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Yi-Long Huang, Bingyu Zheng

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New Frontiers of Electronic Textual Research in the Humanities: Investigating Classical Allusions in Chinese Poetry through Digital Methods

YI-LONG HUANG and BINGYU ZHENG

Abstract By investigating two literary allusions, *chuzhi* 蜍志 and *lüdai* 呂袋, found in poems from the Ming-Qing period, this article seeks to discover new ways to combine traditional philological techniques and digital research methodologies in the study of Chinese literature. The article illustrates several procedures through which scholars today can use digitized versions of large compendia such as the *Peiwen yunfu* 佩文韻府 (Thesaurus Arranged by Rhymes) to efficiently and rapidly find solutions to their questions regarding obscure historical or literary references. In addition, through a thorough study of one of the poems composed by Yiquan 宜泉, a close friend of Cao Xueqin 曹雪芹, and an individual called "Fourth Brother Li" that the poem was dedicated to, this article also shows the special power of electronic textual research to analyze the different ways social networks were formed and how they functioned during this era.

Keywords electronic textual research, big data, digital humanities, historiography, classical allusions

In the past couple decades, debates about the use of digital humanities and big-data analytical methods in Chinese literary studies have rapidly increased, both in China and in the West. In particular, my own methodology of electronic textual research (aka *e-kaoju*, e 考據; hereafter ETR) has been much discussed, both positive and negative, since its arrival more than a decade ago.[1] Many people have unfortunately assumed that ETR is nothing more than conducting

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keyword searches in databases. In doing so, they have overlooked the purpose of this methodology and oversimplified its application.

When using ETR, we should utilize digital resources in conjunction with traditional methods of gathering sources rather than relying only on database searches. Typographical errors are unavoidable in the digitization process of the original texts, and the editions of the texts selected to be digitized may also not be ideal. Hence, it is imperative for scholars to understand these limitations and go back to the original sources as much as possible for verification. Also, to utilize digital resources properly, it is important for scholars to adopt an iterative method in their searches based on precise and insightful questions, being meticulous and critical in selecting search words rather than throwing terms into search engines blindly. One search may bring up results that lead to new clues that form the basis for the next search. It is important that, through this process, a scholar construct a more and more lucid knowledge map and learn how to use this virtual map to its full potential in conjunction with ETR.

All in all, ETR is a methodology that allows researchers to investigate sources more systematically and exhaustively and to conduct more in-depth philological studies. Though based on traditional research techniques, it can be applied more generally to the vast array of digital resources that researchers today possess, attempting to harmonize new and traditional approaches to the humanities. Its goal is open new frontiers and produce better results in academic studies in this new digital landscape.

During my work on my two previous monographs, *Two-Headed Snakes: The First Generations of Chinese Catholic Converts in the Late Ming and Early Qing* (2005) and *A Duet: Discourse between Redology and Qing History* (2014), I have benefited greatly from ETR. I have not, however, dedicated a monograph to discussing this research method on its own. In recent years, more and more people in academia have shown interest in exploring the potential advantages that digital humanities may provide, yet still few case studies present successful models for the application of big data. In this article, I introduce two fascinating cases that I encountered in my prior research in order to elucidate and showcase the unique possibilities of ETR to scholars working in the fields of Chinese literature and history.

The Case of *Chuzhi*

During my research of the history of Catholicism in China, I encountered the figure of Han Lin 韓霖 (c. 1590–1649), who was a student of the famous late Ming Catholic convert Xu Guangqi 徐光啟 (1562–1633), and a Christian himself as well. Han was a well-known military tactician, and he had close interactions with Gonçalo Teixeira Correa (d. 1632), a Jesuit missionary and a

military adviser for the Portuguese who was transporting Western cannons to China. In the first month of Chongzhen 17 (February 1644), Grand Secretary Li Jiantai 李建泰 (d. 1649) led Ming troops to attack the rebel Li Zicheng 李自成 (1606–45), and he invited his friend Han Lin to serve as an adviser. Han, however, surrendered to Li Zicheng and worked for the government of the rebellious Shun dynasty. When Li Zicheng was defeated, Han lived as a recluse for a short period and was later killed along with his two sons in the chaos of war.[2]

While investigating Han Lin's background, I came across a poem composed by Sun Xiling 孫錫齡 (c. 17th century), who came from the same town as Han Lin, titled "Zhuizeng Yugong Han fuzi" 追贈雨公韓夫子 (In Memoriam of Sir Han Yugong, see fig. 1). The poem is as follows:

	His poetic exchanges once resonated throughout the capital,	一時酬唱沸都城
2	But who has the authority to evaluate his reputation?	誰氏陽秋是定評
	Volumes of verses that could encompass two oxen, all lamentably lost in turmoil,	詩卷兩牛悲溷劫
4	Retiring to the garden of his three paths, listening serenely to frog's calls.	園池三徑聽蛙鳴
	Carrying the soil like Hou Ba, I began building his grave.	侯芭負土墳初起
6	Seeking to emulate Song Yu, yet I could not summon his soul.	宋玉招魂賦未成
	Gazing forlornly at Jiuyuan, seeking vainly to bring him back.	悵望九原如可作
8	Wondering if he would be willing to pass the rest of his days like *chuzhi*.	肯將蜍志羨餘生
		(Tao and Liu, *Jiangzhou zhi*, 3.48)

