, `year`, or `pubstate`, but not from `note`) to the short form.[85]

See also subsection 17.6.4, below, on letters and other items in manuscript collections.

### 17.1.10 Online and Other Electronic Books

**Online books with URLs** See 17.1.7, above. Follow the guidelines for printed books as far as possible, and either use the entrysubtype "online" or set the `url`, `doi`, `eprint` option.

If page numbers are not available, Turabian recommends that the location within the electronic source to be described (in the footnotes) with a phrase, using "under," e.g., "under subheading A." This can be done in the `postnote` argument of the citation. This is the preferable solution, even though it is not quite in conformity with Turabian guidelines, which place the phrase before the url instead of after it.

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83. Ernst Haeckel to Anna Sethe, Naples, Apr. 18, 1859, in *Italienfahrt: Briefe an die Braut, 1859/1860*, with an intro. by Heinrich Schmidt (Leipzig: K. F. Koehler, 1921) (henceforth cited as HaeckItal), 31–2; Charles Darwin to Heinrich Georg Bronn, Downe, Feb. 14, 1860, in *The Correspondence of Charles Darwin*, ed. Frederick Burkhardt and Sydney Smith (Cambridge and New York: Cambridge University Press, 1985–) (henceforth cited as Darwin Correspondence), 8: 82–3.

84. Ernst Haeckel to Anna Sethe, Naples, Apr. 9, 1859, in HaeckItal, 30–31.

85. Haeckel to Sethe, Apr. 18, 1859, see n. 83.

It does, however, maintain consistency with the placement of other kinds of within-the-source locating information, like page references, that one would normally not store in the database entry, but specify when making the citation.

(For sticklers, `historian` provides the special cite command `\footciteurllast`, which will print `postnote` before the online locators, as Turabian prescribes.[86] This command should be used with caution, however, because it violates `biblatex` conventions, and may be error prone. Do not use it with multiple entry keys in the same command. Try multiple `\citeurllast` commands within a LaTeX footnote instead.)

**Other Electronic Formats**   Use the `addendum` field to add information at the end of the reference about other electronic formats in which the book might be available, e.g., "e-book," or "CD-ROM." (The same can be done for non-electronic formats, such as microfilms.)[87]

## 17.2  Journal Articles

### 17.2.1  Author's Name

Same as for `@book`. See 17.1.1, above.

### 17.2.2  Article Title

Title in quotation marks, comma inside quotes.[88] Title and subtitle separated by colon[89] Titles ending in question marks and exclamation points.[90] Optional English translation of foreign title goes in `usere` and is printed in brackets, without quotation marks.[91] Other rules must be applied manually.

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86. "Linus Pauling and the Race for DNA: A Documentary History," Oregon State University Libraries, Special Collections, under "narrative," URL: http://osulibrary.orst.edu/specialcollections/dna (accessed 06/27/2010).

87. Ernst Haeckel, *The Evolution of Man: A Popular Scientific Study*, 2 vols., translated from the 5th (enlarged) ed. (London: Watts, 1912), downloaded from Project Gutenberg, file evlmn10h.txt.

88. "Effects of Sexual Activity on Beard Growth in Man," *Nature* 226 (1970): 869–870.

89. Scott F. Gilbert and Ziony Zevit, "Congenital Human Baculum Deficiency: The Generative Bone of Genesis 2: 21–23," *American Journal of Medical Genetics* 101 (2001): 284–285.

90. Robert C. Olby, "Mendel no Mendelian?" *History of Science* 17 (1979): 53–72; Jane Maienschein, Ronald Rainger, and Keith R. Benson, "Introduction: Were American morphologists in revolt?" *Journal of the History of Biology* 14, no. 1 (1981): 83–87.

91. Veronika Hofer, "Konrad Lorenz als Schüler von Karl Bühler: Diskussion der neu entdeckten Quellen zu den persönlichen und inhaltlichen Positionen zwischen Karl Bühler, Konrad Lorenz und Egon Brunswick" [Konrad Lorenz as a student of

### 17.2.3 Journal Title

Like book titles. Don't use abbreviations, except to drop an initial "the."

### 17.2.4 Issue Information

Use any and all identifiers that are available: volume, issue number, date.

**Volume and Issue Numbers**   Use `volume` for the volume number and `number` for the issue number. `Historian` inserts "no." (or "nos." if a range of numbers is given) before issue number.[92] Case of a date instead of an issue number.[93] Case of issue number without a volume.[94]

**Date of publication**   Season, using the `issue` field.[95] Month, using either the `month` field or the partially filled out `date` field.[96] Year only.[97] Exact date.[98]

Forthcoming articles: enter "forthcoming" or other appropriate description in `pubstate` (or `year`, which, unlike `date`, can accommodate text).[99] But note that `pubstate` will only be printed if neither `year` nor `date` has been used.

### 17.2.5 Page Numbers and Other Locating Information

**Citing the full article**   See examples above.

**Citing specific pages**   Turabian prefers the full page range (from the `pages` field) to be omitted when a page or page range is specified in the `postnote` argument. This is equivalent to the behavior of the `verbose` styles of `biblatex`, under the `citepages=`

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Karl Bühler: Discussion of newly uncovered sources], *Zeitgeschichte* 28 (2001): 135–159.

92. M. J. S. Hodge, "Darwin's argument in the Origin," *Philosophy of Science* 59, no. 3 (1992): 461–464.

93. Brad Cook, "IU's First Female Ph.D. Was a Zoologist, Suffragist, Expert on Mendelian Laws," *IU Homepages*: *Faculty and Staff News From the Campuses of Indiana University* (Apr. 2007): 5.

94. Brad Cook, "IU's First Female Ph.D.," *IU Homepages*: *Faculty and Staff News From the Campuses of Indiana University*, no. 13 (2007): 5.

95. John Burdon Sanderson Haldane, "A Defense of Beanbag Genetics," *Perspectives in Biology and Medicine* 7 (Spring 1964): 343–359.

96. Cook, "IU's First Female Ph.D. Was a Zoologist, Suffragist, Expert on Mendelian Laws," see n. 93.

97. Hodge, see n. 92.

98. Brad Cook, "IU's First Female Ph.D. Was a Zoologist, Suffragist, Expert on Mendelian Laws," *IU Homepages*: *Faculty and Staff News From the Campuses of Indiana University* (Apr. 20, 2007): 5.

99. Karin J. Ekholm, "Harvey's and Highmore's Accounts of Chick Generation," *Early Science and Medicine* 13 (forthcoming): 568–614.

omit option, which `historian` implements by default. When `historian` recognizes a page or page-range in the `postnote` of an `@article`, it also prints a colon, instead of the usual comma as the postnote-separator.[100]

In most cases, the usual cite commands will do this adequately, but problems arise when the `postnote` argument contains additional text that makes the page range unrecognizable as such. The full page range of the article from the `pages` field will then be printed, followed by a comma, and the `postnote`. This may sometimes be desired, for example in conjunction with a prefatory text such as "on," or "quotation on," or "see especially."[101]

Unfortunately, there are other cases when the usual cite commands will fail to recognize a page range in the `postnote` argument, and will print the `pages` field inappropriately, for example when there is a page range plus commentary in the `postnote`, or non-numeric locating information such as "ff." or "et passim." In such cases, one must resort to the special cite command `\footcitecolon`, which checks whether anything at all is entered in the `postnote` argument, and if so, omits the full page range of an `@article` entry, and prints a colon before the `postnote` instead of a comma.[102]

In complex cases, where multiple references are cited in the same note, some requiring the colon and some the comma, use appropriate combinations of `\citecolon`, `\citedot`, `\citenodot`, or `\cite`) inside an ordinary LaTeX footnote.[103]

The other options from the `verbose` styles, namely `citepages=permit`, `suppress`, or `separate` (see 2.3, above), are also available in `historian`, but they sshould not be needed under Turabian guidelines, and are not demonstrated here.

### 17.2.6 Special Issues and Supplements

**Articles in special issues**  For articles in special issues or special sections of a journal. Issue- or section title goes in `issuetitle` and `issuesubtitle` and is printed in quotation marks. Enter "special issue" or other information pertaining to the issue in `note`, which functions in `@article` as a kind of prefix to the journal title. If an `@article` has an `issuetitle`, `historian` will assume that any `editor` that is entered is the editor of the issue, rather than the article.

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100. Mark B. Adams, "Last Judgment: The Visionary Biology of J. B. S. Haldane," *Journal of the History of Biology* 33 (2001): 457.

101. Marsha Leigh Richmond, "T. H. Huxley's Criticism of German Cell Theory: An Epigenetic and Physiological Interpretation of Cell Structure," *Journal of the History of Biology* 33 (2000): 247–283, on 250.

102. Raymond A. Dart, "Australopithecus africanus: The Man-Ape of South Africa," *Nature* 115, no. 2884 (1925): 199ff.

103. Pietro Corsi, "Before Darwin: Transformist Concepts in European Natural History," *Journal of the History of Biology* 38 (2005): 68; Pietro Corsi, *The Age of Lamarck: Evolutionary Theories in France, 1790-1830*, trans. Jonathan Mandelbaum (Berkeley and Los Angeles: University of California Press, 1988)

Example of an article in a titled issue, with an issue editor, and "special issue" in the `note` field. (This example also illustrates the formatting of a journal `series`.)[104]

Same example, using `xref` to link the `@article` to a separate `@periodical` entry, containing the issue-information.[105] This can be useful when multiple articles from the same special issue are to be cited. See 17.1.8, above for more about crossreferencing.

