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Information and documentation — Guidelines for bibliographic references and citations to information resources

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National foreword

This British Standard is the UK implementation of ISO 690:2021. It supersedes BS ISO 690:2010, which is withdrawn.

The UK participation in its preparation was entrusted to Technical Committee IDT/2/18, Identifiers and metadata.

A list of organizations represented on this committee can be obtained on request to its committee manager.

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INTERNATIONAL STANDARD

ISO 690

Fourth edition
2021-06

Information and documentation — Guidelines for bibliographic references and citations to information resources

Information et documentation — Principes directeurs pour la rédaction des références bibliographiques et des citations des ressources d'information

Reference number
ISO 690:2021(E)

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Foreword

ISO (the International Organization for Standardization) is a worldwide federation of national standards bodies (ISO member bodies). The work of preparing International Standards is normally carried out through ISO technical committees. Each member body interested in a subject for which a technical committee has been established has the right to be represented on that committee. International organizations, governmental and non-governmental, in liaison with ISO, also take part in the work. ISO collaborates closely with the International Electrotechnical Commission (IEC) on all matters of electrotechnical standardization.

The procedures used to develop this document and those intended for its further maintenance are described in the ISO/IEC Directives, Part 1. In particular, the different approval criteria needed for the different types of ISO documents should be noted, This document was drafted in accordance with the editorial rules of the ISO/IEC Directives, Part 2 (see www.iso.org/directives).

Attention is drawn to the possibility that some of the elements of this document may be the subject of patent rights. ISO shall not be held responsible for identifying any or all such patent rights. Details of any patent rights identified during the development of the document will be in the Introduction and/or on the ISO list of patent declarations received (see www.iso.org/patents).

Any trade name used in this document is information given for the convenience of users and does not constitute an endorsement.

For an explanation of the voluntary nature of standards, the meaning of ISO specific terms and expressions related to conformity assessment, as well as information about ISO's adherence to the World Trade Organization (WTO) principles in the Technical Barriers to Trade (TBT) see www.iso.org/iso/foreword.html.

This document was prepared by Technical Committee ISO/TC 46, *Information and documentation*, Subcommittee SC 9, *Identification and description*.

This fourth edition cancels and replaces the third edition (ISO 690:2010), which has been technically revised.

The main changes compared to the previous edition are as follows:

— guidelines for citing electronic resources have been substantially extended;

— guidelines for using persistent identifiers, permalinks and Web archives are included;

— the document has been restructured to improve its readability.

Any feedback or questions on this document should be directed to the user's national standards body. A complete listing of these bodies can be found at www.iso.org/members.html.

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Introduction

Citations enable the identification and location of information resources. More importantly, citations are used to link new and derivative knowledge to existing knowledge sources, and therefore play an important role in transmission and retainment of knowledge — a process which forms the basis for the advancement of culture and science in human civilization.

In an age of democratized computing and network resources, it is increasingly important to have a consistent mechanism for citing information resources — a set of guidelines for citations that cover the proliferation of new information resource types, to enable the referencing of information resources of the past, of the present and of the future. This new edition of ISO 690 aims to address that while formalizing traditional practices.

This document describes a set of principles and practical guidelines for the creation of references and requirements for the citation of information resources. Information resources that can be cited are of diverse types, such as printed and electronic documents, from monographs to serials, cartographic to audiovisual resources, software to datasets, patents to reports and websites.

Specifically, this document provides a system for citing information resources that renders deterministic output. A citation generated by this system can be uniquely mapped back to the originally defined set of source elements. This system is intended to be applicable across all natural languages.

The citation system is built on a set of common metadata elements for information resources accompanied by a set of rendering rules. For information resource types that require additional details, for instance, audiovisual material, art and graphics as well as online resources, the system provides supplementary rules and data elements in order to handle those information resources in a tailored manner, according to established practices in these fields.

The citation system described in this document can be considered as a configurable framework for building citation styles. For example, the delimitations and context separator symbols and rules used in the citation rendering mechanism can be substituted with other methods or typographical features. It is possible to adopt partial guidance of this document and apply it to any citation style, such as to citation guidelines published by scientific periodicals or universities. This document uses an exemplar citation style, but does not indicate preference for one citation style over another.

While this document does not mandate a reference listing system, Annex A does provide definitions for a number of such systems. In this document, the numeric citation system (see A.3) is used for displaying references. Annex B specifies practices for referencing archived Web information resources.

This document does not discuss the importance of citation accuracy in detail. Citation guidelines published by universities[1)], and a Web site dedicated to the prevention of plagiarism[2)] cover this topic well. Providing the reasons for importance of citations in science is not within the scope of this document. A few examples of sources which should always be cited are given in Clause 5.

This document contains many URL-based links to Web resources. Persistence of such links cannot be guaranteed in the long term. If a resource has disappeared or if it seems that it might have changed significantly, readers are advised to retrieve the linked content from a Web archive.

1) For example https://pr.princeton.edu/pub/integrity/pages/cite/, https://integrity.mit.edu/handbook/citing-your-sources/avoiding-plagiarism-cite-your-source.

2) https://www.plagiarism.org/.

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Information and documentation — Guidelines for bibliographic references and citations to information resources

1 Scope

This document describes a set of principles, guidelines, and requirements for the preparation of bibliographic references and citations in works that are not themselves primarily bibliographical. It is applicable to bibliographic references and citations for all kinds of information resources, including but not limited to monographs, serials, contributions within monographs and serials, patents, cartographic materials, artworks, performances and diverse electronic resources, such as research datasets, databases, programs and applications, Web archives and social media, music, recorded sound, prints, photographs, graphic and audio-visual materials, archival sources and moving images.

This document provides a system for citing information resources that renders deterministic output, such that a citation generated by this system can be uniquely mapped back to the originally defined set of source elements. This system is intended to be applicable across multiple languages. Citations generated by this system are machine-parseable. The citation system described in this document can be used as a configurable framework for building citation styles.

This document does not specify a data model for machine-readable citations, although such specification may be provided in a separate document or added to a later edition of ISO 690.

Guidelines for legal citations, such as references to cases, statutes or treatises, are not addressed in this document, since such guidelines are usually country-specific[3)]. Recommendations with regards to what kind of information resources may or may not be cited, or describing the risks involved with, for example, citing social media, are not within the scope of this document[4)].

2 Normative references

The following documents are referred to in the text in such a way that some or all of their content constitutes requirements of this document. For dated references, only the edition cited applies. For undated references, the latest edition of the referenced document (including any amendments) applies.

ISO 4, *Information and documentation — Rules for the abbreviation of title words and titles of publications*

ISO 5127, *Information and documentation — Foundation and vocabulary*

ISO 8601-1, *Date and time — Representations for information interchange — Part 1: Basic rules*

3 Terms and definitions

For the purposes of this document, the terms and definitions given in ISO 5127 and the following apply.

ISO and IEC maintain terminological databases for use in standardization at the following addresses:

— ISO Online browsing platform: available at https://www.iso.org/obp

— IEC Electropedia: available at http://www.electropedia.org

3) For example, the ALWD Guide to Legal Citation, and Bluebook, are commonly used in the USA depending on jurisdiction acceptance.

4) Academic institutions or scientific publishers may not accept references for some information resources such as Wikipedia articles for research papers and other scientific documents.

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3.1
application
software or program that is specific to the solution of an application problem

[SOURCE: ISO/IEC 20944-1:2013, 3.6.3.1]

3.2
ARK
archival resource key
persistent identifier (3.32) to identify objects of any type

Note 1 to entry: The ARK identifier was implemented by the California Digital Library for custodians of archived digital objects. It emphasises the principle of stewardship of resources and their naming schemes over time.

[SOURCE: ARK home page]

3.3
asset
anything that has value

Note 1 to entry: There are many types of assets, including: a) information; b) software, such as a program or application; c) physical, such as computer; d) services; e) people, and their qualifications, skills, and experience; and f) intangibles, such as reputation and image.

Note 2 to entry: See also ISO 10668:2010, 2.1; ISO/IEC TR 21000-1:2004, 2.2.

[SOURCE: ISO 5127:2017, 3.1.1.43, modified — The definition has been generalized by omitting the phrase "to the organization".]

3.4
call number
reference provided to enable the custodian to locate a *document* (3.13) within a repository

[SOURCE: ISO 5127:2017, 3.5.22, modified — In the definition, "resource" has been replaced by "document".]

3.5
citation
reference in one *information resource* (3.20) to another information resource or to part of it

[SOURCE: ISO 5127:2017, 3.5.8.16, modified — In the definition, "document" has been replaced by "information resource".]

3.6
collection
any set of one or more *information resources* (3.20), assembled on the basis of some common characteristic, for some purpose, or as the result of some process

[SOURCE: ISO 5127:2017, 3.6.1.05, modified — The definition refers only to information resources since in this document it is the umbrella term covering everything.]

3.7
component part
entity provided by a creator to form part of a host *document* (3.13) which may have several creators

EXAMPLE An article published in a serial.

Note 1 to entry: Component part can be an intellectual contribution such as an article, a photograph embedded in a *Web resource* (3.49) or a bibliographic record in a dataset.

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3.8
continuing resource
publication, in any medium, that is issued over time with no predetermined conclusion and made available to the public

[SOURCE: ISO 5127:2017, 3.4.1.05]

3.9
creator
any entity (corporate body, family or person) that created, accumulated and/or maintained *documents* (3.13) in the conduct of personal or corporate activity

[SOURCE: ISO 5127:2017, 3.7.1.06, modified — In the definition, "records" has been deleted.]

3.10
database
collection (3.6) of machine-readable information organized so that it can be easily accessed, managed and updated

Note 1 to entry: Some databases, or files within a database, can also constitute a monograph or serial. In cases where it can readily be determined that a specific electronic document is a monograph or serial, those terms are preferred over the broader term "database".

[SOURCE: ISO 8459:2009, 2.22, modified — Note 1 to entry has been added.]

3.11
dataset
logically meaningful *collection* (3.6) or grouping of similar or related data, usually assembled as a matter of record or for research

Note 1 to entry: A dataset is organized into some type of data structure. In a database, for example, a dataset might contain a collection of business data (names, salaries, contact information, sales figures, and so forth). The database itself can be considered a dataset, as can bodies of data within it related to a particular type of information, such as sales data for a particular corporate department (see https://whatis.techtarget.com/definition/data-set).

[SOURCE: ISO 2789:2013, 2.3.11, modified — Note 1 to entry has been replaced.]

3.12
DOI® name
standardized string within the Digital Object Identifier (DOI) system for identifying a physical, digital, or abstract object and providing persistent *resolution* (3.40) to the object or information about it

Note 1 to entry: The DOI system is specified in ISO 26324.

[SOURCE: ISO 5127:2017, 3.2.5.17, modified — The definition and Note 1 to entry have been clarified to the content of "Digital Object Identifier (DOI) system".]

3.13
document
recorded information or material object which can be treated as a unit in a documentation process

Note 1 to entry: In this document, as in ISO 5127:2017, information resource is the generic term which covers other kinds of resources in addition to documents.

Note 2 to entry: Documents often are the *manifestations* (3.24) of *works* (3.51). They can differ extensively in form and characteristics.

Note 3 to entry: In some professional usage, documents are sometimes referred to as "medium", "title" or "item". In library practice, the terms "publication", "resource" and "information resource" are also common.

[SOURCE: ISO 5127:2017, 3.1.1.38, modified — The original Notes 1 and 2 to entry have been omitted.]

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3.14
digital surrogate
digital copy of an information resource

3.15
artwork
manifestation (3.24) or *work* (3.51) not primarily textual and considered to have artistic value

3.16
graphic work
two-dimensional *manifestation* (3.24) or *work* (3.51) to be understood primarily for its pictorial rather than textual content

3.17
handle system
comprehensive system for assigning, managing, and resolving *persistent identifiers* (3.32), known as handles, for digital objects and other resources on the Internet

[SOURCE: RFC 3650]

3.18
home page
landing page
Web resource (3.49) which serves as the entry point for an *information resource* (3.20) such as a research *dataset* (3.11) or *Web site* (3.50)

Note 1 to entry: A landing page surviving longer than the information resource is called a tombstone.