This poem uses several classical allusions to summarize Han Lin's life and portray the poet's grief for Han's passing, most of which I was able to decipher during my research. In the third line, Sun highlighted Han's prolific poetic output as "encompassing" "two oxen," a reference to Li Bo's 李白 (701–62) poem "Zuihou zeng Wang Liyang" 醉後贈王歷陽 (To Wang Liyang after Inebriation), where the famous Tang poet described how his friend Wang's voluminous works could be "tailored to fit two oxen's waists" (詩裁兩牛腰).[3] In

Figure 1. "In Memoriam of Sir Han Yugong" by Song Xiling (in Tao and Liu, *Jiangzhou zhi*, 3.48)

the next line, Sun characterized Han's reclusion as him retreating to the "three paths" (*sanjing* 三徑) to "listen to the frogs' calls" (*ting waming* 聽蛙鳴). The term *three paths* is a common literary allusion to reclusion, originating in the Jin dynasty text *Sanfu jue lu* 三輔決錄 (Records of Sanfu) in the biography of the Eastern Han official Jiang Xu 蔣詡 (69–17 BCE), who abandoned his post to return to his home, which had three paths that only his closest friends could use to come visit him.[4] Meanwhile, "listening to the frogs' calls" may be a reference to the Qi dynasty hermit Kong Zhigui's 孔稚珪 (447–501) biography in the *Book of Southern Qi*, where it is recorded that in his retreat he would often hear the frogs croaking, and he preferred these sounds to the cacophony of drums and horns.[5] In the following couplet, Sun uses the story of the Eastern Han scholar Hou Ba 侯芭 personally burying his master Yang Xiong 揚雄 (53 BCE–18 CE) to allude to the poet's own role in providing financial assistance to Han's widow for her husband's funeral.[6] Sun then brings up Song Yu 宋玉 (298–222 BCE) and his renowned rhapsody (*fu* 賦) "Summoning the Souls" ("Zhaohun" 招魂) to show the poet's remorse for himself being unable to compose a proper eulogy for his friend at the time.

I was puzzled, however, by one allusion in the very last line of the poem when I was finishing the first draft for *Two-Headed Snakes*. I could not figure out exactly what the term *chuzhi* 蛘志 was supposed to reference, even after

exhaustive investigations using both several reference books and various online tools. When the first edition of my book was published in 2005, I could only indicate in a footnote that I believe that this line could probably be interpreted as the poet "wondering if Han would be willing to live the rest of his life in peace just like the toads in his garden ponds."[7]

Afterward, I sent out several copies of my book to my colleagues to ask for their comments. One day, I received a handwritten letter from Professor Yu Ying-shih, who corrected me by pointing out that *chuzhi* is a reference to a story from *Shishuo xinyu* 世說新語 (A New Account of the Tales of the World), in which the Jin dynasty scholar Yu He 庾和 (c. 329–70) is recorded as having stated the following:

> Yu He said: "Even though Lian Po and Lin Xiangru have passed away for over a thousand years, their indomitable spirits continue to command such veneration that their vitality could still be felt. Even though Cao Chu and Li Zhi are still alive, their weak willpower make them appear as if they are already denizens of the netherworld. If all men are like them, then 'order will prevail by knotting cords.' But I am afraid they will just become fodder for wild beasts!"[8]
> 庾道季曰：廉頗、藺相如雖千載上死人，懍懍恒如有生氣；曹蜍、李志雖見在，厭厭如九泉下人。人皆如此，便可結繩而治，但恐狐狸猵狢噉盡。

In his annotations to this entry, Liu Xiaobiao 劉孝標 (462–561) analyzed Yu He's statement as thus: "If all people are as dull-witted and honest as Cao Chu and Li Zhi, then there would be no evil person in the world, and they could be ruled without much effort. However, men like these two lack talent and intellect, and their merits and achievements have all been lost to time. They would soon be swallowed by cunning tricksters, leaving behind no worthwhile reputation to speak of." According to this interpretation, Sun Xiling was using *chuzhi* to refer to mediocre men who could fulfill their duties during times of peace but lacked enterprise and would never stand out in any way. In context of the last line of his poem, the poet may be asking rhetorically whether Han Lin, if he were to come back to life, would be willing to live the rest of his life as undistinguished as Cao and Li, who did enjoy prosperous, if mediocre, careers.[9] It is possible that Sun is here inferring that Han was not willing to simply settle for a life of seclusion and quietude when he went into reclusion, especially given his close relationships with Han Zhaoxuan 韓昭宣 and Li Jiantai 李建泰 (both d. 1649), who were both leaders of anti-Qing movements. However, there is no evidence so far showing a concrete link between them.[10]

After receiving Professor Yu's letter, although I was humbled by his superior scholarship, I also came to realize that finding individual pieces of

information regarding this or that literary allusion in the vast sea of Chinese classical knowledge is akin to finding a needle in a haystack. However much learning one could accumulate through years and years of hard work, it is still inevitable that there will be blind spots in our scholarship. This case led me to begin ruminating on the advantages and limitations of research using digital resources. Objectively speaking, for many scholars in the twenty-first century, it is unlikely that they would be familiar with rather obscure figures like Cao Chu and Li Zhi, unless they are specialists in medieval China or they happen to learn about them by chance. Hence, it is difficult to make the mental leaps required to figure out that the term *chuzhi* is actually a combination of these two figures' given names.[11] Moreover, at the time when I was writing *Two-Headed Snakes*, it would have been difficult to find any reference books or search engines that can provide the exact meaning of *chuzhi*. Thus, even though this book was supposed to be a pioneering work demonstrating the usefulness of ETR, with respect to the case of *chuzhi*, it clearly showed its weakness.