The same entrysubtypes as in `@inbook` and `@incollection` are available here for changing the preposition from "in" to "from" or "to," or suppressing it entirely.

**Whole special issues**  To cite a titled issue as a whole, also use `@periodical`. The `title` and `subtitle` fields refer to the title of the special issue, `journaltitle` and `journalsubtitle` to the title of the periodical. `Issuetitle` should not be used. The `note` field is printed before the periodical `title` and may be used for descriptors such as "special issue." Examples of whole issues, with and without an issue editor.[106]

Separately numbered journal supplements: same as above, using `@periodical` for entire supplements and `@article` for articles in the supplement. `Historian` has no special treatment for the `@supperiodical` entrytype and no special field for a supplement number. Depending on the journal's numbering scheme, either combine it manually with the volume number in the `volume` field (with a comma after the volume number), or use the `issue` field. In this example, the string, "79, Suppl." is in `volume`.[107]

### 17.2.7 Articles Published Online

Follow guidelines for printed articles as far as possible, and add urls and other electronic locators in the fields provided. Make sure the `url`, `doi`, and `eprint` options are set accordingly. Turabian calls for access dates with all urls, so use `urldate`, too.[108] If there are no page numbers, use descriptive locators in the `postnote` argument of citations, e. g., "under subheading A."

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104. Gerd Schubring, "The Rise and Decline of the Bonn Natural Sciences Seminar," in "Science in Germany: The Intersection of Institutional and Intellectual Issues," ed. Kathryn M. Olesko, special issue, *Osiris*, 2nd ser., 5 (1989): 57–93.

105. Gerd Schubring, "The Rise and Decline of the Bonn Natural Sciences Seminar," in "Science in Germany: The Intersection of Institutional and Intellectual Issues," ed. Kathryn M. Olesko, special issue, *Osiris*, 2nd ser., 5 (1989): 57–93.

106. Jane Maienschein, Ronald Rainger, and Keith R. Benson, eds., "American Morphology at the Turn of the Century," special section, *Journal of the History of Biology* 14, no. 1 (1981); "Special Issue on Eugenics," *Science in Context* 11, nos. 3/4 (1998).

107. Garland E. Allen, "Genetics, Eugenics and Class Struggle," *Genetics* 79, Suppl. (1975): 29–45.

108. Melinda B. Fagan, "Wallace, Darwin, and the Practice of Natural History," *Journal of the History of Biology* 40 (2007): 601–635, DOI: 10.1007/s10739-007-9126-8, URL: http://dx.doi.org/10.1007/s10739-007-9126-8 (accessed 03/01/2009).

## 17.3 Magazine Articles

Use entrytype `@article` with `entrysubtype` "magazine." Magazine issues are cited by date only, without the parentheses, and with a comma instead of a colon before the page numbers.[109] The page range may be also be omitted entirely.

Regular column or department: capitalize the name of the column or department and enter it in `@titleaddon` instead of (or in addition to) the title of the individual article.[110]

Column or department, without a named author: the magazine or journal takes over the role of author. `Historian` cannot recognize this case automatically, so enter the name of the magazine or journal in the `author` field (in curly brackets, to prevent inappropriate parsing into first and last names) and "journal" in `authortype`. `Historian` will then italicize the author name and suppress the `journaltitle`.[111]

Online magazine articles: same as other online articles.

Crossreferencing from the magazine subtype to the `@periodical` is also available, but there is not much reason to use it.

## 17.4 Newspaper Articles

Enter "newspaper" in `entrysubtype`. Like `@letter` and archival documents, newspaper articles are added to the bibliography category "noteonly" so that they can easily be omitted from the bibliography. Restore them to the bibliography by deleting or modifying the clause `notcategory=noteonly` in the `\printbibliography` command. In individual cases, if an article is important or frequently referred to, consider switching to entrysubtype "magazine," to keep it out of the "noteonly" category.

To make bibliography entries only for the newspapers, and not for the individual articles, create `@periodical` entries for each newspaper and link the individual `@article` entries to it using the `xref` field.

Page numbers of newspaper articles are omitted by Turabian, but `historian` will print them if they are entered. Identify the newspaper's edition in `addendum`. Otherwise newspaper articles are treated much like magazine articles.[112]

### 17.4.1 Special Format Issues

To add the city of publication in parentheses after the newspaper title, enter it in the field `location`.[113]

When authorship is to be attributed to a news service, simply enter it in curly brackets (to prevent inappropriate parsing into first and last names) in

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109. Alan D. Sokal, "A Physicist Experiments with Cultural Studies," *Lingua Franca*, May/June 1996, 62–64.

110. Barbara Wallraff, World Court, *Atlantic Monthly*, June 2005, 128.

111. *New Yorker*, Talk of the Town, Apr. 10, 2000.

112. Henry Fountain, "Richard Westfall dies at 72: Wrote Biography of Newton," Obituary, *New York Times*, Sept. 1, 1996.

113. Linda Seebach, "A Bold Scientist Fights the Tyranny of Reality," *The Sun* (Baltimore), May 15, 1996, 17a.

the `authorfield`. It does not need to be italicized, as in the case of a journal as author, so leave `authortype` blank.

### 17.4.2 Special Types of Newspaper Citations

**Regular columns**   Same as magazine columns. Use `titleaddon` for the name or type of column.[114]

**Letters to the editor**   Cite generically with "letter to the editor" in `titleaddon`, without any headline or title. (`Historian` will, however, print a `title`, if one is entered.)[115]

**Articles in supplements**   Same as magazines.

**Articles published online**   Same as online journal articles: in addition to the url, enter all the available publication data, so that the article can be located even without the url. For articles found in online databases, again give all the available publication data, so that the article can be found even without the database. Also include the stable url of the article within the database, and the access date, and make sure the `url`, `doi`, and `eprint` options are set accordingly.

## 17.5 Additional Types of Published Sources

### 17.5.1 Classical, Medieval, and Early English Literary Works

Footnotes only. Give author, title, and section or line numbers. Use the `pagination` function of `biblatex` to switch from page numbers to the appropriate edition-independent numbering scheme.

**Classical Works**   Use the subtype "classic" of `@book`. The reference will be added to the "noteonly" category, and most publishing data will be omitted. (`Historian` will also print `edition` in parentheses, and the `note`, and `addendum`.) No punctuation will be inserted between author and title.[116]

Punctuation should also be omitted between the title and any line or section numbers in the `postnote` argument, but `historian` will not do this automatically. For full compliance with Turabian guidelines, use the citation command `\footcitenodot` to get rid of the comma before the `postnote`.[117] (Don't forget to supply the space before the page or section number in the postnote, since `\footcitenodot` prints the postnote immediately.)

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114. Fountain, see n. 112.

115. Virginia O'Hanlon, letter to the editor, *New York Sun*, Sept. 21, 1897.

116. Aristotle *History of Animals*, without abbreviations.

117. With full title and author: Aristotle *History of Animals* 1.6.

Author names may be abbreviated. Use the `@shortauthor` field for the abbreviation. Abbreviate titles, too, using `shorttitle`.[118] Sometimes there is only an author and no title.[119]

In repeated references, `historian` uses a short form instead of ibid. and instead of crossreferencing to previous notes. `Historian` will, however, use the `shorthand` if one is available.[120]

If the `\printbibliography` command is modified to allow classics in, full names and titles will be printed.

**Medieval Works**   Same as classics.

**Early English Works**   Resemble classics, in that full publishing data and bibliography entry are not required, but they have the usual punctuation. Use the entrysubtype "canon" of `@book`.[121]

For parts of early English or other canonical works, use `@inbook` with entrysubtype "canon.".[122] Crossreferencing from `@inbook` to `@book` is also available for the "canon" subtype.[123]

### 17.5.2 The Bible and Other Sacred Works

Same as classics, but titles are not italicized. Use entrysubtype "biblical" of `@book`, leave `author` empty, and give title abbreviations in `shorttitle`. Versions can be identified in the `edition` field and they are printed in parentheses. Use the citation command `\footcitenodot` to suppress the punctuation before any line or verse ranges in the `postnote` argument.[124]

As in the "classical" subtype, ibid. is not used in repeated citations, but `edition`, `note`, and `addendum` are not repeated.[125]

### 17.5.3 Reference Works

For well-known reference works, for which the full authorship, editorship, and publication data are not needed, use the entrytype `@reference` for the reference as a whole, and `@inreference` or just a `postnote` argument for the individual entry. These entrytypes are intended for the footnotes only.

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118. With abbreviated title and author: Arist. *Hist. Anim.*, using abbreviations in footnotes.