3.19
identifier
language-independent data string or pointer that establishes the identity of its association, alone or in combination with other elements

Note 1 to entry: This is a generalized definition of ISO 5127:2017, 3.1.12.19.

3.20
information resource
work (3.51), *manifestation* (3.24) or *item* (3.21) in physical or digital form or any other *asset* (3.3) that contributes to human knowledge

Note 1 to entry: Information resource can refer to an asset, a record, a dataset, a document or a *component part* (3.7) of a document.

3.21
item
single exemplar of a *manifestation* (3.24)

[SOURCE: ISO 5127:2017, 3.2.1.10]

3.22
key title
unique name established by the ISSN network for a continuing resource, and inseparably linked with its ISSN

Note 1 to entry: The key title can be the same as the title proper of the resource; or, in order to achieve uniqueness, it can be constructed by the addition of parenthetical identifying and/or qualifying elements such as name of issuing body, place of publication, edition statement, etc. Refer to the *ISSN Manual*.

[SOURCE: ISO 3297:2020, 3.1.4, modified — A reference to the ISSN Manual has been added.]

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3.23
landscape
orientation of a page with the longer edge running horizontally when it is in reading position

3.24
manifestation
presentation of a *work* (3.51) in a specific form

3.25
map height
vertical measurement of a map when the map is in reading position

3.26
map series
number of related map sheets designed to form a single group, normally distinguishable by such common characteristics as a collective title, a sheet-numbering system and the same scale

Note 1 to entry: Normally a map series is the work of one mapping agency.

3.27
map series designation
coded numeric or alphanumeric *identifier* (3.19) applied to a map sheet, a *map series* (3.26) or an atlas by the publisher

3.28
monographic resource
monographic publication
monograph
publication (3.34) in print or non-print form, complete in itself or intended to be completed in a finite number of parts

3.29
neat line
line separating the body of a map from the map margin

3.30
paywall
method of restricting access to content only viewable with payment

3.31
permalink
permanent link
URL (3.45) that is intended to remain unchanged for a long time

3.32
persistent identifier
PID
unique *identifier* (3.19) that is intended to remain valid for a long time

3.33
persistent URL
Persistent Uniform Resource Locator
PURL
naming and *resolution* (3.40) service for general Internet resources

Note 1 to entry: A PURL looks just like a URL, except it points to a resolution service instead of the actual location of the digital resource. The resolution service then redirects the user to the appropriate URL.

Note 2 to entry: This definition covers the service instance developed by OCLC and currently hosted by the Internet Archive.

[SOURCE: PURL, Persistent Uniform Resource Locator]

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3.34
publication
message or *document* (3.13) offered for general distribution or sale and usually produced in multiple copies

Note 1 to entry: In this document, the term "publication" is used for the information resources to which the references will be added by authors.

[SOURCE: ISO 5127:2017, 3.1.8.27, modified — Notes to entry have been replaced.]

3.35
preprint
manuscript that has not yet passed a peer review process but is nevertheless made widely available

3.36
preservation
all measures taken, including financial and strategic decisions, to maintain the integrity and to extend the life of *documents* (3.13) or *collections* (3.6)

[SOURCE: ISO 5127:2017, 3.2.1.39, modified — Notes to entry have been omitted.]

3.37
program
syntactic unit that conforms to the rules of a particular programming language and that is composed of declarations and statements or instructions needed to solve a certain function, task, or problem

[SOURCE: ISO/IEC 2382:2015, 2121372, modified — Notes to entry and accepted term "computer program" have been omitted.]

3.38
reference
data describing an *information resource* (3.20) or part thereof, sufficiently precise and detailed to identify it and to enable it to be located and retrieved

Note 1 to entry: A reference can be part of a list of information resources; the heading of an abstract or a critical review; a note appended to a text, either at the foot of the page or at the end of a text; or a statement embodied in the text.

3.39
research data
data collected, observed, or created, for purposes of data analysis to produce original research information and results

[SOURCE: ISO 5127:2017, 3.1.10.10]

3.40
resolution
act of retrieving information related to an identified entity

Note 1 to entry: Information retrieved can include links to one or more current locations associated with the identified entity, delivering metadata about the identified entity or institution in an appropriate format, or delivering a manifestation of a document without requiring further intermediaries.

Note 2 to entry: Resolution services are provided by special applications called resolvers. For instance, the DOI and Handle systems use HANDLE.NET software. From network point of view, resolution is an additional functional layer above network protocols such as HTTP. Where the identifier is represented as a URL, resolution can result in an HTTP redirect.

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3.41
serial
publication (3.34) in print or non-print form, issued in successive parts, usually having numerical or chronological designations, and intended to be continued indefinitely, whatever its periodicity

Note 1 to entry: Serials can include periodicals, journals, newspapers, annuals, etc.

[SOURCE: ISO 5127:2017, 3.4.1.28.01]

3.42
series
monographic series
group of separate *information resources* (3.20) related to one another by the fact that each information resource bears, in addition to its own title proper, a collective title applying to the group as a whole

Note 1 to entry: The individual information resources may or may not be numbered.

[SOURCE: ISO 5127:2017, 3.4.1.27.02, modified — Replaced "resources" with "information resources" in definition and in Note, added reference for definition of "information resource", removed internal references to terms provided in original document.]

3.43
social media
online technologies and practices that people use to share opinions, insights, experiences and perspectives with each other, transforming traditional one-to-many interactions into many-to-many interactions

[SOURCE: ISO 19731:2017, 3.33]

3.44
URI
Uniform Resource Identifier
compact sequence of characters that identifies an abstract or physical resource

[SOURCE: ISO/IEC 12785-1:2009, 3.23]

3.45
URL
Uniform Resource Locator
type of *URI* (3.44) which can be used to identify *documents* (3.13) on the Internet by specifying the address of the resource or information about it and the access protocol used

3.46
URN
Uniform Resource Name
persistent, location-independent resource *identifier* (3.19) used for recognition of, and access to, characteristics of the resource or the resource itself

[SOURCE: ISO 5127:2017, 3.1.9.22]

3.47
Web archive
entire set of *resources* (3.49) crawled from the Web over time, comprising one or more *collections* (3.6)

[SOURCE: ISO/TR 14873:2013, 2.4]

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3.48
Web archiving
Web harvesting
Web scraping
process of creating a *Web archive* (3.47)

Note 1 to entry: Web archiving is usually done with Web crawler applications. The process begins from seed pages; a crawler retrieves these Web resources, collects hyperlinks from them, and uses these new links to retrieve new set of pages. This process continues as long as new pages are found. Selective harvesting collects resources according to certain criteria.

3.49
Web resource
digital multimedia object as delivered from the Internet or a *Web archive* (3.47) on request to a client system

[SOURCE: ISO 5127:2017, 3.3.3.25, modified — The original term is "webpage". Web archive has been included.]

3.50
Web site
collection (3.6) of logically connected *Web resources* (3.49) managed as a single entity and accessed through the same base *URL* (3.45)

[SOURCE: ISO 5127:2017, 3.3.3.24]

3.51
work
distinct intellectual or artistic creation

[SOURCE: ISO 5127:2017, 3.2.1.07]

4 Principles for creating references

4.1 Purpose

There are two major goals in the creation of references.

a) Giving credit to other authors whose work has been utilized: This practice encourages the creation of original work and enables the reader to understand how the authors' work relate to other works.

b) Enabling readers to check the sources used and validity of the conclusions made: Referred sources may also help the readers to find new relevant documents.

The principles described here are intended to help facilitate these goals.

They cover all information resources, and may be applied to any asset in physical or digital form that contributes to human knowledge.

NOTE Generally, quoting other information resources without citing them can be considered plagiarism, depending on the percentage of un-cited material copied.

4.2 Principle 1: Ensure metadata accuracy

The metadata in a reference should be accurate for crediting the creator or creators of the cited information resource and for the reader to locate the cited information resource.

This principle facilitates achievement of the goal of 4.1 a).

EXAMPLE 1 The practice of providing classical music references with opus or catalogue numbers (where available) is a manifestation of this principle.

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EXAMPLE 2 The practice of distinguishing the citation of an information resource or of a gateway to the information resource is a manifestation of this principle; for instance, a citation of a video differs from a citation of an Internet page that displays the same video.

4.3 Principle 2: Prioritize identification and retrieval

A reference should prioritize identification and retrieval of the cited information resource, and the enablement of retrieval of a cited information resource.

This principle facilitates achievement of the goal of 4.1 b).

EXAMPLE The practice of providing an actionable persistent identifier in form of an URI facilitates accurate retrieval.

4.4 Principle 3: Unify reference presentation

A uniform reference presentation helps the reader to understand the metadata of cited information resources, and makes it easier for the authors to apply the same concepts and style across different information resource types.

This principle facilitates achievement of 4.1 a) and 4.1 b).

EXAMPLE The metadata element sections in Clause 8 provide a unified framework for arranging metadata elements in a reference across information resource types.

4.5 Principle 4: Determine appropriate specificity

A reference should have an appropriate level of specificity in order to allow the reader to locate the cited information resource. For instance, if the cited information resource is an article in a serial issue, it is necessary to specify that the reference refers to the article, not the issue or the serial itself.

This principle facilitates achievement of 4.1 b).

5 Guidelines for creating references

5.1 General

The reference system described in this document has been created to follow guidelines stated in this clause.

They are meant to align with principles stated in Clause 4.

5.2 Facilitate location of the cited information resource

Metadata elements in a reference should be selected for and provided to allow the reader to locate and retrieve the cited information resource, whether it is publicly available or not.

Extra information should be provided if it helps the reader locate the resource.

If the cited information resource is a component part of a host information resource, and is not available separately, the locatability of the host information resource should be prioritized. The method of locating the cited component part within the host information resource should also be provided in the reference.

The metadata element sections in Clause 8 are arranged in a way to facilitate locatability of the cited information resource.

This aligns with the principle stated in 4.3.

See also 5.8.

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5.3 Reflect the content used accurately

The metadata recorded in the reference shall reflect the correct edition or version of the cited information resource.

EXAMPLE If a preprint was used instead of the published version of the article, the reference applies to the former, since the layout and/or content of the final (published) version can differ from the preprint.

It is necessary to distinguish between a citation to an information resource compared to a citation to a gateway that displays the information resource.

If the cited information resource is dynamic, and it is important to specify the version used, the citation should contain information with which the version may be identified and retrieved, such as the usage date, and a link to an archived copy of the appropriate version of the cited resource. The same approach may be used for Internet resources, if there is a risk that they can be lost or modified in the short or long term.

This aligns with the principle stated in 4.3.

See also 5.5 and 7.6.

5.4 Reference derivative works alongside the original

Derivative works, works based on or about other information resources are also information resources themselves that can be cited. Derivative works include quotations, commentaries or interpretations from other resources about the information resource, another author's theories about the information resource, experiments, case studies and results in accordance with the information resource.

References of derivative works should make it clear that the cited information resource has been derived from an original work, and specify the original work in question.

This aligns with the principle stated in 4.3.

See also 7.14.

5.5 Faithfully reference the manifestation and item

The same intellectual content (work) may be published or otherwise made available to the public in several manifestations. For instance, a book may be available in different printed and electronic formats, and some of those formats may differ from the original manifestation of the work (e.g. they can have additional, abridged and/or edited content). Each manifestation appears in distinct instances: a physical book manifestation appears in multiple physical copies, and a play staging is performed in the same form in multiple repeated performances.

It is important to distinguish between a citation to the manifestation of an information resource, and to a specific item of such manifestation, and the appropriate conditions to cite an item.

If there have been changes to the intellectual content of the work in manifestations since its creation, it is essential to indicate in the citation the particular content referred to. This is done by referring to editions or versions in the citation (see 7.6). If the changes have been so extensive as to result in a new work, the relation between the new work and the old may be indicated as a related work (see 7.14).