In the revised edition that was published in 2007, I corrected this mistake and thanked Professor Yu for his instruction. Because I had also uploaded the list of errata and corrigenda of this book onto the web server of the College of Humanities and Social Sciences at the National Tsing Hua University, one can now easily find what *chuzhi* refers to by searching the term on Google or Baidu.[12] Moreover, because I had talked about this example in several lectures, some of which have also been uploaded online, and because I used this as a case study in many of the classes or workshops on ETR that I taught in Taiwan, mainland China, and Hong Kong, more and more people have found the errata list online, which caused it to become the highest ranked website when you search for *chuzhi* in many search engines for a time (see fig. 2).[13]

Thanks to rapid developments in digital research in recent years, there are now over ten billion characters' worth of pre-Qing texts that have been fully digitized. Although there is still much work that needs to be done in this area, enough progress has been made for scholars to use statistical methods on many research topics. These advancements in technology led me to look for a more systematic method to look up references and allusions in classical literature. After combing through several databases, I have found that the story of Cao Chu and Li Zhi was clearly familiar to many people in the past. For example, if you look up these two figures in the Database of Chinese Classic Ancient Books (*Zhongguo jiben guji ku* 中國基本古籍庫) and the Database of Chinese Local Records (*Zhongguo fangzhi ku* 中國方志庫), you can find over two hundred relevant items. Through Academia Sinica's Scripta Sinica database (*Hanji quanwen ziliao ku* 漢籍全文資料庫), you can even find a memorial from Choson Korea that was submitted by Inspector General Song Sang-ki 宋相琦

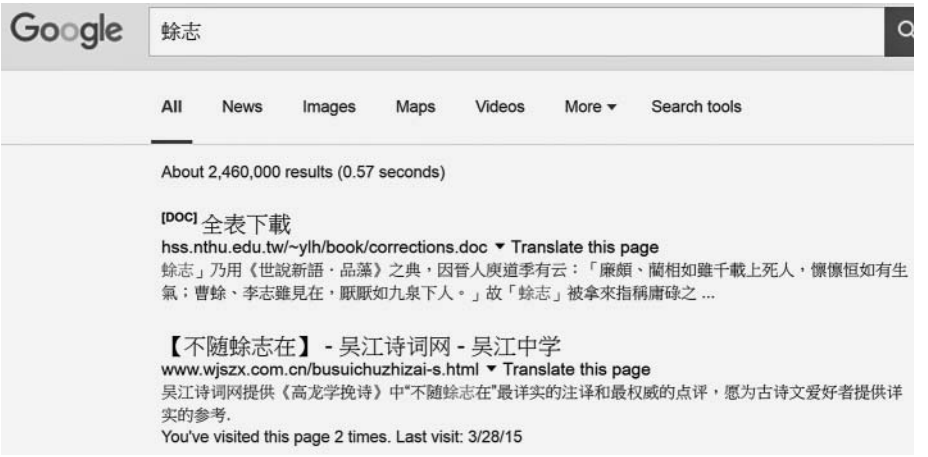

Figure 2. The first page for Google search results on *chuzhi* in September 2016

(1657–1723) to King Sukjong 肅宗 (r. 1674–1720) in 1705, which contains the following:

> Today's ministers are all lacking in ambition. They cannot avoid the ridicule of being compared to the likes of Li Zhi and Cao Chu.[14]
> 今日諸臣，志氣厭厭，不免李志、曹蜍之譏。

This statement shows that even political leaders and intellectuals in Korea were quite familiar with this reference.

However, if a researcher does not know that *chuzhi* refers Cao Chu and Li Zhi, when they input *chuzhi* as a keyword in the Database of Chinese Classic Ancient Books, they would find that none of the twenty-eight results could really help them get a solid grasp on the meaning of this term. It is likely that scholars in the past were already very familiar with this reference, and hence many of them did not bother to explain its meaning in detail. Even if you search for this term in the original source, the *Shishuo xinyu*, you would not get any results, as the two characters *chu* and *zhi* were not combined to form a single word in that book. In other words, we can only roughly infer from these twenty-eight search results that past literati were well acquainted with story behind this term.

In such a case, we could adapt the way we search for this term. I have tried to search the Database of Chinese Classic Ancient Books for "chu+zhi" ("蜍+志") instead, which, according to the way the database was designed, should bring up every instance in which the characters *chu* and *zhi* appear within twenty characters of each other. This is a search technique that can be applied whenever we find ourselves facing a bottleneck after inputting a regular keyword into a search engine. By doing so, we would need to take more time to sort through a longer

list of results, but it also increases the odds of us finding what we are looking for. In this case, by adopting this method, the database produces 212 search results in total, within which 113 cases contain the names of Cao Chu and Li Zhi, many of which also directly reference the *Shishuo* story.