119. Thuc. 2.40.2-3.

120. Arist. *Hist. Anim.*; Aristotle *History of Animals.*

121. Milton, *Paradise Lost*, 1.83.

122. Chaucer, "Wife of Bath's Prologue," *Canterbury Tales*, without crossreferencing.

123. Chaucer, "Wife of Bath's Prologue," *Canterbury Tales* , using xref.

124. 2 Kings (New Revised Standard Version) 11.8.

125. 2 Kings.

If full publication data and bibliography entries seem called for, switch to `@collection`/`@incollection`.

Examples of reference works.[126] Individual entry in the `postnote` of a `@reference`, using "sub verbo."[127] (Note the use of `\mkbibquote` in the `postnote` to make sure the punctuation goes inside the quotation marks.) Individual entry as an `@inreference`.[128] Individual entry as an `@inreference`, linked via `xref` to the `@reference`.[129]

Reference works and items from reference works are not normally included in the bibliography under Turabian rules. `Historian` adds their entry keys automatically to the "noteonly" category so that the recommended `\printbibliography` command, `\printbibliography[notcategory=noteonly]` will omit them.

In case you do decide to include `@reference`s and `@inreference`s in the bibliography, `historian` prints them title first. This works well as long as the `@reference` does not have an author or editor and gets sorted into the bibliography automatically by the title. If it does have an author or editor, copy the title to the `sortname` field and enclose it in curly brackets to prevent spurious parsing into first and last names.[130]

### 17.5.4 Reviews

Use entrytype `@article` (or `@review`, which `historian` does not distinguish from `@article`), with the appropriate `entrysubtype`, such as "newspaper." Simply describe the reviewed item in the `titleaddon` field, with manual formatting as follows, for books: `review of \emph{Title}, by Author`; or for performances: `review of \emph{Title}, by Author, directed by Director`, etc. To ensure proper sorting, it may sometimes be necessary to repeat the information from `titleaddon`, without the formatting instructions, in `sorttitle`.

Titles are not required,[131] but will be printed if entered.[132]

Turabian does not require reviews to appear in the bibliography, but `historian` does not automatically omit them or add them to the noteonly category. To omit

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126. *Dictionary of Scientific Biography*; *Brockhaus Enzyklopädie*, 17th ed.

127. *Deutsches Wörterbuch* (henceforth cited as Grimm's Dictionary), s.v. "Veredeln."

128. Thomas Henry Huxley, "Evolution I: Evolution in Biology," in *Encyclopaedia Britannica*, 9th ed.

129. Vítězslav Orel and Robert C. Olby, "Mendel, Gregor," in *New Dictionary of Scientific Biography*.

130. *Grammatisch-kritisches Wörterbuch*, 2nd ed. (henceforth cited as Adelung's Dictionary).

131. [Heinrich Georg Bronn], review of *The Origin of Species,* by Charles Darwin, *Neues Jahrbuch für Mineralogie, Geognosie, Geologie und Petrefaktenkunde* (1860): 112–116.

132. [C. H. Waddington?], "Individual Paradigms and Population Paradigms," review of *The Case of the Midwife Toad*, by Arthur Koestler, *Times Literary Supplement*, Oct. 22, 1971, 1309–1310.

individual reviews, see the instructions under 16.2.3. If one uses the entrytype `@review` consistently, all reviews can be kept out of the bibliography by using the clause `nottype=review` in the `\printbibliography` command.

### 17.5.5 Abstracts

`Historian` provides no special treatment for abstracts. Full compliance with Turabian requires some manual intervention.

Two cases must be distinguished: abstracts published alongside the full-length article, and abstracts published separately. In either case, follow the instructions under 16.2.3 to have the abstract omitted from the bibliography.

**Abstracts published alongside an article**  Enter the full article information in an `@article`, and simply add the word "abstract" in `titleaddon`.

**Abstracts published separately**  There is no dedicated entrytype or subtype for separately published abstracts. The preferred solution is to cite the full article as an `@article` entry and use the `addendum` field for the text "abstract in" and the location of the abstract. LaTeX formatting instructions may have to be entered manually in the `addendum`.

Or, one could enter the article and the abstract in two different entries, and cite them consecutively with an appropriate note in-between, e. g., in the first `postnote` argument. This example uses the multicite command `\footcitenodots` to eliminate the usual punctuation between citations.[133]

```
\footcitenodots[][abstract in]{albin2003negotiating-int}[][]{200515}
```

The disadvantage of this second solution is that it generates two bibliography entries for the same source, so one will have to filter one out, e. g., by adding it to the noteonly category, using `\addtocategory{noteonly}{citekey}`. The abstract entry will usually have no title or author of its own, so, if it is included in the bibliography at all, it will probably not be sorted properly. In the above example, second entry is not filtered out, but the `journaltitle` is copied to `sorttitle` to ensure proper sorting in the bibiliography.

### 17.5.6 Pamphlets and Reports

Turabian does not distinguish between these and books, except that they may sometimes be left out of the bibliography. `Historian` makes only minor distinctions among the various book-like entrytypes that `biblatex` offers (`@book`, `@booklet`, `@report`, `@manual`, `@misc`), and does not automatically omit any of them from the bibliography.

Entrytype `@book` may be used in most cases, even if the `howpublished` or `institution` field is used instead of `publisher`. The other entrytypes do offer a

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133. Cecilia Albin, "Negotiating International Cooperation," *Review of International Studies* 29 (July 2003): 365–85, abstract in *Peace Research Abstracts Journal* 42, no. 236625 (Feb. 2005): 6.

few additional fields: `type`, `organization` or `version` (see the entrytype descriptions in 5, above, for details).

Example of a report on a special meeting of a scientific society, using `titleaddon` to add information about the nature of the report, and `organization` to identify the society.[134]

### 17.5.7 Microform Editions

Format as usual and use the `addendum` field to specify that a microform edition was used.[135]

### 17.5.8 CD-ROMs or DVD-ROMs

In book- and collection-like items, use `type` for the electronic medium.[136] A `version` field is also available.

### 17.5.9 Online Databases

On journal articles from online databases, see 17.4.2, above.

Documents or other sorts of records from online databases: both the individual document and the database are to be cited in the footnote, but only the database in the bibliography. In `historian`, use the same system as for manuscripts and archival documents (17.6.4, below): make two linked entries: a `@customd` (or, where appropriate, `@letter`) for the individual document, but an `@online` entry for the database as a whole. Link them by entering the entry key of the `@online` database in the `xref` of the `@customd`. (This example also illustrates the use of the `type` field to indicate that the document is a letter.)[137]

By default, the title of the individual document is printed in quotation marks. If it is a book-like document that needs to be italicized, as in the following example, enter "book" as the `entrysubtype`.[138]

The use of `shorthand`s or `label`s in the parent entries (i.e., `@online`, in this case) is highly recommended, especially when there is no author or editor to use in repeated citations.

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134. Karl Sudhoff, *Hundert Jahre Gesellschaft Deutscher Naturforscher und Ärzte*, Report on the hundredth anniversary meeting, German Society of Naturalists and Physicians (Leipzig: F. C. W. Vogel, 1922).

135. August Weismann, *Über den Einfluss der Isolierung auf die Artbildung* (Leipzig: Wilhelm Engelmann, 1872), microprint, in the Landmarks of Science II collection.

136. Manfred Overesch et al., eds., *Das Dritte Reich: Daten—Bilder—Dokumente*, Digitale Bibliothek 49, CD-ROM (Berlin: Directmedia, 2001).

137. Charles Darwin, "Mr. Darwin on Vivisection," letter, Apr. 18, 1881, The Complete Work of Charles Darwin Online (henceforth cited as Darwin-Online).

138. Charles Darwin, *The Zoology of the Voyage of H.M.S. Beagle*, 1838–1843, Darwin-Online.

## 17.6 Unpublished Sources

### 17.6.1 Theses and Dissertations

Use entrytype `@thesis`. Enter the type of thesis in `type`, either written out or using the keys "mathesis" or "phdthesis" to generate the bibstrings "PhD diss." or "master's thesis," which are what Turabian prescribes. The degree-granting institution goes in `institution`,[139] and where appropriate, the database, microfilm, or other medium goes in `addendum`.[140]

### 17.6.2 Lectures and Papers Presented at Meetings

Use entrytype `@unpublished`. The principal entry fields are printed in the following order, with the following punctuation:

In footnotes: `Author`, "`Title`" (`type`, `howpublished`, "`eventtitle`," `organization`, `venue`, `date`).

In bibliography: `Author`, "`Title`." `Type`, `howpublished`, "`eventtitle`," `organization`, `venue`, `date`.

Example of a paper presented at a conference,[141] and an abstract from a conference program.[142]

Example of a draft manuscript.[143] If the manuscript is in press or close to publication, it can also be entered as a `@book` or `@article`, with "forthcoming" in the `year` field. Or, it can be treated as an archival document (see 17.6.4 below).

### 17.6.3 Interviews and Personal Communications

`Historian` has no dedicated entrytype for interviews, but they can easily be accommodated in `@customd`, since they need not be included in the bibliography. Enter the interviewee as the `author`, "interview with" or other appropriate text in `titleaddon`,

139. Anne Mylott, "The Roots of Cell theory in Sap, Spores, and Schleiden" (PhD diss., Indiana University, 2002); Sander Gliboff, "Evolution, Revolution, and Reform in the Austrian Empire: The Career of Franz Unger (1800-1871)" (master's thesis, The Johns Hopkins University, 1997).