NOTE New manifestations for digital materials can emerge, for example, if the digital preservation migration strategy is used, i.e. outdated manifestations of information resources will be replaced with more modern ones. Cited resources can therefore eventually be available in multiple file formats, and there will be subtle (or even not so subtle) differences between them, even in the intellectual content. Information systems in the future can give users access to the original, authentic manifestation, but they will inform the users also about the more modern migrated manifestations, which will be easier to use. Preservation metadata, which describes the differences between manifestations, will enable long-term preservation systems to do this.

This aligns with the principle stated in 4.3.

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See also 5.3.

5.6 Consider retrievability of unpublished information resources

It is sometimes necessary to use unpublished information resources, such as personal communications, manuscripts or ephemeral Internet resources. Caution shall be taken in these cases because unpublished information resources may be neither locatable nor retrievable. Ethics of using such material as a source can be questionable.

This document provides guidelines for citing unpublished information resources, but these guidelines do not constitute recommendation or permission to use such resources for referencing. Organizations can have local guidelines which forbid referencing of unpublished or certain other kinds of information resources.

This aligns with the principle stated in 4.3.

5.7 Adopt a uniform presentation scheme

It is important for the reader to understand what metadata is provided. Since there are many types of information resources, a uniform reference presentation applying the same concepts and structure makes it easier to understand the references.

A uniform style, format and punctuation scheme shall be used for all references in a publication, regardless of the style guide being used.

The metadata element sections in Clause 8 describe the necessary and optional metadata elements for different information resource types.

This aligns with the principle stated in 4.4.

5.8 Accurately indicate specificity level

The creator of the reference should determine the appropriate level of specificity at which the reference is made (e.g. to the entire information resource or to a specific component part or data elements in it) based on the purposes of the citation and the use that was made of the cited resource.

A reference system should provide methods to reference component parts of information resources with the ability to indicate specification level. See 7.4 for more information.

This aligns with the principle stated in 4.5.

See also 5.2.

6 Metadata

6.1 General

This clause describes handling of metadata of information resources. Such metadata is used to provide input data for Clause 7 in the creation of references.

6.2 Data source

6.2.1 General

Metadata sources should be selected in accordance with requirements stated in this clause.

Metadata elements for the reference should be taken from the following sources, in order of preference:

— the cited information resource or its embedded metadata; and

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— external metadata sources.

This preference is based on the assumption that the cited information resource contains metadata created or approved by the creator.

If the cited information resource does not contain all the necessary metadata to create a reference with the desired accuracy, external metadata sources should be used in addition to the cited resource. For example, re-posted social media content may not provide enough metadata to refer to the original work.

This aligns with the principle stated in 4.2.

6.2.2 Cited information resource

Metadata elements may be obtained from the cited information resource, in order of preference, from the following constituents:

a) title page or equivalent;

EXAMPLE 1 Title screen, home page, disc label, map face.

b) embedded or external metadata;

EXAMPLE 2 Source code, a landing page about the cited information resource.

c) dedicated metadata descriptions within;

EXAMPLE 3 Verso of title page, header.

d) cover or label permanently associated with the cited information resource;

EXAMPLE 4 Captions on graphic works, microfiche headers, headers in still image files.

e) container;

EXAMPLE 5 Slipcase, clam-shell case, electronic containers.

f) accompanying documentation;

EXAMPLE 6 Explanatory leaflet, manual.

g) source file of a Web page (e.g. in case of malware examples).

EXAMPLE 7 HTML source code of a Web page.

6.2.3 External metadata sources

For some information resource types, such as in classical music, accurate authoritative identification numbers are important, and greater accuracy of metadata is required.

In these cases, external metadata, preferably authoritative metadata, should be consulted to check and supplement the metadata given in the cited information resource. Authority and bibliographic databases, data catalogues and research data landing pages are typical sources of external metadata.

If a cited information resource is a component part of a host information resource, metadata from the host resource may be used. This applies also to cited information resources that belong to fonds, collections and archives.

A human readable source of metadata should be preferred to other kinds of metadata sources. Reading may require rendering of the source document with an appropriate program or application.

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6.3 Verifying correctness and completeness

External metadata from machine-readable, microform or audio-visual sources may be used to verify the accuracy of metadata elements in the reference.

External information resources such as ISNI, ORCID, VIAF or ISSN databases may help in finding the appropriate metadata and in completing or correcting the reference.

6.4 Handling conflicting data

If a metadata element such as a name appears in different forms in the cited information resource, the form appearing most prominently should be used unless that form is obviously wrong, such as an incorrect disc label attached to an LP.

If a metadata element appears in different forms in different cited resources, the form most commonly used in the language of the publication should be selected.

7 Data elements

7.1 General

7.1.1 Architecture of a citation

7.1.1.1 Types of data elements

A citation generally captures three types of information, namely:

a) characteristics of the cited information resource;

EXAMPLE 1 Creator, title, medium, date of publication.

b) relations of the cited information resource with other information resources;

EXAMPLE 2 Translated from, Catalogued in, Exhibited at.

c) characteristics of the citation.

EXAMPLE 3 Date of citation.

7.1.1.2 Order of data elements

The order of data elements specified in a citation should be according to the following preferred manner:

a) attributes of the cited information resource;

b) relations of the cited information resource with other information resources;

c) attributes of the citation.

For supported information resource types, please refer to Clause 8 for the specific order of data elements.

7.1.1.3 Elements and attributes

A data element is a description belonging to one of these three types of information. A citation adhering to the rules of this document consists of multiple data elements, and may be presented using the following building blocks.

a) A citation consists of a sequence of data elements.

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EXAMPLE 1 A citation to a monograph generally starts with the creator(s), followed by the title and publication information.

b) A data element belongs to a class, which captures a generic characteristic.

EXAMPLE 2 Examples of data element classes include "contributor", "relation", "date".

c) Some data elements belong to a subclass, which is a specialization of a class. In this document they are described as data element types.

EXAMPLE 3 Examples of data element types include "author" as a specialization of "contributor", "translated from" as a specialization of a "relation", "date of citation" as a specialisation of "date".

d) A data element class or subclass may be identified by a data element label.

EXAMPLE 4 The "catalogued in" relationship is identified by the data element label "Catalogued in".

e) A data element contains zero or more values which describe or label the characteristic captured by the data element.

EXAMPLE 5 The "creator" data element accepts multiple values of the same type.

f) A value is a description or label. The type of value may either be text, date, number, citation, or a set of one or more values. A value may be drawn from a defined enumeration. A citation entered as a value is called an internalized reference.

EXAMPLE 6 The "catalogued in" relationship accepts two values of different types: a citation as its first value, and the catalogue identifier as its second value.

g) A value may consist of multiple data attributes, which themselves capture characteristics of the value.

EXAMPLE 7 The values of the "creator" and "title" data elements accept attributes of translation, transliteration and transcription information.

h) Each data attribute may have zero or more values, which describe those characteristics. As with d), each data attribute value may have data attributes of their own.

EXAMPLE 8 A script conversion system code can be set to the value of the transliteration data attribute, which itself is a value of the "title" data element.

i) Contexts, which are used for disambiguation purposes, may be assigned as values to data elements or data attributes.

EXAMPLE 9 Providing an internalized reference to relationships can cause confusion on whether data elements belong to the cited resource or to the related resource if the internal and external contexts are not separated.

7.1.2 Common rules

7.1.2.1 General

This clause specifies common rules that apply to all data elements.

7.1.2.2 Readability and understandability of references

References made in a publication should adhere to the language and script of the publication, in order to enable the reader of the publication to understand the references.

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For instance, language of labels and phrases such as "In:" or "Available from:", or attribute names such as "cast date" should be based on the language and script of the publication containing the citation rather than the language and script of the cited publication.

EXAMPLE 1 In an article written in Finnish, it is better to use phrases "Julkaisussa:" ("In:" in Finnish) and "Saatavissa:" ("Available from:" in Finnish) than "In:" and "Available from:".

When a cited information resource is in a different language or script than that of the host publication, the provided values of the cited information should remain in its original language and script.

NOTE 1 The ability to enable location of the cited information resource is retained by keeping data elements of the cited information resource in their original language and script.

Data elements in a citation that are not in the language and script of publication should be appended with associated information presenting the data element converted into the (main) language and script used in the publication. Such conversion process can be through translation, transcription or transliteration, as appropriate, in accordance with suitable international or national standards or other technical specifications, and the needs of the reader community.

EXAMPLE 2 For a publication written in Latin script, any data element in a non-Latin alphabet in the cited information resource is Romanized, with the Romanized portion appended to the data element as associated information.

EXAMPLE 3 For a publication not written in Latin script, any data element in a Latin alphabet in the cited information resource is translated, transliterated or transcribed to the script used, with the converted portion appended to the data element as associated information.

EXAMPLE 4 In some communities in Greek academia, within a document in Greek script, the convention is to retain references in Latin scripts without any conversion, and transliterate or transcribe non-Greek scripts into Latin script.

EXAMPLE 5 In some communities where documents are written in East Asian scripts, the convention is to provide associated translations to reference titles in Latin scripts, and transliterations of reference creators for understandability and readability.

If data elements used in a citation are already provided in the script of publication from the information resource, the provided information should be used for this purpose.

EXAMPLE 6 金庸 [Louis Cha Leung-yung].《天龍八部》 *[Demi-Gods and Semi-Devils].* Hong Kong, 1963.

Multiple transliteration and transcription systems may exist for the conversion of a language-script pair towards a certain script. In these cases, associated information that contains converted information originating from transliteration or transcription should be provided with the ISO 24229 code of the transliteration or transcription system used in the conversion. This code can be provided either as associated information or as description in other parts of the document.

EXAMPLE 7 葛飾 北斎 [translit: Katsushika Hokusai {var-jpn-hrkt-latn-hepburn-1867}], 『神奈川沖浪裏』 [*trans.: The Great Wave off Kanagawa*] [*translit.: Kanagawa-oki Nami Ura {var-jpn-hrkt-latn-hepburn-1867}*]. Edo, 1831. At: British Museum, Department of Prints and Drawings, London. Museum number 2008,3008.1.JA.

EXAMPLE 8 黄公望 [translit: Hwang Kung-Wang (var-zho-hani-latn-wg-1912)], 《富春山居圖 (無用師卷)》 [*trans.: Dwelling in the Fuchun Mountains (''The Master Wuyong Scroll'')*] [*translit.: fu chun shan jyu tu (wu yong shih jyuan) {acadsin-zho-hani-latn-2002}*]. c. 1347-1350. At: National Palace Museum, Taipei.

If both translated title and its transliteration or transcription are given, a semicolon may be used as a delimiter between them, or they can be explicitly labelled as "transliteration" (or abbreviated as "translit.") and "translation" (or abbreviated as "trans.").

EXAMPLE 9 『訓民正音』 [The Proper Sounds for the Instruction of the People; Hunminjeongeum]

EXAMPLE 10 『訓民正音』 [trans.: The Proper Sounds for the Instruction of the People; translit.: Hunminjeongeum].

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Alternate scripts may be provided as associated information to aid understanding of the referenced information resource. Such information may be provided together with the script code of ISO 15924.

EXAMPLE 11 『訓民正音』 [훈민정음 {Hang}].

EXAMPLE 12 『源氏物語』 [The Tale of Genji; げんじものがたり{Hrkt}].

NOTE 2 Recommending specific transliteration, transcription or Romanization systems is outside the scope of this document. ISO 24229 provides a list of such systems (for instance, Romanization systems for Japanese include ISO 3602, ISO 3602 Strict, Hepburn, JSL, ALA-LC and Wapuro).

7.1.2.3 Abbreviation

Generally accepted bibliographic terms should be abbreviated in accordance with the rules established in ISO 832.

Additional abbreviation rules are available for specific resource types and these are provided in Clause 8, as well as in 8.4.3 for series titles and A.5.2 for running notes.