While I was investigating all of these search results, I found the book *Peiwen yunfu* 佩文韻府 (Thesaurus Arranged by Rhymes). This thesaurus and rhyme dictionary, completed in 1712 (Kangxi 51) after seven years of compilation, became the primary reference book for Qing scholars to find suitable classical allusions and ornate expressions to use in their writings. Together with its supplemental text (*Yunfu shiyi* 韻府拾遺), which was published in 1720 (Kangxi 59), they contain over one million entries on phrases and allusions.[15] For a modern scholar, however, this massive compendium may be quite difficult to use to search for specific items, especially considering that it is organized according to the last character of every word, and that one would need to be quite familiar with classical rhymes to use it. Thanks to its digitization, however, we can make much better use of this text by applying ETR, which should help us solve a lot of problems regarding classical allusions.

Before we begin, it is useful to understand how the *Peiwen yunfu* is constructed. This thesaurus arranges all of its entries according to the 106 rhyme groups of the "Pingshui" system (*pingshui yun* 平水韻), following the sequence of the classic four tones: *ping* 平 (level), *shang* 上 (rising), *qu* 去 (departing), and *ru* 入 (entering). All the words are classified according to the rhyme of their last character. At the start of every category, *Peiwen* would first provide short notes on the pronunciation (using the *fanqie* 反切 method) and the meaning of the character. It would then list all the words, idioms, and phrases that contain that character at their final position (as opposed to a regular dictionary, where you would find under each character all the words that has it at the beginning). These entries are further classified under the subcategories of *yunzao* 韻藻 (terms that were originally found in the Yuan dynasty thesaurus *Yunfu qunyu* 韻府群玉 and the Ming dynasty thesaurus *Wuche yunrui* 五車韻瑞, which provided the foundation for the compilation of *Peiwen yunfu*), *zeng* 增 (additions made by the compilers of *Peiwen* to the two previous dictionaries), *duiyu* 對語 (double-verse rhymes), and *zhaiju* 摘句 (selected quotations from poetry, unlabeled) (see fig. 3). In each subcategory, the entries are listed by the number of characters they contain, from the shortest to the longest. To utilize digitized versions of the *Peiwen yunfu* efficiently through ETR, it is helpful to know the basic organization of this text.

For the case of *chuzhi*, we can first try to refine our search in a database like the Database of Chinese Classic Ancient Books by confining it to *Peiwen yunfu* and its supplement only. If we cannot find an answer to our problem, we can try

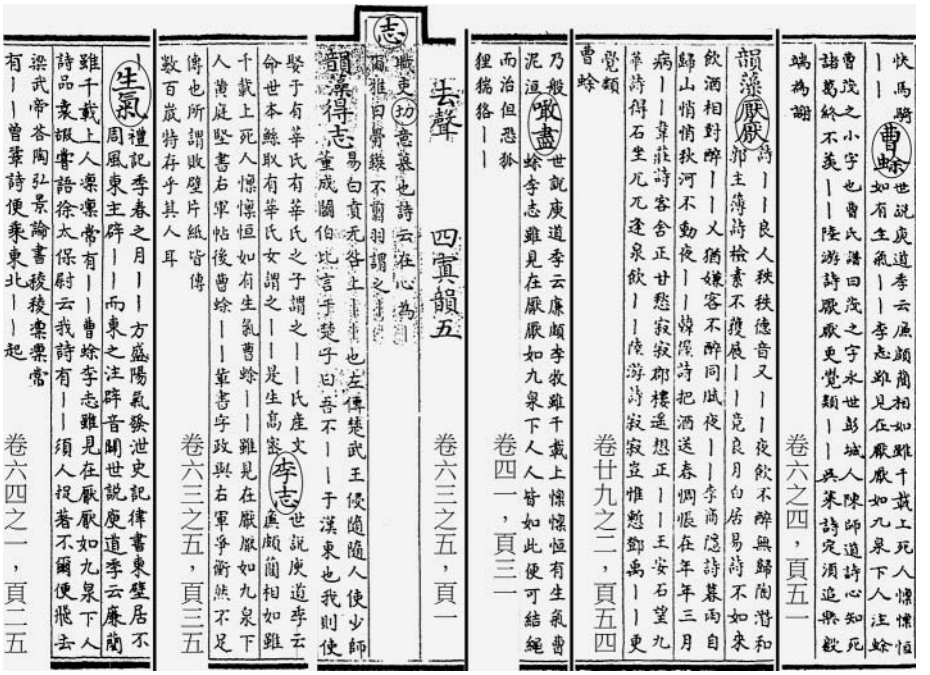

Figure 3. Information regarding Cao Chu and Li Zhi in the *Peiwen yunfu*

to input "蜍+志" ("chu+zhi") instead. Using these new digital tools, we can immediately find in the *Peiwen yunfu* five results that contain information on Cao Chu and Li Zhi that can help us generally understand the story behind the meaning of *chuzhi* (see fig. 3). Alternatively, we can also go through every entry under the character "zhi" 志 in this thesaurus. If we search for "志??切" ("zhi?? qie") in the database with *Peiwen yunfu* selected, we will be brought to the page where the pronunciation (*qie* 切) of the character *zhi* is given, after which all the entries that are under this character begin.[16] By going through every word in this section, we would be able to find the "Li Zhi" entry eventually and learn that *chuzhi* is a reference to Cao Chu's and Li Zhi's mediocrity. These strategies allow faster and more comprehensive access to this information than traditional methods. Hence, with the exception of extremely obscure allusions, we can quickly solve many research problems by utilizing digitized versions of *Peiwen* and its supplement, which give us easy access to over a million literary references that have been collected by Qing scholars.