140. Judith Johns Schloegel, "Intimate Biology: Herbert Spencer Jennings, Tracy Sonneborn, and the Career of American Protozoan Genetics" (PhD diss., Indiana University, 2006), ProQuest publication number AAT 3223050.

141. Sander Gliboff, "The Spoiler: Paul Kammerer's Fight for the Inheritance of Acquired Characteristics" (paper, presented at the workshop, "The Viennese Roots of Theoretical Biology: The Vivarium Centenary," Konrad Lorenz Institute For Evolution & Cognition Research and the Austrian Academy of Sciences, Vienna and Altenberg, Austria, Sept. 23, 2002).

142. Robert J. Richards, "Why Haeckel Became a Virulent Darwinian" (unpublished abstract, annual meeting of the History of Science Society, Vancouver, BC, 2000).

143. Sander Gliboff, "The Spoiler: Paul Kammerer's Fight for the Inheritance of Acquired Characteristics" (unpublished manuscript, available from the author, n.d.).

and interviewer in `namec`.[144] `Historian` inserts no punctuation between `titleaddon` and `namec`.

Other fields are available in `@customd` for locating the transcript or other documentation of the interview, including, `booktitle`, `eventtitle`, `organization`, `institution`, `library`, `userd`, `volume`, `pages`, and the usual online locators.

Alternatively, as with the archival documents, in 17.6.4, below, `@customd` can also be linked via `xref` to a `@collection`, `@online` database, or `@customa` (archive) where the interview might be found.

Similarly, personal communications, such as conversations and e-mail messages, also belong in the notes only and can be entered as `@customd` or `@letter`. Enter the sender as `author`, "e-mail message to" or other appropriate text in `titleaddon`, and recipient in `namec`. For details, see 17.1.9, above, and 17.6.4, below.

### 17.6.4 Manuscript Collections

Use entrytype `@customa` (a for *a*rchive) for the collection, and either `@letter` or `@customd` (d for *d*ocument) for individual items in the collection. Link the item to the collection by copying the entry key of the `@customa` to the `xref` field of the `@letter` or `@customd`.

`@Customa` records are included in the bibliography; `@letter`s and `@customd`s are added to the "noteonly" category so that they can easily be excluded by the command `\printbibliography [notcategory=noteonly]`. If this is not desired, delete the `notcategory` option or use a different system of filtering (see the `biblatex` documentation).

**Archives and Manuscript Collections**   The entrytype `@customa` was designed under the assumption that manuscript collections will usually be named after an author, collector, or organization, and that their bibliography entries should be sorted by that name. Hence, one should use the `author` and `nameaddon` fields, wherever feasible, to name the manuscript collection. In this example, the Richard Benedict Goldschmidt Papers has "Richard Benedict Goldschmidt" in `author` and "Papers" in `nameaddon`.[145] If you find this awkward, or in cases where there is no appropriate name, simply leave `author` and `nameaddon` blank, and the entry will be sorted by `title` instead (see the Cold Spring Harbor example, below).

For identifying the depository where the manuscript collection can be found, `historian` uses the following fields, which are printed in the following order: `organization`, `institution`, `library`, and `location`. Typically, `library` and `location` will suffice and the others can be left blank. These fields are printed without italics or quotation marks. In the example of the Goldschmidt Papers in the previous footnote, the `institution` is the University of California and the `library` the Bancroft Library.

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144. Theodosius Dobzhansky, interview with Barbara Land, 1962.

145. Richard Benedict Goldschmidt Papers, University of California, Bancroft Library, Berkeley (henceforth cited as Goldschmidt Papers).

The field `type` may be used to give further information about the type of collection, and will appear after `location`.[146]

The custom field `usera` is for call numbers, box labels, or other filing information that might be needed for locating the manuscript collection within the library or other institution. Use of this field is illustrated in the example of the Goldschmidt Papers, above.

Online locators such as `url` are also supported, if the collection happens to be available online, or in case you wish to treat an online database as a manuscript collection.[147] See 17.5.9, above, for the use of `@online` for online databases.

The use of `shorthand`s is highly recommended, in case the manuscript collection is cited repeatedly.[148]

### Letters and Other Documents in Archives and Manuscript Collections

**Letters**  Use `@letter`. Archived letters are handled similarly to letters in published collections, as described above in subsection 17.1.9, except that the `xref` field will contain the entry key of a `@customa` entry.[149] Another example, demonstrating the use of shorthands in a repeated citation of a `@customa` entry.[150]

The preposition "to" will automatically be printed between `author` and `namec`, as long as `namec` contains any data.

`Namec` is followed by `title`, `titleaddon`, `type`, `venue`, `note`, and `date`(or `day`, `month`, and `year`).

If the date is uncertain and brackets, question marks or other non-numeric data must be entered, which the `date` field cannot accommodate, use `year` or even `pubstate` instead. `Note` can also be used for information about the dating. This example uses both `note` (for "undated") and `year` (for "late Dec.[?], 1905)..[151]

`Venue` is the place from which the letter was sent or the document written.

`Type` is the type of communication, e. g., "telegram," "e-mail," or "memorandum." It should be left blank for ordinary letters or if the type is obvious. (My examples tend to give more precise type information than necessary.)

`Userd` is for for call numbers, box- and folder numbers, or other information needed to locate the item in a cross-referenced archive or other collection of entrytype `@customa`.

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146. William Bateson Papers, American Philosophical Society Library, History of Science Collection, Philadelphia, microfilms, film no. 26.

147. Cold Spring Harbor Eugenics Archive, online document collection.

148. Goldschmidt Papers.

149. Richard Semon to Ernst Haeckel, postcard, Dec. 28, 1905, Ernst Haeckel Papers, Ernst-Haeckel-Haus, Jena (henceforth cited as Haeckel Papers), Best. A, Abt. 1.

150. Albert Einstein to Richard Goldschmidt, typewritten letter signed, Feb. 11, 1942, Goldschmidt Papers, box 2, Einstein folder.

151. Richard Semon to Ernst Haeckel, postcard, undated, late Dec.[?], 1905, Haeckel Papers, Best. A, Abt. 1.

`Url`, `urldate` and the other online locator fields are taken from the `@letter` and `@customd` entries, not from the corresponding `@customa` fields.

**Other documents**   Use `@customd` for the individual document and link via `xref` to a `@customa` entry for the collection as a whole.

The following fields are read from the `@customd` entry and printed in the following order: `author`, `title`, `titleaddon namec`, `type`, `venue`, `note`, and `date`.

`Title`s are printed in quotation marks, by default. Generic or descriptive titles that do not require quotation marks should go in `titleaddon` or `type`. in exceptional cases, where the title needs to be italicized, use `entrysubtype` "book" of entrytype `@customd`. A `booktitle` field is also available, to allow for citations of parts of book-like documents.

The main differences between `@customd` and `@letter` are in the treatment of `title`, `titleaddon`, and `namec`.

`@Letter`s are expected to have a recipient in `namec` and no `title` or `titleaddon`. The word "to" will be inserted automatically between the `author` and the `namec` of a `@letter`.

`@Customd` documents, on the other hand, are expected to have a `title` and/or `titleaddon`, and may or may not have a correspondent in `namec`. The `title` and `titleaddon` come between the `author` and the `namec`. If the reference is to a communication of some sort and a "to" is required, enter it manually in `titleaddon`. Other connections between the two names can also be made using `titleaddon`, such as "interview with." No punctuation is generated between `titleaddon` and `namec`. Enter punctuation manually at the end of `titleaddon`, if needed.

Examples of `@customd` documents.[152]

If a `@letter` or `@customd` document is entered without a `xref` to a `@customa` archive or other collection, `historian` will look for collection information in the `@letter`- or `@customd`-entry itself and try to format it appropriately.

There are special short forms for repeated citations of `@letter`s and `@customd`s: `Author`s, recipients and dates are are used to identify `@letter`s. `Title`s, `titleaddon`s, and `namec`s are used for `@customd`s..[153]

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152. Theodor Boveri, black notebook, 1903–5, Theodor Boveri Papers, Abteilung für Handschriften und seltene Drucke, Bayerische Staatsbibliothek, Munich, folder A3, call number Ana 389 a 3; August Weismann, "Pultkalender mit Tagebuchaufzeichnungen," desk calenders, 1877–1914, August Weismann Papers, Universitätsbibliothek Freiburg, Freiburg im Breisgau, in 4 boxes, marked 1877-1887, 1888-1896, 1897-1904, & 1905-1914; August Weismann, "1887 im Dezember nach Neapel mit Ischikawa," notebook, 1887, Weismann Papers, box: "Tagebücher/Notizbücher, 1872–1892," folder: "1883–1892"; Paul Kammerer, "Entwicklungsmechanik der Seele," from *Der freie Gedanke* (Prague), newspaper clipping, 1920, Paul Kammerer Papers, American Philosophical Society Library, Philadelphia, BK128.

