

Chicago Manual of Style Online (CMOS)

URL: <https://www.chicagomanualofstyle.org/home.html>

Publisher: University of Chicago Press, <https://www.press.uchicago.edu/index.html>

Primary Subject: Multidisciplinary (or interdisciplinary)

Secondary Subject(s): Humanities

Review Type: Bibliographic tool, Website

Access: Subscription

Composite Score: 3.75

Reviewed by: Kyle D. Winward, Central College

Review DOI: 10.5260/CCA.199547

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Abstract

The Chicago Manual of Style (CMOS) is one of the most widely adopted writing and citation style manuals in North America. It is used by a variety of organizations including high schools, academic institutions, and trade presses. *CMOS Online* (CMOSO) includes the full content of the current edition print manual, the full contents of the immediate previous edition, plus a users' forum. It is available via annual subscription; there are a variety of subscription types: for individuals, small groups, and a diversity of sizes and types of organizations. Each type of subscription has benefits for its respective user base, such as My Manual (bookmarks, personalized notes, and stylesheets) for individual and group subscribers. CMOSO has an intuitive interface that functions seamlessly on multiple devices.

Overview

As a writing and citation guide CMOS is widely adopted by North American educational institutions and scholarly publishers, especially those with a humanities focus. A new edition is published every 7 to 10 years. Upon publication of a new edition, the previous edition will continue to be available online (Keene, Lauren, email to author, August 2, 2018).

The beginnings of the CMOS can be traced back to the late 19th century at the University of Chicago Press, when compositors began to compile a style sheet of rules for its proofreaders. In 1906, the pamphlet evolved into the first book format style manual; in 2006, the first online manual was produced. An advisory board of publishing professionals and academic scholars was first formed in 2003; since then the CMOS editorial staff has solicited advice from the advisory board and users of the manual for subsequent editions of CMOS ("About the CMOS," 2017).

CMOSO contents are identical to those in the current print manual (17th ed., 2017) and divided into three major sections: I. The Publishing Process, II. Style and Use, and III. Source Citations and Usage. Sections are further divided into parts and paragraphs (e.g., 1.1 Scholarly Publishing, 1.2. Publication Format, etc.). The third division was previously named Documentation (What's New in the 17th Edition, 2017); according to M.F. Jones, "The section on the publishing process now better addresses issues of electronic publishing such as metadata, DOIs, and format types, and legal issues of copyright and open access" (2018). The section title change from the previous Documentation to Source Citations and Usage "exemplifies

editorial changes to headings and text for improved keyword searching online” (Jones, 2018). The CMOS Editorial Policy states that while the current edition is in effect, “... no changes in styles or rules will be made to the current edition, either in print or online” (2017). Any typographical errors that are found “will be corrected as soon as possible on the online edition” and will also be corrected in subsequent print impressions (Editorial Policy, 2017).

CMOSO is web-based and does not require installation or special software; however, as addressed later in the authentication section of this review, JavaScript and cookies must be enabled for users to access secure content. Windows 7 or Mac OS 10.6 or higher are recommended for desktop and laptop compatibility. Apple iOS 6 or Android OS 4 or higher are recommended for mobile devices. All major browsers are supported (Recommended Browsers, 2017).

User Interface

The CMOSO portal includes box-style menu links to the following: CMOS Contents, Citation Quick Guide, Chicago Style Q&A, Shop Talk Blog, Subscribe or Free Trial, Users Forum, Video Tutorials, Librarian, Teacher & Student Resources, and the CMOS Store. Except for CMOS Contents and Users Forum, all sections are available to non-subscribers. The top banner menu also includes a link to the 16th edition contents. Citation Quick Guides provide summaries and examples of the two systems of Chicago citation style: notes and bibliography (primarily humanities), and author-date (primarily sciences and social sciences). The Chicago Style Q&A section includes a monthly compilation of user questions with respec-

tive answers from the editorial staff. There is also an alphabetical list of Q&A topics, and areas for CMOS users to submit questions and sign up for monthly e-mail alerts (of new Q&A topics). The Shop Talk Blog includes posts about the CMOS editorial process and CMOS-related publications, Chicago Style Workouts (CMOS-based true/false self-quizzes), and a section for students that includes paper formatting tips (a notable feature for educational institutions).