Other abbreviations should be avoided unless specified in this document.

7.1.2.4 Rendering system and rules

7.1.2.4.1 General

A consistent system of punctuation and typography is necessary throughout a list of references and between data elements for this information to be unambiguous, understandable and machine readable. This document utilizes punctuation and typography as means to implement syntactical rules for the rendering and understanding of references and citations.

This document provides two mechanisms to render references that fulfils the above goals.

The "explicit notation" is a fully machine-readable rendering, unambiguous to humans and machines. It is designed to utilize minimal rules to render and parse, but it is more lengthy than traditional renderings and ignores the citation tradition.

The "implicit notation" is also a fully machine-readable rendering but with output much closer to the citation tradition. It is developed based on the explicit notation, combined with addition rules such as omission of labels, additional delimitation using formatting and punctuation, and a defined order of data elements according to information resource types. A reference in implicit notation is more complex to parse for machines but much shorter than its equivalent in explicit notation.

This document mainly utilizes the implicit notation to demonstrate referencing.

7.1.2.4.2 Explicit notation

The explicit notation of a citation gives, for each data element, a label expressing the characteristic captured, and the subclass if present, a list of values, a list of attributes for each value, itself consisting of the label and values for that attribute, the codesets for any enumeration values, an indication of the scope of elements consisting of multiple data elements themselves.

The explicit notation of a citation facilitates direct translation between a written citation and a machine-readable citation in formats such as JSON and YAML.

NOTE This document does not currently prescribe a machine encoding of citations; this topic can be addressed in the future.

The following syntax elements are used to build and structure a citation in explicit notation.

a) Label-value delimiter. This is the delimiter that separates a data element label from the data element value, and the data attribute label from the data attribute value. In a Latin script document, the

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colon ":" is used for such separation, and the casing of a label is inconsequential. Since the labels are intended to improve machine readability, the names of labels in this document should be used.

EXAMPLE 1 The following examples demonstrate how the delimiter separates the data element label from the data element value:

Primary creator: DÜRER, Albrecht

Available from: https://artinwords.de/albrecht-duerer-feldhase-1502/.

EXAMPLE 2 The following examples demonstrate how the delimiter separates the data attribute label from the data attribute value:

role: translator

translation: Demi-Gods and Semi-Devils

b) Data element delimiter. This is the delimiter that separates data elements. In a Latin script document, the full stop: "." is used as the data element delimiter. Care should be taken that a full stop within a value is not misunderstood as delimitation.

EXAMPLE 3 In this example, the full stop is used to separate the data elements into: creators, title, production information.

Primary creator: BEETHOVEN, Ludwig van [role: composer]. Title: Symphony no. 9, op. 125, D minor. Secondary creator: Friedrich SCHILLER [role: lyricist]. Publisher location: Mainz. Publisher name: B. Schott's Söhne. Publishing date: 1826.

For illustrative purposes, the example is separated into multiple lines to demonstrate the separation between data elements.

Primary creator: BEETHOVEN, Ludwig van (role: composer).

Title: Symphony no. 9, op. 125, D minor.

Secondary creator: Friedrich SCHILLER (role: lyricist).

Publisher location: Mainz.

Publisher name: B. Schott's Söhne.

Publishing date: 1826.

c) Value delimiter. This is the delimiter that separates multiple values, used in the assignment of multiple values to a data element or a data attribute. In a Latin script document, the semicolon ";" is used as the value delimiter.

EXAMPLE 4 In this example of a list of creators, the delimiter is used to separate the data element values.

BEETHOVEN, Ludwig van; SCHILLER, Friedrich.

d) Label-value pair delimiter. This is the delimiter that separates label-value pairs. In a Latin script document, the semicolon ";" is used as the delimiter.

EXAMPLE 5 This example indicates the separation of attribute label-value pairs:

translation: Demi-Gods and Semi-Devils; transliteration: tin1 lung4 baat3 bou6

e) Attribute context delimiters. These are the delimiters that enclose attributes for a value. In a Latin script document, the square brackets: "[" and "]" are used.

EXAMPLE 6 The following examples indicate setting of attributes on values for specifying creator roles.

REID, Dan G [role: translator]

ELLIS, Osian [role: editor]

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EXAMPLE 7 The following examples indicates setting of attributes on values for specifying transliteration of the title.

天龍八部 [transliteration: tin1 lung4 baat3 bou6]

易經 [transliteration.: I-ching]

EXAMPLE 8 The following examples indicates setting a value attribute on a value of an attribute.

易經 [transliteration: I-ching [system: var-zho-hani-latn-1912]]

天龍八部 [transliteration: tin1 lung4 baat3 bou6 [system: iso.24229.lshk-zho-hani-jyutping]]

f) Context delimiters. These are the delimiters that separate contexts. In a Latin script document, the curly braces: "{" and "}" are used as context delimiters.

EXAMPLE 9 This example demonstrates a surrogate-of relationship that can pose ambiguity without context separation – the "At:" portion can be applied to the cited information resource if there was no separation.

Physical surrogate available at: {Title: Diplodocus skeleton. Medium: cast. Location: Pittsburgh [Region: US-PA]. Date created: 1905. At: Natural History Museum, London [Region: GB-ENG].}

g) Data value hierarchy delimiter. This delimiter separates a parent value from a child value in a multi-level manner. In Latin script, the colon ":" symbol is used for this purpose.

EXAMPLE 10 This example demonstrates a subordinate body of an organization being delimited in hierarchy.

U.S. DEPARTMENT OF HEALTH AND HUMAN SERVICES: Substance Abuse and Mental Health Services Administration: Office of Applied Studies.

h) Whitespace before and after punctuation is considered inconsequential and does not affect the performance or uniformity of this rendering scheme.

EXAMPLE 11 Despite aberrant whitespace usage in this example negatively impacting readability, it is considered acceptable to the rendering rules stated in this document.

Primary creator: SCARPA, Romano. Title: Walt Disney's Mickey Mouse: The Delta Dimension. Series: The Disney Masters Collection; as: vol. 1. Published location: College Park [Region: US-MD]. Publisher: Fantagraphics. Published date: 2018. ISBN: 978-1-68396-096-6.

7.1.2.4.3 Implicit notation

The implicit notation builds on the explicit notation and streamlines citation content to put the citation format closer to traditional representation, which is more human-readable, by taking advantage of available typographical features and contextual information.

It differs from the explicit notation in the following important aspects:

— Omission of labels. Core data elements in a citation, such as primary creator, title, medium, publisher, publication location, publication date, shall have their labels omitted for simplicity.

— Data elements are ordered. In explicit notation, data elements do not need to be placed in a specific order. Since implicit notation uses label omission, the order of key data elements is mostly fixed. For instance, the primary creator is most often required to be the first data element.

— Typographical features are used for distinguishing data elements. For instance, the title of the information resource is rendered in italics. In explicit notation, typographical features are not used for delimitation.

— Information resource types are used to define the order of data elements. For instance, in citing an entire serial (see 8.4.2.1), the order of required data elements are: title, format and resource type, edition and version, place and publisher, date of publication.

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— Data elements may be presented according to patterns. For instance, place, publisher, and date of publication can be presented in the pattern of "{place}: {publisher name}, {date of publication}" or just "{publisher name}, {date of publication}". In explicit notation, all of these data elements are presented separately.

If an implicit notation citation maps exactly to one explicit notation citation, the implicit notation citation is unambiguously machine-readable. However, rendering implicit notations requires more intelligence on the machine side than processing of explicit notations.

The following additional delimiters and rules, on top of those for explicit notation, are used to build and structure a citation in implicit notation.

NOTE 1 Some of the rules introduced here are not applied in all examples.

a) Omission of core data element labels. The data element labels for primary creator, title of the information resource, title of series of information resource, format and resource type, size, edition and version, place and publisher, date of publication should be omitted.

EXAMPLE 1 This implicit citation example demonstrates the omission of data element labels:

SCARPA, Romano. *Walt Disney's Mickey Mouse: The Delta Dimension*. The Disney Masters Collection, vol. 1. College Park: Fantagraphics, 2018. ISBN 978-1-68396-096-6.

b) Label-value delimiter. If the omission of the delimiter does not affect understandability, the delimiter may be omitted.

EXAMPLE 2 This example indicates that the cited information resource can be retrieved from the said URL.

Available from: https://artinwords.de/albrecht-duerer-feldhase-1502/.

c) Omission and abbreviation of data attribute labels. Certain data attribute labels may be abbreviated as described in Clause 7 and Clause 8.

EXAMPLE 3 The labels "transliteration" and "translation" can be abbreviated as "translit." and "trans.".

If the attribute value allows direct inference of the attribute label, the attribute label may be omitted.

EXAMPLE 4 The following examples indicate the omission of the "translation:" label:

Magna Carta Libertatum [Great Charter of Freedoms]

《蘭亭序》 [Preface to the Poems Collected from the Orchid Pavilion]

EXAMPLE 5 This example indicates unambiguous omission of the attribute label, as the reader will understand it is a translation followed by a transliteration:

源氏物語 [The Tale of Genji; Genji monogatari].

d) Order of data elements within the citation should adhere to guidance for the type of the cited information resource, as provided in Clause 8.

EXAMPLE 6 When citing an audio-visual recording, the order of data elements in 8.7.2.2 are adhered to: name of creator, followed by title of the information resource, format and resource type, edition and version, series title and number, place and publisher/film studio/distributor, date of publication, date of restoration/revision, distributor or online host, persistent identifier, network location and access, physical location, relationships, date of citation.

e) Additional rules for data element delimiter. In implicit notation, as identification of data element labels are implicit, care should be taken that a full stop within a value is not misunderstood as delimitation.

EXAMPLE 7 In this implicit citation example, the full stop is used to separate the data elements into: creators, title, production information.

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BEETHOVEN, Ludwig van (composer). *Symphony no. 9, op. 125, D minor*. Friedrich SCHILLER (lyricist). Mainz: B. Schott's Söhne, 1826.

If the element (for instance, title) ends with a punctuation mark, such as the question mark or exclamation mark, it replaces the full stop as the data element delimiter.

EXAMPLE 8 In this example, the question mark separates the title and production information.

TSHERNYSHEVSKY, N. G. Mitä on tehtävä? Petroskoi: Karjalais-suomalaisen SNT:n valtion kustannusliike, 1956.

EXAMPLE 9 In this example of production information, the colon and comma are used to separate the data elements into: place: publisher, year of publication.

College Park: Fantagraphics, 2018.

EXAMPLE 10 In this example of volume information, the comma is used to separate the data element values into: volume, issue number, page.

vol. 62, no. 1, pp. 2–23.

f) Additional rules for value delimiter. The data element for "creator" and the data attribute "role:" should utilize the semicolon ";" in conjunction with immediately consecutive capital letters to delimit names. For compatibility with traditional practice, comma may also be used if machine readabilty is not required.

EXAMPLE 11 This list of creators uses the comma to separate the data element values.

BEETHOVEN, Ludwig van, SCHILLER, Friedrich.

EXAMPLE 12 This list of creators uses the semicolon in combination with the consecutive capital letters to separate the data element values.

BEETHOVEN, Ludwig van; SCHILLER, Friedrich.

EXAMPLE 13 This list of creators uses the keyword "and" to separate the data element values.

BEETHOVEN, Ludwig van and SCHILLER, Friedrich.

EXAMPLE 14 This list of roles uses the comma to separate values.

commentator, trans.

g) Additional rules for attribute context delimiters. For compatibility with traditional practice, the data element for creator role accepts the parentheses "(" and ")" as attribute context delimiters. The attribute context delimiters may be omitted in the case for relationships if the omission does not cause confusion of attribute context.

EXAMPLE 15 The following examples indicate usage of parentheses for specifying creator roles, with the attribute label "role:" omitted.

REID, Dan G (trans.).

WILHELM, Richard (commentator, trans.).

ELLIS Osian (ed.).

EXAMPLE 16 Used in the context expecting a value indicating place, these examples demonstrates unambiguous omission of the attribute label of "region:", as the reader will clearly understand they are place qualifiers.