153. Semon to Haeckel, Dec. 28, 1905, see n. 149; Einstein to Goldschmidt, Feb. 11, 1942, see n. 150; Boveri, black notebook, see n. 152.

## 17.7 Informally Published Electronic Sources

Many online sources can and should be treated as `@book`s, `@article`s, `@customd` documents or other entrytypes, with the addition of urls and other online locators in the appropriate fields (or, in the case of `@customd`, possibly with `xref` to an `@online` database). Where these options are not practicable, use entrytype `@online` as follows.

### 17.7.1 Web Sites

The `@title` field is for the title of the web page and is normally printed in quotation marks. This can be varied through the use of the `entrysubtype`: The subtype "database" produces roman titles.[154] In case the web page is so extensive and permanent that it seems to require an italicized title, use the `entrysubtype` "book" (this is not foreseen in Turabian). To cite a portion of such a book-like page or site, leave `entrysubtype` blank and use `title` for the smaller portion and `booktitle` for the site as a whole.

The title or owner of the site, and other sorts of credits, are printed in roman type and may be entered in any of the following fields, which are printed in the following order: `organization`, `institution`, bibfieldpublisher, and `howpublished`,[155] But sometimes the owner of the site may function as the `author`, as in this example.[156] (Don't forget the curly brackets when needed to prevent corporate names from being parsed into first and last names.)

If titles are altogether lacking, use `titleaddon` for a descriptive phrase or generic title that will be printed without quotation marks. The `type` field can also be used for short descriptions of the type of page or site.

The previous example also illustrates the use of the `userd` custom field for providing instructions for navigating to the source (e. g., "under heading A"). The `postnote` argument can also be used for this purpose: see 17.1.10, above.

### 17.7.2 Weblog Entries and Comments

**Blog entries**  For blog entries or comparable subsidiary texts by the main author of the blog or site, use the `entrysubtype` "blog" of entrytype `@online`. Entries of this subtype will be added to the "noteonly" category for omission from the bibliog-

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154. Science in the Nineteenth-Century Periodical: An Electronic Index, version 1.0, URL: http://www.sciper.org (accessed 04/08/2009).

155. Roger Koeniker, "Society for the Preservation of Gaps in the Literature," Econometrics at the University of Illinois, URL: http://www.econ.uiuc.edu/~roger/gaps.html (accessed 04/08/2009).

156. Oregon State University Libraries, Special Collections, "Linus Pauling and the Race for DNA: A Documentary History," under "narrative," URL: http://osulibrary.orst.edu/specialcollections/coll/pauling/dna/index.html (accessed 12/29/2008).

raphy.[157] The title of the entry goes in the `title` field and the title or owner of the blog or site in `organization`, `institution` and/or `howpublished`. In the example, the text "blog entry" is from the `type` field, "posted" is generated automatically, and the date is from the `date` field. There is no automatically generated punctuation between `type` and `date`.

**Blog comments**   Rather than dedicate a special subtype to readers' comments or comparable subsidiary texts not by the site owner or main author, `Historian` currently uses the same subtype ("blog") as above, for blog entries. Some manual formatting may be necessary to adequately describe and locate the comments.

Leave `title` blank (unless the comment has its own title), and enter an appropriate descriptive text in `titleaddon`. In this example,[158] `titleaddon` also contains the title of the blog entry, with manually inserted quotation marks:

```
reply to cutthroat stalker, comment on
 \mkbibquote{More Kantian eloquence}
```

Alternatively, one could identify the comment in the `prenote` argument, while citing the blog entry:[159]

```
\autocites[Comment by ``El Cid,'' comment no. 12 on][]
{myers2007trolling-faith}
```

### 17.7.3 Electronic Mailing Lists

**Listserv messages**   No dedicated form for listserv messages. Leave `entrysubtype` blank and provide appropriate descriptors in `titleaddon`.[160] In this example, `titleaddon` contains the text "e-mail to H-German list."

Turabian requires only the author, the list name, the date, and the url, but `historian` will print titles and other information, if it is entered.

## 17.8 Sources in the Visual and Performing Arts

### 17.8.1 Visual Sources

Use entrytype `@artwork` or `@customd` (the current version of `historian` does not distinguish between the two). These will automatically be added to the "noteonly" category for omission from the bibliography.

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157. P. Z. Myers, "Trolling faith-heads: Your efforts are futile," blog entry posted Sept. 18, 2007, Pharyngula, URL: http://scienceblogs.com/pharyngula/2007/09/trolling_faithheads_your_effor.php (accessed 04/09/2009).

158. Matt Dunn, reply to cutthroat stalker, comment on "More Kantian eloquence," posted Dec. 10, 2008, Fishbeer Blog, URL: http://fishbeer.com/post/more-kantian-eloquence/ (accessed 04/11/2009).

159. Comment by "El Cid," comment no. 12 on Myers, see n. 157.

160. Richard Weikart, "Re: REV: Gliboff on Weikart, _Darwin to Hitler_ (Weikart)," e-mail to H-German list, Sept. 30, 2004, URL: http://h-net.msu.edu/cgi-bin/logbrowse.pl?trx=lx&list=H-German&user=&pw=&month=0409 (accessed 04/11/2009).

Link the individual work, when necessary, via `xref` to a museum or other collection in a `customa` entry.

By default, `historian` prints the title of the artwork in quotation marks. Where Turabian requires italics (e. g., for paintings and sculptures), enter "book" as the `entrysubtype`.

### 17.8.2 Live Performances

**Theater, music, and dance**   Use entrytype `@performance`, which will automatically be added to the "noteonly" category for omission from the bibliography. Unlike `@customd`, `@performance` prints titles first, then the authors, and there is no `xref` function.[161]

Use the `title` field for the title of the performance, `date` for its date, and `venue` field for the name of the theater. `Eventtitle` and `eventdate` are not used.

By default, `historian` prints the title of the piece in quotation marks. Where Turabian requires an italicized title (e. g., for plays and long pieces of music), enter "book" as the `entrysubtype`.

There are no dedicated fields for performers and directors. Name them and their roles in the `note` field. If the performer needs to be emphasized, he or she can sometimes be named in the `prenote` argument instead of the `note`.

This entrytype is intended for use in the footnotes only. Should you decide to include it in the bibliography (by modifying the `\printbibliography` command), it will still begin with the title, but will be sorted, like the rest of the bibliography, by author. In such cases, copy the title to the `sortauthor` field.

**Recordings**   Sound, video, and online recordings are treated separately, below, under 17.8.4, 17.8.5, and 17.8.6.

**Movies**   Again, use `@performance` (or `@movie`, which is synonymous) if the reference is to a movie shown in a theater, not a video recording. Identify the director in `note`. The `howpublished` field can be used for movie distributors, and `publisher` for production companies. Leave out the venue and give the year of release instead of the date of the viewing.[162]

**Repeated references to `@performances`**   There is a modified short form, without the author label.[163]

### 17.8.3 Television Programs and Other Broadcast Sources

**Programs**   Again, use `@performance` if the reference is to a broadcast, not a video recording. The title of the series goes in the `title` field and is printed first. Use `note` for the title (enter the quotation marks manually, using `\mkbibquote`) and

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161. *Birdie Blue*, by Cheryl L. West, directed by Seret Scott, Second Stage Theater, New York, June 22, 2005.

162. *Capote*, directed by Bennett Miller, Sony Pictures Classics, 2005.

163. *Birdie Blue*, see n. 161.

number of the episode, the performers, and any other significant information about the program or episode for which no dedicated field is available. In the case of a re-broadcast of an old episode, use `origdate` for the date of the original broadcast and `origtitle` for appropriate explanatory text, such as "originally aired."[164] Use `venue` to identify the station or distributor.[165]

**Recordings**    Video, and online recordings of broadcast programs are treated separately, below, under 17.8.5, and 17.8.6.

**Interviews**    Broadcast interviews require some improvisation. Enter them in the same manner as print or manuscript interviews, using `@customd` (see 17.6.3, above), with the name of the television program and the name of the station or distributor both in `venue`.[166] Manual formatting of the venue will be required, in this case, "`\mkbibemph{News Hour}`, PBS" was entered.

**Advertisements**    Again, use `@customd`, and enter whatever information might be available. In the following example, the sponsor of the ad functions as the `author` and is entered in curly brackets to avoid parsing into first and last names; "advertisement" is given as the `type`; and the time and circumstances of its airing are written out (with manual formatting) in the `note` field.[167]

### 17.8.4 Sound Recordings

Use entrytype `@audio` (or `@music`, which is formatted identically). Recordings are presumed to be more permanent and to have more stable bibliographic data than live performances, and are therefore included in the bibliography as well as the footnotes.

Turabian gives the option of sorting the entry by author or title, or even conductor or performer, depending on the emphasis in the main text. Under `historian`, the choice must be made when the data are entered: Enter the most important name in the `author` field and use the `nameaddon` to indicate his or her role in the recording. Names and roles of subsidiary importance can be listed freeform in the `note` field. Leave `author` blank to allow sorting by `title`.

The `publisher` field can be use for production companies; `howpublished` for any other needed details about distribution and availability; `venue`, `eventtitle`, and `eventdate` for concerts and other non-studio recordings; `type` for the recording medium; and `usera` and `userd` for, e. g., collection and catalog numbers.[168]

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164. *Seinfeld*, "The Opposite," episode 86, Sept. 22, 2005 (originally aired May 19, 1994).

