The Chicago authordate-trad Specification: Testing Only

Please see cms-dates-intro.pdf first

Starting with biblatex version 1.5, in order to adhere to the author-date specification you will need to use Biber to process your .bib files, as \LaTeX{} (and its more recent variants) will no longer provide all the features the style requires. For this release, you really need the current versions of Biber (2.10) and biblatex (3.10), which contain features and bug-fixes on which my own code relies. The advice that follows in this document assumes that you are using Biber; if you wish to continue using \LaTeX{} then you need biblatex version 1.4c and biblatex-chicago 0.9.7a. (Please contact me at the email address in biblatex-chicago.pdf if you have any difficulty obtaining a copy of this earlier release.)

Editions

This file documents the authordate-trad specification which, as envisaged by the Manual (2010, 15.45), grafts the traditional Chicago author-date title formatting onto the current, 16th-edition recommendations for the remainder of the reference apparatus. This newest edition implemented significant changes to what the author-date specification has, historically, recommended, and there are certain to be users who prefer the older format with titles capitalized sentence-style and not, in the case of most un-book-like entries, enclosed in quotation marks. I have implemented the authordate-trad style for such users. To compare it with the standard style, please see cms-dates-sample.pdf. You can also still use the 15th-edition styles from biblatex-chicago, which have been updated with some improvements borrowed from the 16th edition, but which are now strongly deprecated. (See biblatex-chicago15.pdf and cms15-dates-sample.pdf.) I would encourage all users to switch to one of the 16th-edition styles as soon as possible, as I am concentrating all of my development time there.

Usage

As a general rule, you’ll probably want to use the \texttt{\autocite} command for most citations. For most sources, the result will be exactly as you expect it to be. A few examples: (Adorno and Benjamin 1999); (Ashbrook and Albright 1997); (Babb 1989); (Barcott 2000). Any page references should also appear as you expect: (Batson 1990, 338); (Beattie 1974, 79); (Boxer 1953, 36).

Repeated citations

Repeated citations are somewhat complicated. The Chicago author-date style doesn’t use “ibid,” but in general a repeated citation on the same page will print only the page reference: (Browning 1996); (45). Technically, this should only occur when a source is cited “more than once in one paragraph” (CMS 2010, 15.26), so you can use the \texttt{\citereset} command from biblatex to achieve the greatest compliance, as the package only offers automatic resetting on part, chapter, section, and subsection boundaries, while biblatex-chicago automatically resets the tracker at page breaks:

\texttt{\citereset (CMS 2010, 15.27).} If you are going to repeat a source, make sure that the cite command provides a postnote — when using biblatex-chicago you’ll no longer get any annoying empty parentheses, but you will get another standard citation, which may add too much clutter: (CMS 2010). If you don’t need to cite a specific page, then it may be better, or at least more concise, only to use one citation command rather than two.
Other citation commands

The other citation commands from biblatex also work fine:
\textcite: Conley (1999); \autocite: (1982); \cite: Conway 1998; \cite*: 2001; \footnote with \autocite; \footcite (\textcite inside a \footnote).

Multicites should work as you expect, too:
\autocites: (Electronic Book Technology Inc. 1991; Eliot 1953); \autocites by the same author: (Pirumova 1977a, 1977b); \autocites by the same author with postnotes: (Pirumova 1977a; 1977b, 14); \textcites by the same author with postnotes: Pirumova (1977a, 37; 1977b).

Shorthands

Chicago’s author-date style only seems to recommend the use of shorthands as abbreviations for long authors’ names, particularly institutional names (CMS 2010, 15.36). By default, I have followed this recommendation: \autocites: (BSI 1985; ISO 2001); \textcites: BSI (1985) and ISO (2001). This shorthand will by default appear at the head of the entry in the list of references, followed by the parenthesized expansion of the shorthand, taken from the author field. (This is a change from the 15th edition.) You will usually also need a sortkey field to make sure that the entry is alphabetized by the shorthand rather than by the title. If you use a \printshorthands command, the list of shorthands will still be printed, so you now have a variety of options available for presenting the expansions depending on your specific requirements. Please note, also, that you can get back something approaching the “standard” behavior of shorthands if you give the cmslos=false option to biblatex-chicago in your document preamble.