TRINITY COLLEGE [Cambridge]

[US-PA]

h) Value qualifier context delimiters. These are the delimiters that provide qualification for a value. In a Latin script document, the curly braces "{" and "}" are used as delimiters.

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EXAMPLE 17 This example indicates the transliteration value "I-ching" is performed using the var-zho-hani-latn-1912 system from ISO 24229.

translit.: I-ching {var-zho-hani-latn-1912}

EXAMPLE 18 The following examples indicates setting a value attribute on a value of an attribute using the value qualifier context.

易經 [translit.: I-ching {var-zho-hani-latn-1912}]

天龍八部 [translit.: tin1 lung4 baat3 bou6 {iso.24229.lshk-zho-hani-jyutping}]

i) Context delimiters. In implicit notation, the context delimiters are used more often than in explicit notation as many data element labels are omitted. Its usage is identical in both notations.

EXAMPLE 19 This example demonstrates a surrogate-of relationship that can pose ambiguity without context separation – the "At:" portion can be applied to the cited information resource if there was no separation.

Physical surrogate available at: {Diplodocus skeleton. Cast. Pittsburgh [US-PA], 1905. At: Natural History Museum, London [GB-ENG].}

j) Emphasis indicator. The emphasis typography style is used to indicate the primary location string that can help the reader locate the cited information resource. In a Latin script document, the "italic" typography style is applied as the emphasis indicator. Usage in other languages and scripts should use indicators according to convention in those languages and scripts, such as title symbols.

EXAMPLE 20 This example demonstrates the information resource title as the primary location string for a monograph.

Walt Disney's Mickey Mouse: The Delta Dimension.

EXAMPLE 21 This example demonstrates the information resource title as the primary location string for a monograph in a series, as this monograph is independently locatable with a separate ISBN.

There's Treasure Everywhere: A Calvin and Hobbes Collection. Calvin and Hobbes, Book 15. 1st ed. ISBN 978-0-8362-1312-6.

EXAMPLE 22 This example demonstrates the information resource series title as the primary location string for an article in a serial.

On Computable Numbers, with an Application to the Entscheidungsproblem. In: *Proceedings of the London Mathematical Society*, vol. s2-42, no. 1, pp. 230-265.

NOTE 2 Normally "In:" is omitted in the separation of article and serial titles, but it is applied in the example to make the reference machine understandable.

EXAMPLE 23 This example demonstrates typographical emphasis of information resource titles in non-Latin script documents.

(Chinese)《蘭亭序〈褚遂良本〉》

(Korean)《詩經 (시경)》

(Japanese)「蘭亭叙『虞世南臨本』」

With these stated patterns and rules, it is possible to fully delimit and map data elements of a citation to deterministic textual output, and allow an unambiguous reading of the textual output to its data elements.

EXAMPLE 24 The following example can be delimited and determined to be of the pattern that fits a "component part of a serial", and therefore the data element order is according to 8.4.2.2:

SCARPA, Romano. *Walt Disney's Mickey Mouse: The Delta Dimension*. The Disney Masters Collection, vol. 1. College Park [US-MD]: Fantagraphics, 2018. ISBN 978-1-68396-096-6.

{creators}. {title}. {series with series locality}. {production information}. {identifier}.

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EXAMPLE 25 The following example can be delimited and determined to be of the pattern that fits a "monograph", and therefore the data element order is according to 8.2.1:

金庸 [Louis Cha Leung-yung]. 《天龍八部》 [Demi-Gods and Semi-Devils]. Hong Kong: Ming Ho Publications, 1963.

{creator [with translation]}. {title [with translation]}. {production information}.

EXAMPLE 26 The following example can be delimited and determined to be of the pattern that fits a "component part of a serial", and therefore the data element order is according to 8.4.2.2:

WILHELM, Richard (commentator). *The I Ching, or, Book of Changes*. In: {Bollingen Series, vol. 170}, Book XIX. Translated from German to English. Cary F. Baynes (trans.). 3rd ed. Princeton [US-NJ]: Princeton University Press, 1967. Translation of: {I Ging. Das Buch der Wandlungen. Jena: Eugen Diederichs Verlag, 1924. Translated from Chinese to German. WILHELM, Richard (commentator, trans.)}.

{creator [with role]}. {title}. {series with series locality}. {translation information}. {secondary creator [with role]}. {edition information}. {production information}. {translation relationship [with internalized reference]}.

EXAMPLE 27 The following example can be delimited and determined to be of the pattern that fits a "component part of a serial", and therefore the data element order is according to 8.4.2.2:

WATTERSON Bill. [You've taught me nothing except how to cynically manipulate the system]. In: {WATTERSON Bill. *There's Treasure Everywhere: A Calvin and Hobbes Collection.* 1st ed. Calvin and Hobbes, Book 15. Kansas City: Andrews McMeel Publishing, 1996. ISBN 978-0-8362-1312-6}.

{creator}. {title [untitled with description]}. {series [with internalized reference]}

7.1.2.5 Associated information

Associated information of a data element includes:

— optional information defined in Clause 7 for each data element; or

— optional information defined in Clause 8 specifically for resource types.

Associated information of a data element are expressed as attributes, placed within attribute context delimiters, in accordance with 7.1.2.4.

EXAMPLE 1 In explicit notation:

Magna Carta Libertatum [transliteration: Great Charter of Freedoms]

In implicit notation:

Magna Carta Libertatum [trans.: Great Charter of Freedoms]

Multiple pieces of associated information for a data element should be expressed in accordance with 7.1.2.4.

EXAMPLE 2 In implicit notation:

《蘭亭序》 [trans.: Preface to the Poems Collected from the Orchid Pavilion; translit.: Lant'ing Hsü]

In cases where multiple pieces of associated information exist but can be easily distinguished against each other, the attribute label and delimiter may be omitted in accordance with 7.1.2.4.

EXAMPLE 3 In implicit notation:

『法華義疏』 [Annotations to the Lotus; Hokke Gisho]

If a piece of associated information requires additional qualification within the value, such as the specification of a value type, this information can be provided as a qualified value in according to 7.1.2.4.

EXAMPLE 4 In implicit notation:

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《易經》 [trans.: The Book of Changes; translit.: I-ching {var-zho-hani-latn-1912}]

7.1.2.6 Supplied information

The citer may supply a value to a data element or data attribute in the citation that is not provided by the cited information resource.

Supplied information includes:

— additional information supplied by the citer; or

— missing information supplied by the citer.

Supplied information is expressed as a data attribute that contains the label "supplied".

If there is no original value, the data attribute applies to an empty value.

EXAMPLE 1 This example information resource is an untitled photograph and does not contain a title, therefore the missing information is supplied by the citer as the value for the "title" data element in explicit notation.

Title: [supplied: Judo fighters].

EXAMPLE 2 This example information resource does not contain the creator's name, therefore the missing information is supplied by the citer as the value for the "primary creator" data element in explicit notation.

Primary creator: [supplied: CLELAND, John].

If the original value exists, but there is additional supplied information, the data attribute applies to the original value.

EXAMPLE 3 This example information resource has an alternative title supplied by the citer, in explicit notation.

Title: Cutter's Way [supplied: Cutter and Bone]

In implicit notation, the "supplied" label may be omitted if there is no ambiguity.

EXAMPLE 4 This example shows how a title can be given to an untitled cartoon strip in implicit notation.

[You've taught me nothing except how to cynically manipulate the system]

EXAMPLE 5 This example shows how a title can be given to an untitled artwork in implicit notation.

[Untitled, Oil on canvas from the Oracle Bone period]

In cases where supplied information syntax may cause confusion, a separate sentence may be added to the reference to express this information.

7.1.3 Manifestation and item

7.1.3.1 General

The primary goal of a reference is to enable the reader to identify the cited work. There are always work-related attributes, such as the creator and the title. Usually citations contain also manifestation oriented attributes such as the publisher and the year of publication. Item-specific attributes such as the physical location are less commonly expressed in a citation.

This clause specifies guidance on manifestation and item level citations, and facilitates guidelines provided in 5.5. Guidance relating to performance events is provided in 7.13.3 and 8.7.7.

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7.1.3.2 Manifestation

A work may be published or available in multiple manifestations. A manifestation typically contains items of identical content and presentation, for instance:

— the content and physical presentation of a printed monograph are assumed to be identical across copies within the same edition and medium;

— the appearance and dimensions of a bronze-casted statue are assumed to be identical across casts of the same edition;

— the choreography and music presentation of a single musical performance are assumed to be identical within the same musical season.

When a published information resource is referenced, citing the manifestation is usually sufficient, since all items of the manifestation are supposed to be identical. By citing the manifestation, the author effectively enables the readers to verify the citation against an item they can retrieve using the manifestation metadata.

Manifestation-specific attributes and guidelines are provided below; see for instance 7.8.

EXAMPLE An author cites Hamlet with a manifestation instead of a particular item she has used.

SHAKESPEARE William. *Hamlet*. Paperback. Ann THOMPSON and Neil TAYLOR (eds.). The Arden Shakespeare – Third Series. London: Bloomsbury, 2006.

7.1.3.3 Item

On the other hand, it is appropriate and preferred to create citation of items when the cited item has significance or has item-specific attributes that need to be distinguished. For instance, item citations are widely used for information resources that relate to art, collectables and archival collections.

A specific item shall be cited if the item differs from all other items of the same manifestation, and the difference is relevant to the citation:

— the cited intellectual content is distinctive to that item (e.g. handwritten annotations);

— the item has a distinctive look and feel (e.g. colour images instead of black and white ones);

— the item has a specific historical significance (e.g. belonged in the collection of a particular person);

— the item belongs in an archival collection (see 8.12), which by its nature is a collection of unique items and not manifestations;

— the item is rare or unique, so that it is important to specify how to locate the item (Unpublished information resources fall under this category: see 5.6.);

— the item is bound by a temporary dimension (e.g. an event of a single occurrence).

In an item-level citation, attributes that distinguish the item from other items of the same manifestation shall be provided.

EXAMPLE 1 An author cites the first edition of *Hamlet,* and an item located at The British Library:

SHAKESPEARE William. *The tragicall historie of Hamlet Prince of Denmarke*. Book, quarto. London: Nicholas Ling and John Trundell, 1603. At: {The British Library, London. Shelfmark: C.34.k.1}.

If a cited information resource item is a mass-produced publication (as is the norm for modern printed information resources), the only distinctive attribute of an item, differentiating it from other items, may be its location in space and time. In this case, the location (see 7.12) and relevant dates (see 7.7) should be supplied in the citation.

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In the case of artworks, it is possible to differentiate between a work, an item, and an item in an exhibition.

EXAMPLE 2 This example demonstrates a citation to an artwork.

PICASSO Pablo. TRIPODE. Vase, glazed and painted. Height ~750mm. A.R. 125. Vallauris: Madoura, 1951.

EXAMPLE 3 This example demonstrates a citation to a particular item of an artwork.

PICASSO Pablo. TRIPODE. Vase, glazed and painted. A.R. 125. Item: edition 53/75. Height ~750mm. Vallauris: Madoura, 1951. At: The Attenborough Collection. New Walk Museum, Leicester.

EXAMPLE 4 This example demonstrates a citation to a particular item of an artwork, displayed in an exhibition.

PICASSO Pablo. TRIPODE. Vase, glazed and painted. A.R. 125. Item: edition 53/75. Height ~750mm. Vallauris: Madoura, 1951. Exhibited at: {New Walk Museum, Leicester. *Picasso Ceramics: The Attenborough Collection*. 2007-06-16/2007-09-30}. Catalogued in: {RAMIÉ, Alain. Picasso Catalogue of the edited ceramic works 1947-1971. Madoura: 1988}.

Details on the application of distinctive attributes of items and events are given in 7.13, throughout Clause 7, and in specific resource types in Clause 8.