The top banner includes three methods for retrieving CMOS contents: an index, “Go to [paragraph]” box, and a keyword search box. The index is identical to the print index, and has hyperlinks to referred pages, paragraphs, and tables. Users can enter a known paragraph number into the “Go to [paragraph]” area and retrieve the contents of that paragraph. Keyword searches present tabbed results from relevant sections (see figure 1); hits from the subscriber-only sections will prompt for a user name and password. As a user begins to type in a search term, alphabetical suggestions will appear in the search pull-down window; it may not be apparent to users that it is necessary to press enter or specifically click on the magnifying glass to submit their search. Searchers can ignore the suggested terms and type in their own terms. Searches retrieve all-tense and all-case variations of terms. Stop words, including articles and conjunctions, are also searchable. Phrase searching is supported by enclosing terms in quotation marks (Search Tips).

The table of contents is easy to navigate with large directional arrows allow browsing of previous and subsequent paragraphs; font sizes are large. Paragraphs may be emailed or saved as HTML files to a device. The My Manual feature is included for sub-

At A Glance

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Review Type	Bibliographic tool, Website
Audience level	General public, Undergraduate, Graduate/Faculty/Researcher
Access	Subscription
Composite Score	3.75

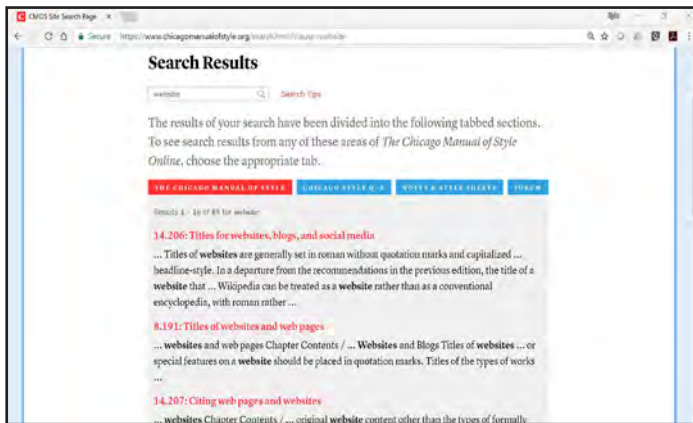


Figure 1: CMOSO Search Results

scribers with user name and password access (individual and small group subscriptions). My Manual allows users to bookmark and/or add notes to CMOS paragraph pages (see figure 2). Bookmarks and notes made on the 16th edition can be moved to the 17th edition. Additionally, individual and group users can add their own style sheets, which can include excerpts copied from the CMOS, live links to relevant pages, or user-created material (My Manual, 2017).

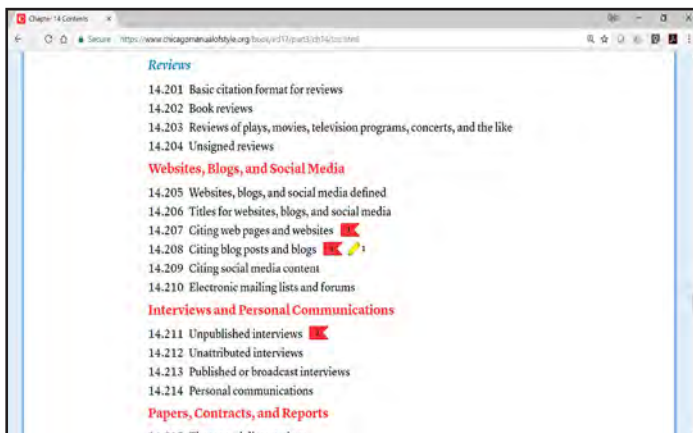


Figure 2: CMOSO My Manual Example with Notes and Bookmarks

As with My Manual, the Users Forum is also only available to individual and group subscribers (Users Forum Help, 2017). The forum is built with MyBB forum software and looks slightly different than the CMOSO contents and help pages (see figure 3). A user might assume that the forum's top banner keyword search box will retrieve only forum searches, but the search box functions the same as it does in other areas of the CMOSO (i.e., it retrieves searches from all sections of the website).