The Case of *Lüdai*

The next case emerged during my research for my second book, which was my first foray in the complicated world of *hongxue* 紅學 (redology), a robust academic subfield dedicated to the Qing dynasty novel *Honglou meng* 紅樓夢

(Dream of the Red Chamber). When I began my research in 2010, I found that many scholars in this subfield had become frustrated by the lack of sources available for them to deeply investigate certain topics, such as the personal background of the novel's author, Cao Xueqin 曹雪芹 (also known as Cao Zhan 曹霑, c. 1715–63). Liu Mengxi 劉夢溪, a *hongxue* scholar at the Chinese National Academy of Arts, stated in 2005 that "the current predicament of *hongxue* is unlikely to change without the discovery of new sources" and declared pessimistically that "I believe *hongxue* is on the wane."[17] By applying ETR and making use of new digital resources, I hoped that I could uncover new materials that could breathe new life into *hongxue*.

At the beginning of my research in this project, I encountered the collected works of the bannerman Yiquan 宜泉 (1720–70), *Chunliutang shigao* 春柳堂詩稿 (Collected Poems of Spring Willow Hall).[18] This collection contains four poems related to Cao Xueqin, including "Huai Cao Qinxi" 懷曹芹溪 (Remembering Cao Qinxi), "He Cao Xueqin 'Xijiao xinbu qi feisi' yuanyun" 和曹雪芹〈西郊信步憩廢寺〉原韵 (In Response to Cao Xueqin's "Wandering the Western Suburbs and Taking a Rest at a Ruined Temple," Following the Original Rhymes), "Ti Qinxi Jushi" 題芹溪居士 (Inscribing for the Qinxi Jushi), and "Shang Qinxi Jushi" 傷芹溪居士 (Mourning Qinxi Jushi). The latter two poems contain annotations that describe "Qinxi" as "surname Cao and given name Zhan, courtesy name Mengruan and pseudonym Qinxi Jushi, talented at poetry and painting," and "he had an unbridled personality and loved to drink, and he was moreover talented at poetry and painting, but passed away under the age of fifty," respectively. Through these descriptions, many scholars have deduced that "Cao Qinxi," "Cao Xueqin," and "Qinxi Jushi" must all refer to the author of *Dream of the Red Chamber*, which makes this book a valuable source for information on Cao Zhan's background and personality. Other scholars, however, have questioned whether this person described in Yiquan's poems was simply a different figure that shared the novelist's name. Thus, *Chunliutang* has become one of the major sources of controversy and debate in *hongxue* circles.[19]

In my earlier research, I used clues found in *Chunliutang* to support the possibility that Yiquan and the novelist Cao Xueqin had crossed paths in their lives. However, to prove that these two people did indeed know each other, we need to check the background and activities of the over thirty individuals who were mentioned in *Chunliutang* and carefully scrutinize these references to see whether any of them were acquainted with Cao or people close to Cao. If we can identify overlapping social networks for Yiquan and the novelist, then the likelihood of these two instances of "Cao Xueqin" coincidentally sharing the same name would be infinitesimal, which would support the claim that the "Cao Xueqin" in these poems refers to the author of *Dream of the Red Chamber*.

One major problem is that most of the people mentioned in this poetry collection were obscure individuals who are difficult to track down. Moreover, Yiquan often referred to them using titles or nicknames, which makes them even harder to identify. One such figure is a person named by Yiquan as "Fourth Brother Li" (Li Sixiong 李四兄), to whom Yiquan dedicated two pentametric regulated verses in the collection. Given how common such epithets are, it would be impossible to determine who exactly this was just based on that nickname. These poems, however, provide just enough information on this person's background to allow us to find his exact identity by using ETR.

One of these poems, titled "Ti Li Sixiong shushe bi" 題李四兄書舍壁 (Inscribing the Walls of Fourth Brother Li's Study), reads:

	Who could swallow the volume of the sea when craving wine?	酒渴誰吞海
2	Among those living there is now another Banished Immortal.	人閒有謫仙
	After one jar, he would remove his cap,	一壺初脫帽
4	After five cups, he would shock the entire banquet.	五斗漸驚筵
	His superior reputation has already been noted in *lüdai*, (Annotation: "This is stated because he has been recommended to the court for promotion from his current spare position.")	呂袋休名注（原註：其為引見餘剩之員故云）[20]
4	His proficiency in the national language has been passed down. (Annotation: "This is speaking to the fact that he is knowledgeable in the Manchu language and could use analogies to teach others about Manchu-Chinese translation.")	清書慧性傳（原註：謂其教繙設曉、暢譯清文）
	He should scorch these tomes of insobriety,	還應焚醉籍
8	And cherish his remaining years from now on. (Annotation: "Appropriate use of references.")	從此惜殘年（原註：隸事工穩）[21]
		Chunliutang shigao, 21b.