7.2 Creator

7.2.1 General

The creator of the content of the cited information resource should be shown most prominently in the reference. A creator can be a person or an organization (see 7.2.4 and 7.2.5 for representation of names).

To facilitate identification of a particular information resource, or because of relevance to the purpose of the citation, the name of any editor, translator, narrator or other creator who has collaborated in the production of that information resource may be added after the title.

7.2.2 Roles

The creator's role varies from one type of information resource to another. If a cited information resource has more than one creator, its creators may be categorized as primary creators and subsidiary creators.

The data elements labels "primary creators" and "subsidiary creators" identify the data elements for "primary creators" and "subsidiary creators".

In the rendering system described in this document, primary creators are placed before the title of the cited information resource, while subsidiary creators are placed after the title, for the purposes of crediting primary creators and placing elements suited for discovery of the cited information resource earlier in the reference.

If there is no obvious creator, one should be selected from (but not limited to) the following roles, listed in order of preference:

a) creator of work: author, composer, songwriter, librettist, lyricist, mapping agency, surveyor, cartographer, system designer of software, patentee, patent applicant, inventor, artist, photographer, director of motion pictures, draughtsman, graphic designer, architect;

b) expresser of created work: conductor, performer of music, drama, etc., translator, software programmer, engineer;

c) reviser of work: compiler, editor, reviser;

d) creator of derivative work: engraver, photographer of another creator's work, copyist, arranger, reviewer, commentator, annotator;

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e) publisher of manifestation: publisher, online information provider, production company;

f) distributor of manifestation: distributor, issuing body, online host.

NOTE 1 Composer and librettist/lyricist, and patent applicant and inventor, both appear as creators of a work, although the former of the pair is given more prominence than the latter. See 8.9.3.2 and 8.10.3.3.

NOTE 2 For certain types of resources, such as serials, the "issuing body" is not only the distributor of the work, but is also associated with the creation of the content.

NOTE 3 In the previous edition of this document, translator was in d).

The data attribute label "role" identifies the data attribute of "role". The "role" data attribute value can be further annotated with other attributes, for instance "location" in the case where a distributor only distributes within a region.

The role name of a primary creator should be omitted, except when the role name is not obvious from context.

EXAMPLE 1 ORWELL, George.

The role name of a subsidiary creator should be made explicit (see 7.2.6.5).

EXAMPLE 2 George STUYCK (trans.).

EXAMPLE 3 Bi WANG (commentator).

Multiple roles may be expressed. The order of roles specified should be in order of the preference stated in this clause.

EXAMPLE 4 WILHELM, Richard (commentator, trans.)

7.2.3 Selection

If the cited information resource has multiple creators or contributors, a role with which only a single creator or contributor is associated may be preferred to any role with several agents (see also 7.2.6.3) depending on the information resource type.

EXAMPLE 1 AYMARD, M., (ed.) *Dutch capitalism and world capitalism*. (Studies in Modern Capitalism). Cambridge University Press, 1982, pp. 78–96.

The hierarchy in 7.2.2 still applies in the case where categories with most creators are identical in numbers.

EXAMPLE 2 BRITTEN, Benjamin. *Eight folk song arrangements for high voice and harp*. Osian ELLIS (ed.). Faber Music, 1980.

EXAMPLE 3 KING'S SINGERS. *Christmas with the King's Singers: six arrangements for mixed voices*. London: Chappell Music, 1981.

EXAMPLE 4 METHENY, Pat (guitarist); Lyle MAYS (pianist). *As Falls Wichita, So Falls Wichita Falls*. Manfred EICHER (producer). ECM, 1981.

See also 7.8.2.4 for distributors and online hosts and 8.15 for creator information in social media.

7.2.4 Personal names

7.2.4.1 General

Names of creators should normally be given in the form in which they appear in the cited information resource (see 7.2.4.2), transliterated or transcribed, if necessary (see 7.1.2.2).

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If names appear in different forms in cited information resources, one form of these names should be used, in order to guarantee uniform presentation of creators' names in the author list and alphabetical arrangement of references list.

EXAMPLE 1 BACH, C. P. E.

EXAMPLE 2 DÜRER, Albrecht.

EXAMPLE 3 MACBIRD, Bonnie.

Forenames or other secondary elements should normally be given after the surname, if at the beginning of the reference. However, since national practices should be followed, forename may sometimes be given first; for instance, in Icelandic names forename precedes the patronym or the matronym (and there is no surname).

EXAMPLE 4 ARNALDUR Indriðason.

EXAMPLE 5 GORDON, Dexter.

EXAMPLE 6 RAMON Y CAJAL, Santiago.

A public identity identifier (ORCID, ISNI or other) may be added after the name preceded by the identifier type. The identifier should be used if the name alone does not uniquely identify the author or if a less known name variant of the author has been used in the cited information resource.

The data attribute label "identifier" identifies the data attribute of "identifier". Individual public identity identifier schemes may be labelled according to their representation.

EXAMPLE 7 This example demonstrates identification of ISNI identifiers in equivalent forms.

GORDON, Dexter [identifier: ISNI 0000 0001 1948 6061].

GORDON, Dexter [ISNI: 0000 0001 1948 6061].

GORDON, Dexter [ISNI 0000 0001 1948 6061].

EXAMPLE 8 This example demonstrates identification of ORCID identifiers in equivalent forms.

DEXTER, David [identifier: ORCID 0000-0002-7974-9588].

DEXTER, David [ORCID: 0000-0002-7974-9588].

DEXTER, David [ORCID 0000-0002-7974-9588].

Treatment of secondary elements of names should follow the practice of the creator's homeland and the language used there. These practices are described in Names of persons: national usages for entry in catalogues[58].

According to these guidelines, the following elements are taken into account:

— England: A', Ab, Ap, D', De, Fitz, M', Mac, Mc, O', Van

— Spain: la, las, los, San, Santa, Santo

— The Netherlands: ver

— Italy: d', dagli, dai, dal, dalla, dalle, de, de', degli, dei, del', della, delle, di, la, San, Santo

— Portugal: Santo, São

— France: des, du, l', la, le, les, Saint, Sainte

— Sweden: d', de, du

— Germany: am, auf'm, aus'm, im, vom, zum, zur

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The following elements are ignored:

— Arabic-speaking countries: al, az, el

— Spain: de, de la, de las, de los, del

— The Netherlands: de, den, der, ’t, ten, ter, thor, van, van den, van der, vander, van’t

— Italy: de, de’, degli, dei, de li (in the names of members of noble families prior to 19th century)

— Portugal: d’, da, das, de, do, dos

— France: d’, de

— Sweden: af, van, von, von der

— Germany: de, von, von dem, von den, von der, zu, zu dem, zu den, zu der

EXAMPLE 9 FALLA, Manuel de. (A Spanish name)

EXAMPLE 10 LA FONTAINE, Jean de. (A French name)

EXAMPLE 11 DE LA MARE, Walter. (An English name)

EXAMPLE 12 KLEIST, Heinrich von. (A German name)

NOTE The guidelines listed above are to some extent language specific (Finland applies the same rules as Sweden for Swedish names used in Finland) but there is some variation; for example, not all Spanish-speaking countries in South America follow exactly the same principles as Spain.

When a creator name is converted to the script of the publication using a transliteration or transcription, and if this conversion can cause ambiguity, further information, such as the name represented in another script that allows disambiguation, should be provided.

The data attribute label "original form" identifies the original form of the value.

EXAMPLE 13 SHOJI, Osamu [original form: 東海林 修] (in a publication in English).

EXAMPLE 14 SHOJI, Sadao [庄司 禎雄] (in a publication in English).

The data attribute labels "transliteration" or "transcription" identifies a transliterated or transcribed form of the value, respectively.

EXAMPLE 15 SHOJI, Osamu [original form: 東海林 修; transcription: しょうじ おさむ] (in a publication in English)

EXAMPLE 16 SHOJI, Sadao [庄司 禎雄; しょうじ さだお] (in a publication in English).

EXAMPLE 17 東海林 修 [しょうじ おさむ] ("shoji osamu", in a publication in Japanese).

EXAMPLE 18 東海林 毅 [とうかいりん たけし] ("tokairin takeshi", in a Japanese document).

Other components of a creator name, such as prefix, suffix or generational name, should be placed in separate parts. In Latin script, the separation of parts is performed with comma (",").

EXAMPLE 19 CARTER, James E., Jr. *Why Not the Best?* Nashville: Broadman Press, 1975. ISBN 978-0-8054-5582-3.

When multiple creator names are present, and at least one of the names needs to be separated into parts, a value delimiter that does not cause ambiguity should be used to separate the names. In the case of Latin script, the semicolon (";") value delimiter should be used instead of the comma (",") meant for compatibility with traditional practice.

EXAMPLE 20 KING, Martin Luther, Jr.; CARSON, Clayborne. *The autobiography of Martin Luther King, Jr.* New York: Intellectual Properties Management in association with Warner Books, 1998.

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EXAMPLE 21 HERTLEIN, Leo George; GRANT, Ulysses S., IV (illustrator). *The Cenozoic Brachiopoda of Western North America*. Publications in Mathematics and Physical Sciences, vol. 3. Berkeley [US-CA]: University of California Press, 1944.

Creator name non-surname parts that are integral to the completeness of the name, such as nobility titles, should be provided as additional information to the name.

EXAMPLE 22 HENRY VIII [King of England]. *Assertio Septem Sacramentorum [Defence of the Seven Sacraments]*. London: Pynson, 1521.

EXAMPLE 23 宋 徽宗 趙佶 [CHAO Chi [HUI-TSUNG, Sung Emperor]]. 《蠟梅山禽》[Chimonanthus and Birds] [painting; calligraphy] [color on silk]. cc. 1082-1135. 83,3 cm × 53,3 cm.

EXAMPLE 24 AKIHITO [His Majesty The Emperor of Japan]. *Linnaeus and taxonomy in Japan*. In: Nature, vol. 448, pp. 139–140. ISSN 1476-4687. Available from: https://doi.org/10.1038/448139a.

EXAMPLE 25 明仁親王 [AKIHITO [Prince of Japan]]. 「ハゼ亜目魚類」[Gobiidae]. In: {益田 一 [MASUDA, H.], 尼岡 邦夫 [K. AMAOKA], 荒賀 忠一 [C. ARAGA], 上野 輝弥 [T. UYENO], 吉野 哲夫 [T. YOSHINO] (編 [eds.]), 『日本産魚類大図鑑』 [*The Fishes of the Japanese Archipelago*], pp. 230-276. 平塚市:東海大学出版会 [Hiratsuka: Tokai University Press], 昭63年 [1988].}

EXAMPLE 26 MASAHITO [Prince of Japan], Midori NISHIOKA, Hiroaki UEDA, Yo KATO, Ieharu YAMAZAKI, Kimie NOMURA, Haruo SUGANO and Tomoyuki KITAGAWA. *Frequent Development of Pancreatic Carcinomas in the Rana nigromaculata Group*. In: Cancer Res, vol. 55, no. 17 (1995-09-01). ISSN 3781-3784.

Data attribute labels for non-surname parts may be used to identify these parts of the name, such as "title", "regnal name", "style".

EXAMPLE 27 BENEDICT XVI [Pope]. *A Reason Open to God: On Universities, Education, and Culture.* J. Steven BROWN (ed.). Washington, D.C.: The Catholic University of America Press, 2013.

7.2.4.2 Variant forms

If a creator's name appears in different forms in information resources cited in a publication (e.g. Tchaikovsky, Chaikovski, Чайковский), the forms used in the cited information resources should be retained but only one form of the name, in brackets if necessary, should be used as the preferred form of the name. It is important that all references to the creator's works are grouped together in the bibliography of the publication.

The national variant form of the name used in the country of publication may be used as the first element, but the form used in the cited information resource should be included in the reference in brackets.

The data attribute label "variant form" identifies the variant form of the name. Name identifier may be added in order to facilitate identification and linkage to other forms of the name.

EXAMPLE 1 ЧАЙКОВСКИЙ, Пётр Ильич [CIAIKOVSKI, Peter Ilic].