Mildly problematic entries

In most entries, the absence of an author can be supplied by, e.g., an editor or a translator: (Crow and Olson 1966); (Silverstein 1974). Sometimes an anonymous work’s author is known or can be guessed: ([Horsley] 1796); ([Cook?] 1730). Alternatively, in some cases the title may appear in place of the author: (Stanze 1547); (True and sincere declaration 1610). The 16th edition is less than enthusiastic about the use of “Anon.” as author.

By default, in most entry types, an absent date will automatically provoke Biber into searching for other sorts of dates in the entry, in the order year, eventyear, origyear, urlyear: e.g., (Evans-ton Public Library 2002), which only has a urlyear. In three entry types — Music, Review, and Video — this search order is eventyear, origyear, year, urlyear, as in these types the earliest year should take precedence (cf. page 5, below). Beginning with this release, you can change the default search order, for all but the three types just mentioned, by using the cmsdate option in the preamble of your document, instead of (or in addition to) using it in the options field of individual entries. Setting that option in the preamble either to “both” or “on” makes the document-wide search order: origyear, year, eventyear, urlyear. This may be useful for documents that contain many entries with multiple dates, and where you want always to present the earlier (i.e., orig) dates at the head of reference list entries and in citations. You can eliminate some of these dates from the running, or change the search order, using the DeclareLabeldate command in your preamble, but please be aware that I have hard-coded the possibilities above into the author-date style in order to cope with some tricky corners of the specification. If you reorder these dates, and your references enter these tricky corners,

1. (Donne 1995).
2. Dunn 1999.
the results might be surprising. (Cf. section 4.5.8 in biblatex.pdf and especially section 5.2, s.v. “date” in biblatex-chicago.pdf for the gory details.)

In most entry types, the absence of all four possible dates will automatically produce “n.d.” instead: (Bernstein, n.d.). You can also give it yourself in the form \bibstring{nodate}: (Ross, n.d.). A date that can be guessed should appear within square brackets: (Clark [1957?]). Forthcoming works are straightforward, assuming you remember to use the \autocap macro and the year (instead of the date) field, so that the word appears correctly in both citations and the list of references: (Author, forthcoming); (Contributor, forthcoming).

The 16th edition of the Manual has changed the rules for entries with more than one date (CMS 2010, 15.38). First, Music, Review, and Video entries have their own rules, which are applied automatically. (Once again, see page 5, below.) For other entry types, there are two options, corresponding to two different states of the \cmsgdate entry (or preamble) option. The default is \cmsgdate=off: (Maitland 1926). Here, setting the pubstate field to reprint ensures that a notice of the original publication date will be printed at the end of the reference list entry. Alternatively, you can use \cmsgdate=both: (Emerson [1836] 1985); (Maitland [1898] 1998). \cmsgdate=new and \cmsgdate=old are both now synonyms of both, while \cmsgdate=on is still available even though it falls outside the specification: (James 1909). These options, in combination with others available in your .bib files, can cover a wide range of difficult cases. Please see the next section below, the documentation in biblatex-chicago.pdf, particularly in section 5.2, s.v. “date,” and also the following entries in dates-test.bib: (Schweitzer [1911] 1966; E. B. White 1946a, 1946b).

**Corners of the specification**

In some cases, the Manual isn’t altogether clear about how to present entries in the author-date style. I’m pretty certain about most of what follows, but if you interpret the specification differently please let me know.

**InReference entries**

These present several peculiarities: the title of the work should always take the place of any author, no “n.d.” will automatically be provided, and any postnote field will be enclosed in quotation marks preceded by “s.v.” for “sub verbo.” This allows you to refer to alphabetized articles in well-known reference works: (Ency. Brit., 15th ed., s.v. “Hume, David”); (New Grove dict. 2002, s.v. “Sibelius, Jean”); (Wikipedia 2012, s.v. “BibTeX”).