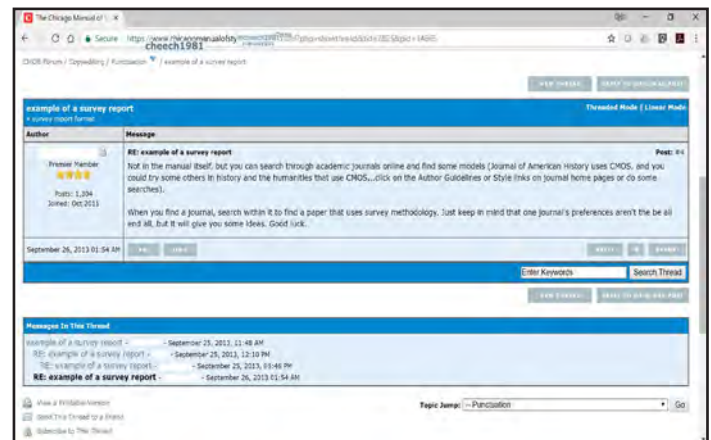


Figure 3: CMOSO Users Forum

CMOSO “supports with exceptions” all the applicable sections of the Voluntary Product Evaluation Template (VPAT), which includes 1194.22 “Web-based internet information and applications,” 1194.31 “Functional performance criteria,” and 1194.41 “Information, documentation, and support” (Keene, Lauren, e-mail message attachment to author, August 2, 2018).

Critical Evaluation

During the reviewer’s trial access to the resource, CMOSO was consistently available, and page loading and search response time was consistently quick. The layout of the website, especially the portal-type menu arrangement of the home page, is very intuitive. The page font sizes are large and clear, although the search boxes are relatively small (less so on a mobile interface), and as noted in the navigation of this review, it may not be immediately obvious to users that it is necessary to press enter or click on the magnifying glass icon to activate searches.

As previously mentioned, My Manual capabilities (bookmarks, personalized notes, and style sheets) as well as Users Forum registration is only available to individual and group users. The lack of My Manual and Users Forum registration availability may be of concern to potential corporate and other institutional subscribers. CMOSO developers have considered extending the My Manual option to institutional subscribers but also have concerns about ongoing costs being passed on to all subscribers (Keene, Lauren, e-mail message to author, August 2, 2018).

To obtain perspective from a subscribing institution, the reviewer emailed Lorraine Pellack, head of research services Parks Library at Iowa State University's (ISU) for general feedback about CMOSO (July 9, August 13–15, 2018). Pellack responded that CMOSO is a relatively new resource for ISU (purchased spring 2018); they have not received many user questions. Pellack added that she could see why My Manual is a desired feature for frequent users of CMOSO, but that she did not see it as a necessary option for more occasional or ready reference usage. Pellack also added that ISU library staff have received “push-back from researchers that so many [products] request users register,” and that some library users have expressed confusion and/or concern about prompts and the need for user name and password (beyond logging on to the ISU campus network) (Pellack, Lorraine e-mail message to author, August 14, 2018). Pellack added that CMOSO is a helpful resource for ISU's distance education students—those who lack access to the print manual.

The CMOS website benefits from wide-ranging documentation, both for end users and site administrators. As previously mentioned, details about CMOSO subscription types, tier structure, and even pricing are freely available via the website.

Competitive Products

Because CMOS (print and online) is the only fully authoritative and complete version of Chicago style, it doesn't have a direct competitor. As previously mentioned, the CMOS notes and bibliography style has wide adoption in the humanities. As the CMOS author-date style is more frequently used in the sciences and social sciences, it is appropriate to compare CMOSO to the American Psychological Association (APA) style equivalent *APA Central* (<https://www.apastyle.org/products/asc-landing-page>), which like CMOSO is web-based and includes the full contents of the latest style manual—in this case *The Publication Manual of the APA*. Unlike CMOSO, *APA Central* includes a bibliographic citation generator; refer-

ences can be exported in RIS format and uploaded in reference manager applications such as EndNote, RefWorks, Zotero, etc. It also includes additional full text reference books and uses the LTI standard, which allows for learning components integration into Blackboard, Moodle, and other LMS interfaces (Macwatters, 2017). Perhaps partly due to its more extensive product offerings, the site-wide subscription fee range for *APA Central* is markedly higher for academic institutions (Macwatters, 2017) than that for CMOSO.

One of the few widely adopted free online resources that can be compared to CMOS (and APA and MLA style manuals) is Purdue University's *Online Writing Lab* (OWL, <https://owl.purdue.edu/>). However, the Chicago Style section of OWL “...provides basic information regarding the formatting of entries used in the bibliography,” and for further content specifics, it is recommended to refer to appropriate sections of the CMOS (*Online Writing Lab*, 2018).

Again, CMOSO does not include a citation generator (or a style checker), nor are there any plans to include either (Frequently Asked Questions, 2017). However, as previously mentioned, documenting sources is only one of the three major topical sections of the CMOS; at the equivalent of 1,144 pages, CMOSO offers more comprehensive and authoritative writing and publication guidelines than any currently available reference management (free and/or subscription) resource that supports Chicago Manual of Style format.