NOTE 1 Peter Ilic Ciaikovski is one of the many Romanized name forms of the composer Пётр Ильич Чайковский.

EXAMPLE 2 JANSSON, Tove [GIANSON, Tobe] [ISNI 0000 0001 2147 8925].

NOTE 2 Tobe Gianson is one of the many variant name forms of the author Tove Jansson.

EXAMPLE 3 MAKARTNIJS, Pols [MCCARTNEY, Paul].

EXAMPLE 4 LENNON, John [LENONS, Džons] [ISNI 0000 0001 2117 4585].

EXAMPLE 5 HARRISON, George [Харрисон, Джордж].

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If the cited information resource provides multiple variants of a personal name in different languages or scripts, the variant form of the name in the script of the publication is preferred, but other variant forms of the name may be provided as associated information.

EXAMPLE 6 Louis Cha Leung-yung [金庸].

NOTE 3 Louis Cha Leung-yung is the English name of the author 金庸.

7.2.4.3 Additions

Additions to names may be retained or supplied to distinguish creators with the same first and last names. These include year of birth or death, rank, profession, office or status (academic, professional, etc.) or other disambiguation information, such as country or city of origin. The full personal name may be retained or supplied to distinguish creators with the same first and last names. Such information may be vitally important especially if the person does not have a public identifier such as ISNI, ORCID or VIAF.

Data attribute labels for additions to names may be applied to identify these additions.

Additions may be selected from external sources such as authority databases. They should be as globally understandable as possible. Abbreviations should be used with caution.

EXAMPLE 1 Disambiguation through year of birth and death.

CLARK, William [year of birth: 1770; year of death: 1838].

CLARK, William [1770–1838].

EXAMPLE 2 Disambiguation through profession.

CLARK, William [profession: medical doctor].

CLARK, William, MD.

EXAMPLE 3 BALFOUR, Robert J. (Disambiguation through full name.)

EXAMPLE 4 BALFOUR, Robert [Brits filosoof]. (Disambiguation through origin and profession.)

EXAMPLE 5 رابرت بالفور [فیلسوف بریتانیایی] (Disambiguation through origin and profession.)

EXAMPLE 6 BALFOUR, Robert [Rev.]. (Disambiguation through office.)

EXAMPLE 7 SMITH, John [Médecin] [1630–]. (Disambiguation through year of birth.)

7.2.5 Organization or group names

7.2.5.1 Form of name

In the reference, the full official name of the organization or group should be used. If the name is abbreviated in the cited information resource, the abbreviated form may be included after the full name as additional information.

Data attribute labels for form of names are applied to identify these additions, such as "abbreviated name" and "full name".

An official name may be available in multiple languages. There are often also unofficial translated, transliterated or transcribed versions. The form of name used in the reference should normally be the one which appears in the cited resource. When a name appears in different resources in different languages or scripts, use an authorized form of the name from the national bibliography or national authority file, transliterated if necessary (see 7.1.2.3).

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A public identity identifier (ISNI or other) may be added after the name, preceded by the identifier type. The identifier should be used if the official name alone does not uniquely identify the organization.

EXAMPLE 1 ACADÉMIE FRANÇAISE.

EXAMPLE 2 AKADEMIYA NAUK SSSR. [Академия наук России].

EXAMPLE 3 [CHINESE ACADEMY OF SCIENCES]. 中国科学院.

EXAMPLE 4 [AKADEMIE VON FINNLAND]. SUOMEN AKATEMIA.

EXAMPLE 5 COMMONWEALTH SCIENTIFIC AND INDUSTRIAL RESEARCH ORGANIZATION [CSIRO].

EXAMPLE 6 ROYAL SOCIETY. [ISNI 0000 0001 2248 733X].

ISNI, ORCID or VIAF identifiers should be expressed as HTTP URIs when possible.

EXAMPLE 7 HELSINKI UNIVERSITY. [ISNI 0000 0004 0410 2071].

HELSINGIN YLIOPISTO. [ISNI https://www.isni.org/isni/0000000404102071].

If the body is commonly known by its abbreviated name only, the abbreviated name should be used instead of the official name, which may be added after the abbreviated name in brackets.

EXAMPLE 8 UNESCO.

EXAMPLE 9 IETF [INTERNET ENGINEERING TASK FORCE].

7.2.5.2 Disambiguation of names

To distinguish between different bodies with the same name, identifier, place name or other relevant information should be provided as associated information to the name. Distinguishing terms such as "musical group" may be used with corporate names. Appropriate data attribute labels should be used for such purpose unless omission is allowed (e.g. in implicit notation).

EXAMPLE 1 TRINITY COLLEGE [Cambridge].

EXAMPLE 2 TRINITY COLLEGE [Dublin].

EXAMPLE 3 TRINITY COLLEGE [https://www.isni.org/isni/0000000404144036]

EXAMPLE 4 NOKIA [Corporation].

EXAMPLE 5 NOKIA [City].

EXAMPLE 6 HIM [Musical group].

EXAMPLE 7 Abba AB [Company].

EXAMPLE 8 Friendship 7 [Spacecraft].

7.2.5.3 Subordinate body

If the name of an organization implies subordination to a parent body of which it is an organ or administrative division, or if its full significance depends upon the inclusion of the name of the parent body, the latter should be given first in the reference. The data value hierarchical delimiter should be used to delimit the parent and subordinate bodies.

EXAMPLE 1 IMPERIAL CHEMICAL INDUSTRIES: Paints Division.

EXAMPLE 2 MINISTRY OF PETROLEUM AND MINERAL DOCUMENTS: Air Survey Department.

A subordinate body should appear under its own name if it has specific functions of its own and the full significance of its name is independent of that of the parent body.

EXAMPLE 3 ACADÉMIE FRANÇAISE. (not INSTITUT DE France: Académie française).

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EXAMPLE 4 WORLD HEALTH ORGANIZATION. (not UNITED NATIONS: World Health Organization).

7.2.5.4 Parent body

If the parent body is a state, a federation of states or a provincial, local or municipal authority, a name in general use should be given in preference to a full or correct official name. Foreign names may be given either in the language of the cited information resource or in the language of the publication.

EXAMPLE 1 FRANCE. (for République française).

EXAMPLE 2 HULL. (for Kingston-upon-Hull).

EXAMPLE 3 WESTMINSTER. (for City of Westminster).

7.2.6 Multiple creators

7.2.6.1 Up to five creators

If there are up to five creators of equal status, their names shall be given in the reference. The name that is given first should be in a form that is suitable to the alphabetical arrangement of a list, i.e. usually in inverted order (family name recorded first). The name(s) of the second and subsequent creators may be recorded in inverted order as well, or in direct order, if desired. A consistent system of recording such names shall be used throughout the list of references.

EXAMPLE 1 MURET, Pierre [https://www.isni.org/isni/0000000116916468] and Philippe SAGNAC.

EXAMPLE 2 BUNDESANSTALT FÜR BODENFORSCHUNG [https://www.isni.org/isni/0000000121554756] and UNESCO.

EXAMPLE 3 QU, H. Q.; C. POLYCHRONAKOS and TYPE I DIABETES GENETICS CONSORTIUM.

The order of the names in the cited information resource should be retained.

EXAMPLE 4 KELLY, John D.; Beatrice JAUREQUI; Sean T. MITCHELL and Jeremy WALTON (eds.).

7.2.6.2 More than five creators

If the cited information resource has six or more creators, all names should be listed if practical. Otherwise, only the names of the first five creators shall be given, followed by an appropriate phrase such as "and others" or "et. al.".

EXAMPLE 1 STONE, Richard A.; Alice M. McGLINN; Ranjay CHAKRABORTY; Duk Cheon LEE; Victoria YANG and others.

EXAMPLE 2 STONE, Richard A.; Alice M. McGLINN; Ranjay CHAKRABORTY; Duk Cheon LEE; Victoria YANG; Ayman ELMASRI; Erica LANDIS; James SHAFFER; P. Michael IUVONE and Xiangzhong Zheng.

7.2.6.3 Title first

For certain kinds of information resources (e.g. encyclopaedias) or if a resource is the co-operative output of many individuals, none of whom has a dominant role as creator, the title should be used instead of a creator. For references to information resources with several creators, it might be appropriate to give the title or series title first (see also 7.2.3 and 7.2.8).

EXAMPLE 1 *Encyclopaedia Britannica*.

EXAMPLE 2 *Transliteration*. Online.

EXAMPLE 3 *60 years of cool*. Blue Note Records, 1999. OBSBN01.

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7.2.6.4 Conferences

If no person or organization can be identified as the creator (see 7.2.3) of the proceedings of a single conference, the name of the conference should be treated as the first element.

EXAMPLE 1 *International Conference on Scientific information*. Washington DC, 1958.

A public identity identifier (ISNI or other) may be added after the conference name, preceded by the identifier type. The identifier should be used if the name alone may not uniquely identify the conference.

EXAMPLE 2 *International Congress of Philosophy.* [https://www.isni.org/isni/0000000123226342].

The proceedings of a series of numbered conferences should be treated as a serial (see 8.4) if the proceedings have a collective title.

7.2.6.5 Subsidiary creator

To facilitate identification of a particular information resource, or because of relevance to the purpose of the citation, the name of any editor, translator, narrator, performer, or other person who has collaborated in the production of that information resource may be added after the title.

The role description is placed after the creator's name. The role should be placed within parentheses "(" and ")" and could be abbreviated.

EXAMPLE 1 AYMARD, M. (ed.)

EXAMPLE 2 HAMILTON, Alastair; Sjouke VOOLSTRA and Piet VISSER (eds.)

EXAMPLE 3 GILBERT, Lewis (director).

EXAMPLE 4 KARAJAN, H. von (conductor).

EXAMPLE 5 VIENNA PHILHARMONIC (performer).

The role of the person should be placed in the reference such that the relation between that role and the whole or part of the information resource is clear.

EXAMPLE 6 BAARD, H. P. *Frans Hals*. Translated from Dutch to English. George STUYCK (trans.).

EXAMPLE 7 BACH, C. P. E. *Sonate G-moll für Violine und obligates Cembalo*. Anne Marlene GURGEL (Hrsg.).

EXAMPLE 8 FOWLER, H. W. [ISNI 0000 0001 2101 5357]. *Fowler's dictionary of modern English usage*. 4th ed. Jeremy BUTTERFIELD (rev.).

EXAMPLE 9 WELLES, Orson. (director). [https://www.isni.org/isni/0000000120968527]. *Macbeth.* [motion picture]. 1948.

7.2.6.6 Originators of multiple editions

If a new edition, abridgement or updated version of a cited information resource is produced by a new creator, the name of the first creator should be used if it appears as a creator in the cited resource.

EXAMPLE 1 PARKER, T. J. and W. A. HASWELL. *A text book of zoology*. 6th ed. vol. 1 revised by Otto LOWENSTEIN; vol. 2 revised by C. FORSTER-COOPER. London: Macmillan, 1940.

EXAMPLE 2 GORDON, Dexter [https://www.isni.org/isni/0000000119486061]. Settin' the pace. In: *Long Tall Dexter, the Savoy Sessions* [LP], SIL 2211, side B, track 5. Savoy, 1976. Arista Records Inc. (distributor). Originally released on Savoy, MG 9003, 1947.

7.2.6.7 Derivative work creator

For derivative works, the original information resource should be referenced within the reference to the derivative work as an internalized reference.

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The creator and the title of the original information resource should be mentioned.

EXAMPLE 1 王弼 [WANG Bi]. 老子注 [*Commentaries on Laozi*]. 老子道德經註疏 [Commentary on: LAOZI. Tao Te Ching].

EXAMPLE 2 GARDNER, Martin (ed.). *The Annotated Alice: The Definitive Edition*. Commentary on: CARROL, Lewis. Alice's Adventures in Wonderland. New York: W. W. Norton & Company, 1999.

7.2.7 Pseudonyms

If the cited information resource has been issued under an assumed name, normally this name only should be given in the reference.