**Author-less Article, Review, and Manual entries**

In Article and Review entries with the magazine entrysubtype, the absence of an author automatically places the journaltitle of the periodical in citations and at the head of the entry in the list of references: (Gourmet 2000). (Without the entrysubtype, you’ll get the title at the head rather than the journaltitle.) You can cite newspaper and magazine articles entirely within the text, i.e., without them appearing in the reference list (CMS 2010, 15.47), if you set the \cmsgdate=full entry option: (Lake Forester, March 23, 2000); (New York Times, April 10, 2000). In Manual entries, the organization field does the same: (Electronic Book Technology Inc. 1991). If you wish to present an abbreviated form of the journal (or organization) name only in citations, then the shortauthor field — or in other cases the shorthand field — is the place for it, making sure to include formatting: (Ergänzungsblätter z. Allg. Lit.-Ztg. 1828); (BSI 1985).
Misc entries with an entrysubtype

When citing individual letter-like pieces from an unpublished archive where only an orig-
date is present, you no longer need to set the cmsdate option in your .bib entry, as Biber
and biblatex-chicago now handle this automatically: (Creel 1918). Non-letters, e.g., interviews, use
the date field, so you don’t need cmsdate there, either: (Spock 1974). For undated pieces you
can put \bibstring{nodate} in the year field: (Dinkel, n.d.). For citing whole collections,
see the next section.

**entrysubtype = {classical}**

This option’s name derives from its use for citing texts from classical antiquity, though in the
author-date style especially it can be put to use in several other contexts. In a nutshell, any
entry with such an entrysubtype will be treated, in citations only, not as author-date but as
author-title. (Entries in the list of references, e.g., a particular edition of Aristotle, will still
appear in standard author-date format.) A \cite* or \autocite* command will, in such a
case, produce the title rather than the year. Some examples should make this clearer:

Classical works: without abbreviation: (Aristotle *Metaphysica*); with abbreviation: (Aristotle
*Metaph.*); (Pl. *Resp.*); using standard pagination: (*Metaph.* 3.2.996b5–8); (*Resp.* 420e); work cited
by page of a modern edition, i.e., without entrysubtype: (Euripides 1958, 198).

Sacred works, e.g., the Bible and the Qur’an: (Gen. 25:19–36:43).

An unpublished archive, from which more than one work has been cited: (House Papers, file
12). (Both this and the previous example use a Misc entry with classical entrysubtype.)

Comments inside citations

If you wish to include a comment inside the parentheses of a citation, it will need to be sepa-
rated by a semicolon (CMS 2010, 15.23). If you have a postnote, then you can manually provide
the punctuation and comment in that field, e.g., (Stendhal 1925, 4; the unrevised trans.). With-
out a postnote, you now have two choices. You can enable the new postnotepunct package
option, which allows you simply to type \autocite[; the unrevised trans.]{stendhal: parma} (Stendhal 1925; the unrevised trans.), or you can continue to use a separate Misc
or CustomC entry containing just the text of the comment in the title field, entrysubtype
classical, and options skipbib. An \autocites command calling both the main text and
the comment will then do the trick, e.g., (CMS 2010; the most recent edition).

Multiple authors

The default settings in biblatex-chicago are maxnames=3, minnames=1 in citations and max-
bibnames=10, minbibnames=7 in the list of references (these latter parameters set in biblatex-
chicago.sty). In practice, this means that an entry like hlatky:hrt, with 5 authors, will present
all of them in the list of references but will truncate to one in citations, like so: (Hlatky
et al. 2002). For the vast majority of circumstances, these settings are exactly right for the
Chicago author-date specification. However, if “a reference list includes another work of the
same date that would also be abbreviated as [‘Hlatky et al.’] but whose coauthors are different
persons or listed in a different order, the text citations must distinguish between them” (CMS
2010, 15.28). The (Biber-only) biblatex option uniquelist, set for you in biblatex-chicago.sty,
will automatically handle many of these situations for you, but it is as well to understand that
it does so by temporarily suspending the limits, listed above, on how many names to print
in a citation. Without uniquelist, biblatex would present such a work as, e.g., (Hlatky et al.
2002b), while hlatky:hrt would be (Hlatky et al. 2002a). This does distinguish between them,
but inaccurately, as it suggests that the two different author lists are exactly the same. With uniquelist, the two citations might look like (Hlatky, Boothroyd et al. 2002) and (Hlatky, Smith et al. 2002), which is what the specification requires.