Organizations not able to afford CMOSO could purchase the 17th edition print manual instead (listed at \$70). Another potential print alternative or supplement for schools and undergraduate institutions is Kate Turabian's *Manual for Writers of Research Papers, Theses, and Dissertations*, 9th ed. (also published by the University of Chicago Press). The Turabian work is an official but condensed version of the CMOS, which is written for (non-graduate) student writers. The listed price for the Turabian Manual is half the cost or less of the CMOS print manual (*Online Writing Lab*, 2018).

Purchase Contract

There are no provisions for archive access or interlibrary loan. There are no limits on the number of simultaneous users for institutional subscriptions. A report portal is available for institutional administrators: "... usage statistics reports display a cumulative, monthly count of "page views," which is the total number of pages viewed. Repeated views of a single page are counted. *CMOS Online* usage statistics have not been audited by COUNTER therefore cannot be considered COUNTER-compliant. (Keene, Lauren, e-mail message to author, August 2, 2018). "Institutional subscribers to the CMOS must sign a licensing agreement with the University of Chicago Press" (Terms and Conditions—Institutions, 2011). Additional terms and conditions for institutional, as well as individual and group subscribers, are available at <https://www.chicagomanualofstyle.org/help-tools/Terms-of-Use>.

Pricing

The Chicago Manual of Style Online (CMOSO) is available by subscription for individuals, small groups (2 to 50 individuals), corporations, and academic and other institutions. All subscription categories include access to the full text contents of the 16th and 17th editions of work. Individuals can opt for two- or three-year period subscriptions, with corresponding discounts per period. There are also significant discounts available on the online and print manual bundle to new individual subscribers. Group pricing is based on number of individuals. Site licenses are available to corporation organizations and academic and other institutions. Corporate subscriptions are available to businesses with more than 50 users; pricing is tiered and based on full-time equivalents. At the time of this writing, annual rates ranged from \$1,600 to \$3,300. Academic institution tiered pricing structure is "based on the Carnegie Classification System whenever possible" (Subscription Options, 2017). Annual subscription rates currently range from \$265 for "very small" (including community colleges) to \$1,700 "very large." Consortial pricing is available, as well as 30-day trial subscriptions. Subscription types

and pricing details are openly available via the CMOS home page or directly at <http://www.chicagomanualofstyle.org/help-tools/subscription.html>.

Authentication

As previously mentioned, user name/password arrangement is available for individual and group subscriptions. IP authentication is available for institutional and corporate site-wide licenses; institutions may make their own arrangements for EZProxy, Shibboleth, or LDAP system integration (CMOS Questions). The authentication service uses SSL (Secure Socket Level) encryption. Regardless of the type of security software arrangement used, settings must allow for both JavaScript and cookies for users to view protected content (Technical Requirements for Institutional Access, 2017).

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About the Author

Kyle D. Winward is technical services librarian at Central College in Pella, Iowa. Previously, he was assistant collection development librarian at Missouri State University. Prior to that, he was librarian at Southeastern Community College (Iowa) and Iowa Western Community College. He earned a Master of Arts in Library Science from the University of Missouri. His applied interests include electronic resources management and discovery systems interoperability. Kyle also reviews books and online resources in the areas of history of science and technology, information science, and the history of science fiction for *Choice Reviews*.

Target Audience: General public, Undergraduate, Graduate/Faculty/Researcher

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Keywords: citation, grammar, documentation, humanities, publishing, writing, style usage, proofreading, copy editors

Scorecard

Composite Score

3.75

Content

5.0

Authoritative (the same content as found in the latest editions of the print manual). Aside from the CMOS Contents and Users Forum, all other website content is freely available (registration not required).

User Interface/Searchability

3.5

Site navigation is consistent, and the font is large and prominent. The index and search boxes are relatively small; it is not obvious that it is necessary to click on search box icons to initiate a search. Link and search response time is excellent. Some features, such as My Manual, are not available to institutional subscribers. No LTI standard or RSI format integration.

Pricing

3.5

Multiple subscription types for individuals, small groups, and a wide diversity of types and sizes of organizations. Many of the pricing details and factors are openly available on the website.

Purchase/Contract Options

3.0

There are no provisions for archive access or interlibrary loan. Unlimited simultaneous users for institutional subscriptions. Terms and conditions for individual, group, and institutional subscriptions are openly available on the website.