165. *All Things Considered*, NPR, Apr. 20, 2006.

166. Condoleeza Rice, interview by Jim Lehrer, *News Hour*, PBS, July 28, 2005.

167. Federal Express, "Caveman," advertisement, aired during *Super Bowl Xl*, Feb. 5, 2006.

168. Thomas Andrew Lehrer ("Tom Lehrer"), "That Was the Year That Was," Reprise Records, 12 inch LP, R/RS 6179, 1965.

To cite individual tracks from a larger recording, use `title` for the title of the track and `booktitle` for that of the recording as a whole.[169]

### 17.8.5 Video Recordings

Turabian calls for video recordings to be formatted like books, only with additional information about the `type` of medium. Use entrytype `@video` and try to fit the production and distribution data into the same fields that are used for books, such as `publisher`. `Howpublished` and `institution` are also available. `Note` can still be used as in `@performance` for directors and performers, but `titleaddon` is better, since `note` is printed later and is intended mainly for information about the edition or book series.[170]

Sometimes a single track or other portion of a video recording will need to be cited individually. In the absence of a dedicated "invideo" entrytype, `historian` implements an entrysubtype "video" of `@inbook` for this purpose. It prints the `title` of the portion in quotations marks and uses `booktitle` for the recording as a whole. Information about the performers, director, and so on should go in `titleaddon` or `booktitleaddon` instead of `note`.[171]

### 17.8.6 Online Multimedia Files

The entrytype `@audio` can be used, regardless of whether the recording is online, distributed as a podcast, or on a more traditional medium. All the same fields used by the entrytype `@online` for identifying a web page or site are available in `@audio`, too (see 17.7.1, above).

For online videos, however, the book-like formatting of the `@video` entrytype, with its "location: publisher, year" structure, becomes less appropriate. Enter "online" in the `entrysubtype` in order to switch to the less structured listing of publication and location information used in `@online`, and to place the title in quotation marks instead of italics (again, see 17.7.1, above).[172] Or simply switch to the `@online` entry type.

`@Online` can also be used for any multimedia files. There are very few practical differences between it and the preceding two options.

In any case, use `type` for the type of multimedia file and `customd` for additional locating info, such as where to click on the web page or the time at which the cited

169. Tom Lehrer, "Alma," *That Was the Year That Was*, Reprise Records, 12 inch LP, R/RS 6179, 1965.

170. Martin Lavut, *After Darwin: Genetics, Eugenics, and the Human Genome*, on 2 videocassettes, written and directed by Martin Lavut, produced by Arnie Gelbart (Hamilton, NJ: Films for the Humanities & Sciences, 2000).

171. John Cleese et al., "Commentaries," disc 2, *Monty Python and the Holy Grail*, directed by Terry Gilliam and Terry Jones, special ed., DVD (Culver City, CA: Columbia Tristar Home Entertainment, 2001).

172. BBC, "Blair Announces New Africa Panel," Windows Media Player video file, BBC News Web site, at the 3:43 mark, URL: http://news.bbc.co.uk/nolavconsole/ifs_news/hi/newsid_5110000/newsid_5119200/nb_wm_5119262.stm (accessed 06/27/2006).

material appears in the file (that's what the "3:43" is in the preceding example, which is slightly modified from Turabian).

(In order to reconstruct Turabian's example exactly, the time mark would have to go in the `postnote`, which would keep it out of the bibliography, and the cite command would have to be changed to `\footciteurllast`, which would move it in front of the url.)

### 17.8.7 Texts in the Visual and Performing Arts

**Art Exhibition Catalogs**   Requires additional information about the title and location of the exhibit in the bibliography (not in the footnotes), but otherwise like a `@collection`. `Historian` includes a custom field, `userc` (`c` for catalog) for this purpose.[173]

**Plays**   Use entrytype `@book`. If the play is well known, consider using `entrysubtype` "canon," to abbreviate and omit from the bibliography, as for early English literature (see 17.5.1, above).

**Musical Scores**   Use entrytype `@book` for published scores; `@customd` for unpublished manuscripts.

## 17.9 Public Documents

Turabian distinguishes many kinds of public documents, there is no single format or entrytype for all of them.

The following elements are common to most public documents and should be entered in the fields indicated:

### 17.9.1 Elements to Include, Their Order, and How to Format Them

**Name of the government and government body** goes in `author`.   Use curly brackets to prevent unwanted parsing into first and last names.   Also use `shortauthor` if you want to use an abbreviation or alternative form in the footnote. To omit the government or governing body entirely in the footnote, enter "redundant" in `authortype`.

**Title of the document or collection** goes in `title` and is usually italicized.

    `@Legal` and `@legislation` italicize the title by default. Switch to `@article` or `@inproceedings` for quotation marks. The `entrysubtype` "case" of `@legal` will print titles in plain roman. **Needs updating**

    Sometimes an italicized title needs to be preceded or followed by roman text. In`@legislation` use `type` for leading text, such as "Bill" or "Proclamation"; and `titleaddon` for following text, such as "executive order no. 2111."

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173. Erna Aescht, Gerhard Aubrecht, and Erika Krauße, eds., *Welträtsel und Lebenswunder: Ernst Haeckel, Werk, Wirkung und Folgen*, Stapfia 56 (Linz: Oberösterreichisches Landesmuseum, 1998).

In cases where the title is always to be abbreviated in the footnotes, enter a `shorttitle` and set the entry option `useshorttitles` or `useshorttitles=true` in the `options` field (the *Congressional Record*, e. g., is usually treated this way). See 2.3, above.

**Name of an individual author or editor.** If an editor is named, it goes in `editor`, `compiler`), or any other of the editorial-role fields that might be appropriate. Since the `author` field is already used, any subsidiary authors must go in the custom field `namea`.

**Report number or other identifiers** may go in any of the following: `titleaddon` `series`, `number`, or `note`, all of which precede the publishing data (if there are any) and the date; `usera` or `userd`, which follow the publishing data and date; `addendum` if it belongs at the end; or `userc` for things that belong only in the bibliography.

**Place of publication and publisher's name** may be omitted if the publisher is the same as the issuing body already given as the `author`. Otherwise use `location` and `publisher` as usual.

**Date.** Often, `year` will suffice, but `historian` will print `month` and `day` (or `date`) if entered.

**Page numbers or other locators, if relevant** can go in `pages` or in the `postnote` argument. Use the `pagination` function of `biblatex` for alternative numbering schemes.

Many public documents can be formatted satisfactorily by the standard entrytypes such as `@report`, `@proceedings`, `@inproceedings`, or `@article`. For the more difficult cases, use `@legislation` or `@legal`. `@Legal` is intended for footnotes only, not for inclusion in the bibliography.

In many public documents, the author must be abbreviated or even omitted in the footnotes, but given in full in the bibliography. The entrytype `@legislation` will automatically substitute `shortauthor` (if available) for `author` in the footnotes. When using other entrytypes, set the `useshorttitles` option (in the `options` field of the entry) to get the same effect. Use `authortype` "redundant" to suppress `author` entirely in the footnotes.

Titles will not automatically be abbreviated, except in repeated references to the same document. In cases where abbreviation is called for even in first citations, use the `useshorttitles` option (in the `options` field of the entry).

In repeated citations, both `@legal` and `@legislation` use `shorttitles` and `shortauthors`, never author alone, and never ibid.or crossreferences to earlier notes.

### 17.9.2 Basic Formats for Public Documents

Here I depart from Turabian's organization and presentation. Instead of going by type of document (legislation, treaty, government report, etc.), I group the public documents by their formatting requirements, as follows:

1. Included in both the bibliography and the footnotes

a) Book- or report-like

   i. Using the `(location: publisher, date)` construction

      **Turabian's subsection 17.9.3** Presidential publications (collected in book form—whole collection)

      **17.9.4** Publications of government departments and agencies (reports, bulletins, circulars from executive departments, bureaus, agencies)

      Use entrytype `@report` (or possibly `@book`, `@collection`, or `@proceedings`).[174]

   ii. Publishing data omitted or in free form

      **17.9.2** Congressional publications (Debates, reports and documents, Hearings)

      **17.9.4** Publications of government departments and agencies (reports, bulletins, circulars, study papers from federal commissions)

      **17.9.6** Treaties (published in collections)

Use `@legislation`, default subtype.

`@Legislation` will often require different author names in the footnotes and bibliography. Enter the full author name as it should appear in the bibliography in `author`, and the alternate form for the footnote in `shortauthor`. In the following example, "U. S. Congress. House. Committee on Christmas Trees" is entered (in curly brackets) in `author`, "House Committee on Christmas Trees" is entered in `shortauthor`[175]

Cite with the `\footcitecolon` command to replace the comma with a colon before the `postnote` argument, where required.[176]

b) Individual document in a book-like collection

   **17.9.3** Presidential publications (collected in book form—individual document)

Use `@incollection`, with "gov" as `entrysubtype`.[177]

c) Article-like

   i. Title in quotation marks

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174. U. S. Department of the Interior, Minerals Management Service, *An Oilspill Risk Analysis for the Central Gulf (April 1984) and the Western Gulf of Mexico (July 1984)*, by Robert P. LaBelle, open-file report, U. S. Geological Survey (Denver, 1984).