A public identity identifier (ORCID, ISNI or other) may be added after the assumed name, preceded by the identifier type.

EXAMPLE 1 CARROLL, Lewis [https://www.isni.org/isni/000000012137136X].

EXAMPLE 2 MAUROIS, André.

If the creator's real name is known although not included in the cited information resource, the name may also be supplied.

The real name should be provided as a data attribute value. Appropriate data attribute labels that indicate the nature of the pseudonym, such as "pseudonym of", "stage name of", "pen name of", "nickname of", and "online handle of", may be used to identify such names.

EXAMPLE 3 BLAKE, Nicholas [pseud. of Cecil Day LEWIS].

EXAMPLE 4 ORWELL, George [pseud. of Eric Arthur BLAIR].

EXAMPLE 5 Æ [pseud. of RUSSELL, George William].

EXAMPLE 6 LASSILA, Maiju [oik. UNTOLA, Algot].

EXAMPLE 7 BELL, Acton [pen name of: BRONTË, Anne]. *The Tenant of Wildfell Hall*. London: Thomas Cautley Newby, 1848.

EXAMPLE 8 DENVER, John [stage name of: DEUTSCHENDORF, Henry John, Jr]. *Back Home Again*. RCA Records, 1974.

EXAMPLE 9 PELÉ [NASCIMENTO, Edson Arantes do]. *Pelé: The Autobiography*. New edition. Simon & Schuster, 2007.

EXAMPLE 10 通玄真人 [posthumous style of: 文子 [Master Wen]].《通玄真經》[True Scripture of Understanding the Mysteries]. 唐 天寶 元年 [initial year of the Tang Tianbao reign, 742].

7.2.8 Anonymous works

For anonymous works, the phrase "Anonymous" or equivalent, or its abbreviation, in the language of the reference may be used instead of a creator's name.

If the cited information resource specifically mentions the creator being "anonymous", the name should be provided.

EXAMPLE 1 ANONYMOUS. *Diary of an Oxygen Thief*.

If the cited information resource does not provide a creator's name, the name "anonymous" should be provided in brackets to indicate it is supplied information.

EXAMPLE 2 [ANONYMOUS]. *I Am Part of the Resistance Inside the Trump Administration*.

EXAMPLE 3 [ANON.] *Primary colors.*

EXAMPLE 4 [ANON.]. [*Warsaw ghetto uprising*]. Photograph.

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EXAMPLE 5 WANG, Xizhi. *Rubbing of Lanting Xu*. Rubbing; ink on paper; album of 15 leaves. [ANON.] (rubber).

If the creator's name is known, it should be supplied, but in square brackets.

EXAMPLE 6 [CLELAND, John]. *Memoirs of a Woman of Pleasure*.

NOTE For anonymous works cited in the numeric system (see A.3) or running notes (see A.5), the "title first" rule (see 7.2.6.3) can be applied where the author element is omitted.

7.3 Title

7.3.1 Preferred form

The wording and spelling of the title should be given in the form in which it appears in the cited information resource (see Clause 6).

The data attribute label of "title" identifies the title of the cited information resource.

EXAMPLE 1 title: *Unknown soldier.*

Additional information such as the format or date may be provided, if necessary.

A work identifier (e.g. ISAN) may be added after the title, preceded by the identifier type. The identifier should be used if the title alone does not uniquely identify the cited resource.

EXAMPLE 2 *Unknown soldier.* Motion picture. 2017. [ISAN 0000-0005-007D-0000-Q-0000-0000-X].

7.3.2 Alternative forms

If alternative forms of title are given in the cited information source, the most prominent should be used. If several forms are given equal prominence, the form used should be one of the following, listed in order of preference:

a) a title in the language and script mainly used in the cited information resource;

b) the title given prominence by the order of titles or the layout;

c) a title in the language of the main target audience; and

d) other forms of title.

EXAMPLE *Eric, or, Little by little: a tale of Roslyn School*.

7.3.3 Popular or original title

If the information resource used is widely known by, or was originally issued under, a title different from that of the cited version, the alternative may also be given. The alternative title shall be provided as supplied information.

An appropriate data attribute label, such as "original title", "alternative title" or "popular title", identifies the nature of such title.

EXAMPLE 1 CENTRAL ADVISORY COUNCIL FOR EDUCATION (ENGLAND). *Children and their primary schools* [*Plowden Report*].

EXAMPLE 2 *Cutter's Way* [*Cutter and Bone*]. Motion picture.

EXAMPLE 3 GREAT BRITAIN. House of Commons. *Official Report. Parliamentary debates* [Hansard].

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7.3.4 Long title

A title that is inconveniently long may be shortened by the omission of some words, but initial words, other than the definite or indefinite article, should not be omitted, nor should the sense be altered. The omitted words, except for omitted articles, should be replaced by an ellipsis indicated by three dots (for abbreviation of periodical titles, see 8.4.3).

A title should only be truncated if the truncated title enables unique identification of the cited information resource at the time of citation. Generic titles, even if long, shall not be truncated.

NOTE It is not possible to specify a generic logic or method for truncation, which diminishes the usefulness of title shortening.

EXAMPLE 1 WYLD, James. *Map of the countries lying between Turkey and Birmah, comprising Asia Minor, Persia, India, Egypt and Arabia and including the Black, Caspian and Red Seas*. London: James Wyld, 1852.

WYLD, James. *Map of the countries lying between Turkey and Birmah...* . London: James Wyld, 1852.

EXAMPLE 2 BLOUNT, Roy. *Alphabet juice: the energies, gists and spirits of letters, words and combinations thereof; their roots, bones, innards, piths, pips, and secret parts, tinctures, tonics, and essences; with examples of their usage foul and savory.* Farrar, Straus and Giroux, 2008.

BLOUNT, Roy. *Alphabet juice: the energies, gists and spirits of letters, words and combinations thereof...* . Farrar, Straus and Giroux, 2008.

or

BLOUNT, Roy. *Alphabet juice.* Farrar, Straus and Giroux, 2008.

7.3.5 Additional title parts

Subtitles shall be included if they are required for the identification of the cited information resource (see 7.3.6), otherwise they may be omitted. The data attribute label "subtitle" identifies the subtitle.

EXAMPLE 1 *Etheldreda's Isle: a pictorial map of the Isle of Ely to commemorate the 1300th anniversary of the founding of Ely's conventual church*.

If the cited information resource consists of two or more parts, the full title of the part used shall be included.

EXAMPLE 2 *Frankenstein; or, The Modern Prometheus*.

EXAMPLE 3 *Ici, sous l'étoile polaire. 2. Les gardes rouges de Tampere.*

7.3.6 Ambiguous or incorrect title

Elucidation of a title that is ambiguous or fails to indicate clearly the content of the cited information resource may be supplied in brackets after the title. If a title contains an obscure abbreviation, the full form, if known, may be supplied as data attributes.

EXAMPLE 1 *Statistical digest of the war*. [1939–1945].

EXAMPLE 2 *Florestan*. [JS 82].

Can be described as:

Florestan. [Jean Sibelius's compositions without opus numbers, 82].

7.3.7 No title

If there is no clear title in the cited information resource or in embedded/external metadata, a popular or traditional title may be given, if one exists.

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Otherwise, a title should be provided as supplied information, giving a description of the special subject matter.

An appropriate data attribute label, such as "description", identifies the nature of such information.

EXAMPLE 1 [description: Wildlife sanctuaries of Trinidad].

[Wildlife sanctuaries of Trinidad].

The nature of the cited information resource, such as its medium (e.g. pamphlet, map, plan, drawing, index, engraving, photograph, dataset), should be provided to assist identification.

EXAMPLE 2 *[Wildlife sanctuaries of Trinidad]*. Map.

7.3.8 Translated title

A translation of the title (and/or its transliteration or transcription) of the cited information resource in the language of the publication may be supplied immediately after the preferred title.

EXAMPLE 1 *Братья Карамазовы* [*The Brothers Karamazov*].

EXAMPLE 2 *Les parapluies de Cherbourg* [*The Umbrellas of Cherbourg*].

EXAMPLE 3 *Mustataustainen omakuva* [*Self-Portrait, Black Background*].

In accordance with 7.1.2.3, both translated title and its transliteration or transcription can be given.

EXAMPLE 4 源氏物語 [*The Tale of Genji; Genji monogatari*].

EXAMPLE 5 天龍八部 [trans.*: Demi-Gods and Semi-Devils; translit.: tin1 lung4 baat3 bou6*].

NOTE The publication containing these references is in English.

7.3.9 Titles of translated works

The original title of a work, its translation, transliteration or transcription, may be supplied immediately after the title used in the cited information resource.

A data attribute label of "original title" identifies the original title.

EXAMPLE 1 *The Brothers Karamazov* [original title: *Братья Карамазовы* [language: ru]].

The Brothers Karamazov [*Братья Карамазовы*].

EXAMPLE 2 *The Brothers Karamazov* [*Братья Карамазовы* [translit.: *Brat'ya Karamazovy*]].

The Brothers Karamazov [*Brat'ya Karamazovy*].

EXAMPLE 3 *The Umbrellas of Cherbourg* [*Les parapluies de Cherbourg*].

7.3.10 Representation

The title element can have a key role in enabling the users to locate the cited information resource. Therefore, the title may be emphasized (see 7.4.2.3). Emphasis within a host document in Latin script is typically performed with italics.

EXAMPLE 1 *Frog and Toad are Friends.*

For translated, transliteration or transcribed titles provided as additional information, emphasis should be applied to these values in order to differentiate between this title-derived information and other additional information.

EXAMPLE 2 *Ranelot et Bufolet, une paire d'amis* [*Frog and Toad are Friends*].

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Emphasis practices should follow conventional practice for the written script.

EXAMPLE 3 《淮南子》[*Huainanzi*; *The Writings of the Huainan Masters*].

EXAMPLE 4 『日本書紀』 [にほんしょき; *Nihon Shoki; The Chronicles of Japan*].

NOTE The title data element is emphasized in citation methods described in Annex A.

7.4 Component parts

7.4.1 General

Citable information resources can be component parts of host resources, which are also citable information resources.

Component parts include articles in periodicals, newspapers and Web sites, individual tracks (and their lyrics) in LPs and CDs, poems and short stories published in books, episodes in TV series, conference presentations published in proceedings, and so on. A component part may itself consist of citable component parts, such as images in an article.

A cited component part may consist of content that accounts for an arbitrary span within a host information resource. For instance, a book may be a single volume of a series, and an appendix may be a component of a single annex published in a monograph.

The relation between component and host information resources is considered to be a relation between manifestations. For instance, a work can be first be published separately, and later on be included in an anthology. In that case, the intellectual content of the work has not changed between the two publications, but its presentation has, making it a new manifestation.

The location of an item within a collection or archive is not modelled as a component part: the collection is not considered to be an information resource itself. Instead, the collection or archive is modelled as a location of the item, for the purposes of access. Citation guidelines for collections and archives are described in 7.12.

The location of a performance event within a performance event is modelled as a component part, since both host and container are the same class of entity. This includes components of broadcasts, as well as concerts and performances (8.7.6).

7.4.2 Representation

7.4.2.1 General

The data element label of "In", or its equivalent in the language of the publication is used to identify the location of a cited information resource within a host information resource.

The phrase pattern of "In: {host information resource}, {locality}" allows the citation to specify the citation of the host information resource in "{host information resource}", and the location of the cited information resource represented within the host information resource in "{locality}". The pattern requires the usage of context separators to wrap the host information resource as an internalized citation. The locality portion may be omitted.

EXAMPLE 1 In: Wikipedia.

If the host information resource is a serial, a connector phrase is not required unless the reference has to be machine understandable.

EXAMPLE 2 MADDOX, Brenda. *DNA's double helix: 60 years since life's deep molecular secret was discovered*. Online. The Guardian. ISSN 1756-3224.

NOTE 1 Serials include, for example, periodicals, journals, newspapers, annuals, etc.

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