The first line of this poem (see fig. 4) indicates Li's affinity for liquor by alluding to the linked verses composed jointly by Song dynasty scholars Wang Yucheng 王禹偁 (954–1001) and Liu Shaoyi 劉少逸 (b. 977), which include the line, "Once I craved wine so much I could swallow the seas" 一回酒渴思吞海.[22] The following line compares Fourth Brother Li to a much more famous Li, the Tang poet Li Bo (701–62), who nicknamed himself "Banished Immortal" (Zhexian 謫仙) in one of his poems.[23] Both "taking off one's cap" (*tuomao* 脫帽)

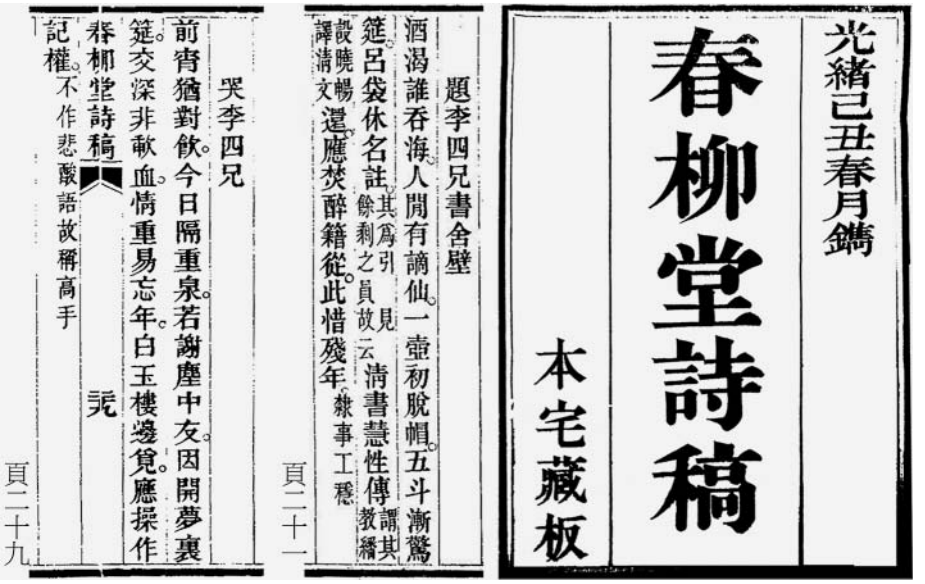
光緒己丑春月鐫
春柳堂詩稿
本宅藏板
題李四兄書舍壁
酒渴誰吞海人間有謫仙一壺初脫帽五斗漸驚筵呂袋休名註其爲引見餘剩之員故云清書慧性傳謂其教繙設曉暢譯清文還應焚醉籍從此惜殘年兼事工穩
頁二十一
哭李四兄
前宵猶對飲今日隔重泉若謝塵中友因開夢裏筵交深非歃血情重易忘年白玉樓邊覓應操作
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Figure 4. Poems that mention "Fourth Brother Li" in Yiquan's *Chunliutang shigao*. This manuscript is an 1889 edition currently stored in the National Science Library at the Chinese Academy of Sciences.

and "shocking the banquet" (*jingyan* 驚筵) in the next couplet are taken from the poem "Yin zhong baxian ge" 飲中八仙歌 (The Song of the Eight Immortals of the Winecup) by Du Fu 杜甫 (712–70), the former referring to the unbridled behavior of the calligrapher Zhang Xu 張旭 when he was drunk, and the latter describing the superior debate skills of the poet Jiao Sui 焦遂 even while inebriated.[24] In the last two verses, "tomes of insobriety" alludes to the story of the Song figure Wei Yuangui 衛元規 apologizing to a certain Vice Director Ding for insulting him after getting drunk and exclaiming that Wei would "from now on imprison the Wine Star in the Heavenly Cells, and burn the tomes of insobriety in the pits of Qin" 自兹囚酒星於天獄，焚醉籍於秦坑.[25] Here, Yiquan is advising his friend to give up wine and try to take better care of himself for the rest of his life, so that he could focus on putting his valuable talents to better use in service of the Qing court.

The problematic allusion in this poem is *lüdai*. Searching the Database of Chinese Classic Ancient Books for this term specifically yields no results. Searching for "lü+dai" ("呂+袋") yields 152 results, but most of them give no insight to the meaning of this term, given the context of this word in the poem. Given how ineffective these approaches are, we can apply one of the methods we used for the case of *chuzhi*. If we restrict our search once again to the *Peiwen yunfu* in the database we are using, and search for "袋？？切" to bring us directly to the page where the section on the character *dai* 袋 begins, we can eventually

find what appears to be the answer by going through all the entries under this character. We will eventually come across the word *jiadai* 夾袋, which according to *Peiwen* comes from a story regarding the well-known Song dynasty minister Lü Mengzheng 呂蒙正 (946–1011). *Peiwen*'s explanation reads:

> From *History of the Song Dynasty*: When Lü Mengzheng was serving as prime minister, he would carry a booklet in his pocket. When he met with guests, he would ask if they know any men who possessed special abilities. After the guests left, he would immediately make note what he learned in the booklet. Whenever the court was in need of capable men, Lü could simply look inside his pocket, which allowed all civil and martial positions to be filled by suitable talents (see fig. 5).
> 宋史呂蒙正為相，夾袋中有冊子。客謁見，必問其有何人才；客去，隨即疏之，悉分門類。朝廷求賢，即取之囊中，故文武各稱職。

Lüdai in Yiquan's poem should thus refer to the fact that the Qing government was familiar with the talents of "Fourth Brother Li." If we conduct another search for "jiadai" or "Lü Mengzheng," we can also find the same reference under the entries "jiadai zhong" (夾袋中, or "inside one's pocket") and "jiadai ce" (夾袋冊, or "booklet inside one's pocket"). This story can also be found in several Song dynasty daily use encyclopedias, such as *Dashi ji jiangyi* 大事記講義 (Lecture Notes on Records of Important Matters), *Shilei Beiyao* 事類備要 (Essentials of Historical and Literary Citations), and *Shiwen leiju* 事文類聚 (Encyclopedia of History and Literature).