175. House Committee on Christmas Trees, *Joint Resolution Recognizing the Contributions of the Christmas Tree Industry to the United States Economy*, 110th Cong., 1st sess., Dec. 17, 2007, H. J. Res. 15.

176. Cong. Rec. 71st Cong., 2d sess., 1930, 72, Pt. 10: 10828-30.

177. *House Miscellaneous Document no. 210*, 53d Cong., 2d sess., in *Compilation of the Messages and Papers of the Presidents, 1789–1897*, ed. J. D. Richardson (Washington, DC: U. S. Government Printing Office, 1907), 4: 16.

**17.9.3** Presidential publications (proclamations, orders, vetoes, addresses, etc., in a journal-like publication such as the *Federal Register*)

**17.9.6** Treaties (published in series)

Use `@article` (leave `entrysubtype` empty). Titles will appear in quotation marks. Use `type` and `titleaddon` for proclamation numbers and other identifiers that go before and after the title, outside the quotes.[178]

ii. Title in italics

**17.9.2** Congressional publications (bills and resolutions)

Use `@article`, with "gov" as `entrysubtype`. Titles will be italicized. Use `type` and `titleaddon` for bill numbers and other identifiers that go in roman type, before and after the title.[179]

2. Footnotes only

a) Italicized titles

**17.9.2** Congressional publications (Statutes)

Use `@legal`. Titles will be italicized. Use `type` and `titleaddon` for bill numbers and other identifiers that go in roman type, before and after the title.[180]

b) Simplified, without italics or quotation marks

**17.9.5** U. S. Constitution

**17.9.7** Legal cases

Use `@jurisdiction`. Titles will appear in roman type, without quotation marks. `Type` is available, but should not be needed. Use `titleaddon` or `note` for identifying numbers and reporters. Give the abbreviated name of the court in `institution`.[181]

Placement of page numbers presents some difficulty, since they go before the court and the year, rather than at the end of the note. `Historian` places them properly when they are given in the `pages` field, but when they are in the `postnote` argument of the citation, they are printed at the end.

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178. President, Proclamation, "Carribean Basin Economic Recovery Act, Proclamation 5142, Amending Proclamation 5133," *Federal Register* 49, no. 2 (Jan. 4, 1984): 341.

179. *Food Security Act of 1985*, HR 2100, 99th Cong., 1st sess., *Congressional Record* 131, 132, daily ed. (Oct. 8, 1985): H 8461—specifying a page in the postnote, and using `\footcitecolon`.

180. *National Environmental Policy Act of 1969*, Public Law 91–190, §102, *U. S. Statutes at Large* vol. 83 (1970): 853, codified at U. S. Code 42 (2000), §4332.

181. United States v. Christmas, 222 F.3d 141, 145 (4h Cir. 2000).

Turabian calls for special short forms in repeated citations of certain public documents, avoiding ibids and cross-references to earlier notes. In `historian` the subtype "gov" of `@article` and `@incollection` and the types `@legal`, `@legislation` and `@jurisdiction` use these short forms.[182] Unfortunately it is not always clear from the Turabian manual how these short forms should be composed, especially when author and title may be missing, as in the citation from the *Congressional Record* (`historian` uses `shortjournal` and `note` in this case). In difficult cases, it might be best to override `historian`'s choices by supplying short forms in the `shortauthor`, `shorttitle`, or `label` fields, or by using `shorthand`s.

State and local government documents [17.9.8], Canadian government documents [17.9.9], British government documents [17.9.10], and publications of international bodies [17.9.11] fall into the same formatting categories as the American public documents.

Unpublished government documents should be treated as archival manuscripts (see 17.6.4, above).

Online government documents fall into the same groupings as above; just add the `url` and `urldate`.

# 18 Other Documents not Discussed in the Turabian Manual

## 18.1 Patents

Not covered by Turabian and not fully implemented here. Entries of type `@patent` will be handled by the `@legislation` routine. Put the patent number in the `note` field.[183]

## 18.2 Published Proceedings—From Turabian, 6th ed.

Turabian's 7th edition omits its earlier guidance on conference proceedings, but `historian` implements the following rules from the 6th edition.

### Proceedings with named author and editor

**Reference to entire volume of proceedings**  The entrytype `@collection` can be used here,[184] but `@proceedings` is preferable when additional information about

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182. House Committee on Christmas Trees, *Joint Resolution on the Christmas Tree Industry*; *Cong. Rec.*, 71st Cong., 2d sess., 72, Pt. 10; *House Misc. Doc. no. 210*; *Food Security Act of 1985*; *National Environmental Policy Act of 1969*; United States v. Christmas.

183. Orville Wright and Wilbur Wright, *Flying Machine*, U. S. patent no. 821,393, June 22, 1906.

184. Paul Harold Theerman and Karen Hunger Parshall, eds., *Experiencing Nature: Proceedings of a Conference in Honor of Allen G. Debus*, University of Western Ontario Series in Philosophy of Science 58 (Dordrecht and Boston: Kluwer Academic, 1997).

the conference or event (in `eventtitle`, `venue`, and `eventdate`) and sponsoring `organization` is to be given.[185]

**Reference to an individual paper in the volume of proceedings**   An example using `@inproceedings`, with the proceedings data in the same entry.[186] Crossreferencing from `@inproceedings` to `@proceedings` is also available and works as above, between `@incollection` and `@collection` (see 17.1.8).

**Proceedings published by an institution, association or the Like**   Enter the name of the institution or organization in the `editor` field and, to avoid redundancy, enter "corporate" in `editortype` to indicate the corporate editorship. The `organization` field will then be suppressed, as will the "ed." string. Example of a `@proceedings` with corporate editorship.[187] Example of an `@inproceedings` with corporate editorship.[188]

## 18.3  Manuals

Manuals are formatted just like books, but with additional fields for type, version, and organization.[189]

## 18.4  Miscellaneous

Entrytype `@misc` is available for any material that does not seem to fit anywhere else. Entries of this type are formatted like books with italicized titles.[190]

Alternatively, for cases that are hard to categorize, but for which the book-like formatting is inappropriate, use `@customd`. Titles will be printed in quotation marks and publishing information less structured than in `@misc`.

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185. Karl Sudhoff, ed., *Hundert Jahre Gesellschaft Deutscher Naturforscher und Ärzte*, German Society of Naturalists and Physicians, Hundredth Anniversary Meeting, Leipzig (Leipzig: F. C. W. Vogel, 1922).

186. Robert J. Richards, "The Theological Foundations of Darwin's Theory of Evolution," in *Experiencing Nature: Proceedings of a Conference in Honor of Allen G. Debus*, ed. Paul Theerman and Karen Parshall, University of Western Ontario Series in Philosophy of Science 58 (Dordrecht and Boston: Kluwer Academic, 1997).

187. German Society of Naturalists and Physicians, *Hundert Jahre Gesellschaft Deutscher Naturforscher und Ärzte*, Hundredth Anniversary Meeting, Leipzig (Leipzig: F. C. W. Vogel, 1922).

188. Karl Sudhoff, "Einleitung," in *Hundert Jahre Gesellschaft Deutscher Naturforscher und Ärzte*, Hundredth Anniversary Meeting, Leipzig, by the German Society of Naturalists and Physicians (Leipzig: F. C. W. Vogel, 1922).

189. Kate L. Turabian, *A Manual for Writers*, reference book, version 7 (Chicago and London: University of Chicago Press, 2007);  U. S. Gauges and Thermometers, *Conversion Factors*, Meriden Cooper Corporation (n.d.).

190. U. S. Gauges and Thermometers, *Conversion Factors*, Meriden Cooper Corporation (n.d.).

# 19 Formatting and Printing the Bibliography

## 19.1 List of Shorthands

Before the bibliography proper, the command `\printshorthands` can be used to print the list of shorthands, which have been used in these examples for many of the `@customa` and `@reference` entries, which normally are not cited directly, as well as for frequently cited collections.