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

**Audiovisual entries**

According to the Manual, “Chicago recommends a more comprehensive approach to dating audiovisual materials than in previous editions.” This means, for instance, that, even when consulting a digital copy, “it is generally useful to give information about the original source.” Also, “the date of the original recording should be privileged in the citation” (CMS 2010, 15.53). The rather more book-like entries are generally unaffected by these changes, so published (Audio) and unpublished (Misc) scores are no problem at all: (Schubert 1895); (Verdi 1998); (Shapey 1966). The dating of online materials has been enhanced: (Coolidge [1920?]); (Horowitz 1968); (Pollan 2007). The most significant changes, however, appear in Music and Video entries, where every effort should be made to find date(s) for sources: (Auden 1991); (Curtis and Malins 1996); (Handel 1987); (Holiday 1958); (New York Trumpet Ensemble 1981). Others perhaps require further information in the entry or genuinely are better suited to presentation in running text: (Beethoven, n.d.). The standard biblatex tools for subdividing reference lists are all available if you want to follow the Manual’s recommendations on presenting this kind of material separately from other sources.

**Further examples (mainly for testing purposes)**

Article: (Associated Press 2000); (Brown 1978); (Chu Ching and Zhi 1983); (Conley 1999); (Connell and Airey 1982); (Ellis 2008); (Friedman and Mezzetti 2001); (Garaud 1967); (Garrett 1975); (Gibbard 1999); (Kern 1938); (Kim Luu 1999); (Lewis 1998); (Loften 1989); (Loomis 1960); (Morgenson 2000); (Osborne 2000); (Reaves 2001); (Rozner 1979); (Schellinger, Hudson, and Rijsberman 1998); (Suangtho and Lauridson 1990); (Thompson 1964); (Tillich, 1951–63); (Austin 1999); (Turabian 1996); (Walker and Taylor 1998); (Weber, Burlet, and Abel 1928); (Wereszyczycki 1977); (E. B. White 1976); (Wright 1968–78); (Wright 1969).

Audio: (Leonardo 1480s).

Book: (Barrows 1959); (Churchill and Eisenhower 1990); (Cohen 1999); (Cotton Manufac. 1869); (Creasey 1977); (Creasey 1978); (Creasey 1966); (Davenport and Beck 2001); (Feydeau 1970); (Furet 1999); (Furet 1995); (Hopp 1977); (Howell 1998); (Lach 1977); (Le Carré 1982); (Lévi-Strauss 1962); (Lynch and Horton 1999); (Maisonuneuve, Lamarche, and St-Amand 1998); (McHugh 1980); (Menchú 1999); (Meredith 1970); (Michelangelo 1999); (Gibaldi 1998); (National Reconnaissance Office 1967); (Palmatary 1950); (Pelikan 1971); (Rodman 1997); (Schellinger, Hudson, and Rijsberman 1998); (Secher et al. 1996); (Sereny 1999); (Soltes 1999); (Stendhal 1925); (Sungtho and Lauridson 1990); (Thompson 1964); (Tillich, 1951–63); (Austin 1999); (Turabian 1996); (Walker and Taylor 1998); (Wauchope 1950); (Weber, Burlet, and Abel 1928); (Wereszyczycki 1977); (E. B. White 1976); (Wright 1968–78); (Wright 1969).

BookInBook: (Bernhard 1990b); (Bernhard 1990c).

Collection: (Brush and Clark 1983); (Harley and Woodward 1994); (Harley and Woodward 1987); (Kamran and Day 1980); (Angle 1968); (Zukowsky 1987).
References


Ashe, Gordon. See Creasey, John.


Author, Margaret M. Forthcoming. Article title. Journal Name 98.


[Cook, Ebenezer?]. 1730. *Sotweed redivirus, or the planter’s looking-glass.* By “E. C. Gent.” Annapolis.

Cotton Manufacturer. 1869. An inquiry into the causes of the present long-continued depression in the cotton trade, with suggestions for its improvement. Bury, UK.


Morton, Anthony. *See Creasey, John.*


*Stanze in lode della donna brutta.* 1547. Florence.


Thompson, E. P. 1964. *The making of the English working class.* New York: Pantheon. (Published in UK in 1963.)


*A true and sincere declaration of the purpose and ends of the plantation begun in Virginia, of the degrees which it hath received, and means by which it hath been advanced.* 1610. London.


York, Jeremy. See Creasey, John.