In January 2015, in an online interview with Kongfz.com 孔夫子網 about ETR, I brought up the case of *lüdai*. Afterward, I received an e-mail from an anonymous netizen, who said the following:

> This is not an obscure allusion. Those with cursory knowledge of classical texts should already know the source. In *Longwen bianying*, a didactic text used to teach children how to read or write that everyone is familiar with, you can already find the stories of "Kou que libu, Lü zhi jianang" ("Kou Zhun 寇準 discarding the resumes and Lü Mengzheng keeping the booklet in his pocket"). Yiquan replaced the character *nang* 囊 with the character "dai" 袋 in order to follow his rhyme scheme, but anyone with discerning eyes could recognize this reference.
> 此並非僻典，讀書人對古書稍有涉獵，即可知出處。最為人熟悉的童蒙識字讀物《龍文鞭影》即有「寇却例簿，呂置夾囊」的故事。宜泉改「囊」為「袋」，也只是為了更換平仄，但此典故明眼人一看便知。

This person mentioned *Longwen bianying* 龍文鞭影, which is a very influential learning book for children (see fig. 6).[26] The first edition of this text includes

Figure 5. Contents in the *Peiwen yunfu* related to the allusion of *lüdai*. From auction.artron.net/paimai-art5037651385/

over a thousand four-character rhymed verses, containing numerous stories about historical figures from remote antiquity up to the Ming-Qing transition period. Aspiring poets used this text as reference to find classical allusions.[27] Yet although this was a popular didactic text for the masses during the Qing dynasty, it may not be as familiar for researchers in the twenty-first century, and it is unlikely that just "anyone with discerning eyes" can easily recall this reference from the *Longwen bianying*. By having intimate knowledge of this text, we would become familiar with all the references contained in the thousand verses it contains, but the breadth of its contents cannot be matched by the over one million entries found in the *Peiwen yunfu*, which scholars today can easily access digitally, as shown above.

Returning to "Fourth Brother Li," *Chunliutang* contains another poem titled "Ku Li Sixiong" 哭李四兄 (Mourning Fourth Brother Li), which is as follows:

	We were just sharing wine together a few evenings ago,	前宵猶對飲
2	Today we are separated in life and death by the Layered Springs.	今日隔重泉

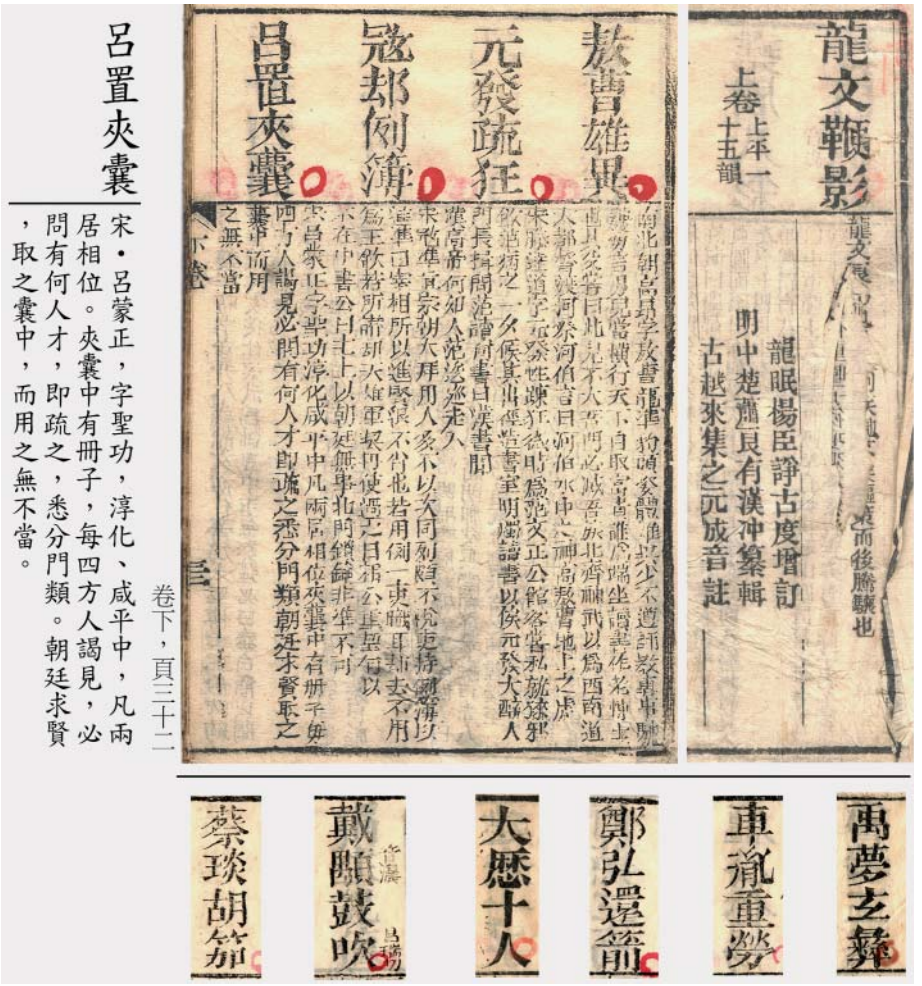

Figure 6. The reference to Lü Mengzheng found in the *Longwen bianying* (scanned from a Qianlong edition owned by Huang Yi-long)