## List of Abbreviations

| | |
|---|---|
| AdB | Bayerische Akademie der Wissenschaften. *Allgemeine deutsche Biographie.* 56 vols. Leipzig: Duncker & Humblot, 1875–1899. |
| Adelung's Dictionary | *Grammatisch-kritisches Wörterbuch der hochdeutschen Mundart: Mit beständiger Vergleichung der übrigen Mundarten, besonders aber der Oberdeutschen.* By Johann Christoph Adelung. 2nd ed. J. G. I. Breitkopf, 1793–1801. |
| DarLifeLet | Francis Darwin, editor. *The Life and Letters of Charles Darwin: Including an Autobiographical Chapter.* 2 vols. New York: D. Appleton & Co., 1898. |
| Darwin Correspondence | Frederick Burkhardt and Sydney Smith, editors. *The Correspondence of Charles Darwin.* Cambridge and New York: Cambridge University Press, 1985–. |
| Darwin-Online | The Complete Work of Charles Darwin Online. URL: http://darwin-online.org.uk/ (accessed 03/22/2009). |
| Goldschmidt Papers | Richard Benedict Goldschmidt Papers. University of California, Bancroft Library, Berkeley. |
| Grimm's Dictionary | *Deutsches Wörterbuch.* By Jacob Grimm et al. Leipzig: S. Hirzel, n.d. |
| HaeckItal | Ernst Haeckel. *Italienfahrt: Briefe an die Braut, 1859/1860.* With an introduction by Heinrich Schmidt. Leipzig: K. F. Koehler, 1921. |
| Haeckel Papers | Ernst Haeckel Papers. Ernst-Haeckel-Haus, Jena. |
| OoSfacs | Charles Darwin. *On the Origin of Species by Means of Natural Selection: Or the Preservation of Favored Races in the Struggle for Life.* London: John Murray, 1859. Reprint, Cambridge, MA and London: Harvard University Press, 1964. Facsimile of 1st edition. |

## 19.2 Lists of Archives, Reference Works, and Other Types and Subtypes

It is sometimes also desirable to make additional lists of some of the entrytypes and subtypes that Turabian normally omits from the main bibliography, for example, a list of archives or reference works.

First provide a formatted text for the heading, using the `\defbibheading` command of `biblatex`, e.g.,

```
\defbibheading{archives}{\subsubsection*{Archives and Manuscript Collections}}
```

Then the `\printbibliography` command, with the clauses `heading=archives` to generate the heading defined above, and `type=customa` to single out the archives. Result:

### Archives and Manuscript Collections

Bateson, William Papers. American Philosophical Society Library, History of Science Collection, Philadelphia. Microfilms. Film no. 26.

Boveri, Theodor Papers. Abteilung für Handschriften und seltene Drucke, Bayerische Staatsbibliothek, Munich.

Cold Spring Harbor Eugenics Archive. Online document collection.

Goldschmidt, Richard Benedict Papers. University of California, Bancroft Library, Berkeley.

Haeckel, Ernst Papers. Ernst-Haeckel-Haus, Jena.

Kammerer, Paul Papers. American Philosophical Society Library, Philadelphia. BK128.

Weismann, August Papers. Universitätsbibliothek Freiburg, Freiburg im Breisgau.

Similarly for a list of reference works, use:

```
\defbibheading{references}{\subsubsection*{Reference Books}}
\printbibliography[heading=references,type=reference]
```

### Reference Books

*Brockhaus Enzyklopädie.* 17th ed. Wiesbaden: F. A. Brockhaus, 1967.

*Deutsches Wörterbuch.* By Jacob Grimm et al. Leipzig: S. Hirzel, n.d.

*Dictionary of Scientific Biography.* New York: Charles Scribner's Sons, 1970.

*Grammatisch-kritisches Wörterbuch der hochdeutschen Mundart: Mit beständiger Vergleichung der übrigen Mundarten, besonders aber der Oberdeutschen.* By Johann Christoph Adelung. 2nd ed. J. G. I. Breitkopf, 1793–1801.

*New Dictionary of Scientific Biography.* Edited by Noretta Koertge. Detroit: Charles Scribner's Sons and Gale/Cengage Learning, 2008.

For ease in sorting out some of the entrysubtypes, `historian` puts them automatically into the categories "innewspaper," "inmagazine," "newspaper," "magazine," "biblical," "classic," and "canonical." These can be printed separately using commands such as the following:

```
\defbibheading{magazine}{\subsubsection*{Magazine Literature}}
\printbibliography[heading=magazine,category=inmagazine]
```

### Magazine Literature

*New Yorker.* Talk of the Town, April 10, 2000.

Sokal, Alan D. "A Physicist Experiments with Cultural Studies." *Lingua Franca,* May/June 1996, 62–64.

[Waddington, C. H.?]. "Individual Paradigms and Population Paradigms." Review of *The Case of the Midwife Toad*, by Arthur Koestler. *Times Literary Supplement*, October 22, 1971, 1309–1310.

Wallraff, Barbara. World Court. *Atlantic Monthly*, June 2005, 128.

## 19.3 Main Bibliography

Now comes the main part of the bibliography, which omits references of entrytype `@customd`, `@reference`, `@inreference`, `@legal`, and `@jurisdiction`, as well as entrysubtypes "classic" and "newspaper", which `historian` places in the category noteonly. Use the following command to print the bibliography without references from that category: `\printbibliography[notcategory=noteonly]`

To exclude, e. g., archives, if they have been listed separately, use a clause such as: `\printbibliography[notcategory=noteonly, nottype=customa]`

In the following bibliography, everything is included except the noteonly category.

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———. *Charles Darwin: The Power of Place.* [Downe?], 2003. Location uncertain, publisher empty.

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# 20 Revision history

### 0.4    2010-08-22

Updated and tested for compatibility with version 0.9b of `biblatex`

`Historian` now requires its own localization file `historian.lbx`, which is declared as an "american" language alias.

Revised and expanded `reprint` options for printing the `orig-`fields of translations. Keys have been renamed, and bibstrings modified, too. . . .

The bibliography category "footnoteonly" has been renamed "noteonly"

New option `shortincoll` abbreviates cross-referenced `@book`/`@collection`/`@reference` data in the bibliography.

Revised implementation of `@periodical` and special issues of journals, including new usage of `title` and corrected placement of editors.

Revised formatting of specific volumes of multivolume works, for better conformity with Turabian guidelines. . . . . . . . . . . . . . . . . . . . . . . . . . .

Various corrections of spacing and punctuation, use of eventdate, formatting of multivolume `@inbook`s, numbers of books in a series.

Internal reorganization of some of the bibliography drivers and subroutines, most extensively for `@collection`/`@incollection`, `@book`/`@inbook` and `@reference`/`@inreference`.

Authors and editors are now printed firstname first in the List of Shorthands.

Revised handling of page numbers in the `postnote` argument of `@article`, adopting the new `citepages` option from the verbose styles. . . .

New cite commands `\footciteurllast` and `\citeurllast` that will move online locators to the end of the note, i. e., after `postnote`. . . . . . . . . . . .

Improved implementation of the new date and printdate features of `biblatex` v. 0.9.

Use of keys to bibstrings for generating standard types of `@thesis`. . . . . .

Revised handling of `shorttitle`s in `@legislation`. . . . . . . . . . . . . .

Revised treatment of missing locations and publishers: "n.p." no longer generated automatically. . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . .

Provisional implementation of `@patent` as an alias for `@legislation`. . . .

Changed input encoding to utf8 in the documentation file `historian.tex` and in sample preamble. . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . .

Review and correction of documentation and example library.

### 0.3a   2010-05-20

Fixed internal problem with ifthen in `@article`.

### 0.3   2010-04-21

`Printnoterefs` option fixed.

Various internal changes for compatibility with versions 0.9 and 0.9a of `biblatex`.

Publication dates have been moved from `year` to `date` in all the examples, but `year` can still be used, and is especially useful for uncertain dates that include non-numeric characters such as or "n.d.," or "ca. 1900."

The fieldpubstate has been implemented as a fallback for the publication date, in case there is no `date` or `year`. Use it for non-numeric dates or texts such as "forthcoming" or predifined keys such as "inpress."

Original publication dates of reprints have been moved from `origyear` to `origdate`

`Printurls` option has been replaced by the `url`, `doi`, and `eprint` options as defined in the standard style. In `historian`, these options may also be used on a per-entry basis. . . . . . . . . . . . . . . . . . . . . . . . . . . . . . .   .

`@customd` is now defined as the fallback entrytype.

`Eventdate` is now used in `@proceedings`, `@inproceedings`, and `@audio`.

`@bookinbook` supported, but not distinguished from `entrysubtype` "volume" of
`@inbook`.

New handling of edited volumes within edited multivolume collections takes
advantage of the editora/b/c fields.

The `printnoterefs` option is also available as an entry-option.

Short form for repeated citations of `@letter`s now includes the date.

`@performance` uses `origtitle` and `origdate` for the case of re-broadcasts of
television shows.

`@proceedings` and `@inproceedings` now include the `eventtitle` and `eventdate`
fields.

### 0.2a   2009-08-17

Internal changes for better conformity with version 0.8i of `biblatex`. (Note,
however, that the switch has not been made from the old "editor" macros to
the new "editor+others" macros that were introduced in `biblatex` 0.8e and
that concatenate more of the editorial roles. Turabian does not require so many
editorial roles to be detailed in this way.)

Added cite command `\citeannote` for printing `annotation`.

Added an `annotation` option for making annotated bibliographies.

Added the option to suppress cross-referencing to the note number of the first
instance of a repeated citation, using `printnoterefs=false`

Corrected error in positioning of `editor` in `@periodical`

Corrected error in printing of `note` in `@legal`

Corrected error in printing of name-dashes for bibliography entries sorted by
translator in the absence of an author or editor.

Corrected several errors in spacing and punctuation.

Eliminated dependence on `verbose-inote`.

### 0.2   Skipped

The cbx file of v. 0.1 was inadvertently given this number.

### 0.1   2009-05-19

Initial public release, for use with version 0.8c of `biblatex`