	To toast this friend whose bonds were forged in the mortal world,	若謝塵中友
4	I would throw a party in the land of dreams.	因開夢裏筵
	Even though our friendship was not sworn by blood,	交深非歃血
6	The deep sentiments we shared for one another has transcended age.	情重易忘年
	I would look for you beside the White Jade Tower,	白玉樓邊覓

8 Knowing that you should be tasked with composing its commemoration. 應操作記權 [28]

(*Chunliutang shigao*, 29a–b.)

According to this poem, Li suddenly passed away just a few days after socializing with Yiquan. Yiquan wrote this poem to lament the loss of his close companion, comforting himself with the thought that, although Li's talents were never recognized by the emperor of the mortal world, he would certainly see favor from the ruler of the celestial realm where he now roamed.

Using information gleaned from both poems, we can surmise that Fourth Brother Li was someone who was likely much older than Yiquan ("deep sentiments that transcended age"). Li was proficient in both Manchu and Chinese, and his talents were known to the court, but his official career frustratingly never took off from the "spare position" that he started out with. At some point in his life, he had also taught classes on Manchu-Chinese translation.

Fourth Brother Li's real name is not given anywhere in *Chunliutang*, and Li is unfortunately a very common surname, which makes identifying him a very difficult task. I began by looking through the collected works of people who were active in the capital at around the same period. I found that the Qing calligrapher Wang Wenzhi's 王文治 (1730–1802) poetry collection contained an elegy to his close friend Li Yu 李御 (1712–96), who is referred to as "Li the Fourth, the lute master" ("Li Si Qinfu" 李四琴夫). Li Yu, however, did not appear to have studied Manchu. Moreover, after taking the imperial examinations in 1762, Li suddenly left the capital without saying goodbye to his acquaintances and colleagues before the results were released, and he was never recommended for any government position. It is thus unlikely that he was Yiquan's "Fourth Brother Li."

Going by the evidence that Li was recommended for an official position to the court based on his talent for translation, we can deduce that for this to happen at that time, Li would have most likely needed to have passed the highest level of the imperial examination system. During the Qianlong period, among the over three hundred candidates that could pass each metropolitan-level examination, around forty to sixty of these *jinshi* 進士 (palace graduate degree holders) would be given the title of bachelor (*shujishi* 庶吉士) upon entry into the Hanlin Academy, and the chancellor (*zhangyuan xueshi* 掌院學士) would select five to ten of them who were "under the age of thirty" and "able-bodied" to specifically study the Manchu language (*qingshu shujishi* 清書庶吉士). Under normal circumstances, after three years of studies in the Hanlin Academy, all bachelors who performed well would be promoted by the court to be compilers (*bianxiu* 編修) or examining editors (*jiantao* 檢討), while those whose

performances were average were assigned to various lower-ranking posts in the various ministries or sent out to serve as county magistrates. The few who were not selected for promotion during this process would be taken off the special career track for Hanlin bachelors and be considered for appointment like any other *jinshi*-degree holder.[29] It is possible that the "spare positions" that Yiquan mentioned in his annotations in the first poem referred to these bachelors that were held back in the Hanlin Academy. Among all successful examination candidates who suffered that fate from the Yongzheng to the Guangxu reigns, only four of them were surnamed Li: Li Tianxiu 李天秀 (1695–1765) and Li Xiuqing 李修卿 (c. 18th century), who passed the 1733 (Yongzheng 11) metropolitan exams; Li Fangtai 李方泰 (1721–61), who passed the 1751 (Qianlong 16) exams; and Li Ming 李銘, who passed the 1780 (Qianlong 45) exams.[30] Among these individuals, Li Tianxiu, Li Xiuqing, and Li Ming all eventually received assignments as county magistrates.[31] That leaves Li Fangtai as the mostly likely match with Yiquan's "Fourth Brother Li."

According to the Qing dynasty *Qing shilu* 清實錄 (The Qing Veritable Records), Li Fangtai (courtesy name Tongyin 桐音) remained a bachelor in the Hanlin Academy for six years, and he eventually left the academy with the successful candidates of the 1754 (Qianlong 19) examinations.[32] He stayed five years longer than the candidates from his year, as most of them were reassigned only seventeen months after they passed the examination to accommodate the incoming batch of successful candidates from the 1752 (Qianlong 17) special examinations. The 1751 class hence stayed in the academy for only seventeen months, less than half of the normal tenure of a Hanlin scholar, and the class of the 1752 from the special examinations also had their tenure cut short by a year to accommodate the next group of candidates of 1754.[33] Li Fangtai was probably not held back because of poor performances in his studies in the Hanlin academy, as this would have been pointed out specifically in the *Shilu*. It was more likely that he missed out on reassignments twice because of personal reasons. This timeline would especially make sense if one of his parents passed away before the end of his original tenure, as that would have forced him to halt his official activities and return home for twenty-seven months for the mandatory mourning period, which would have caused him to miss both of the aforementioned deadlines.[34] By the time he was finally ready to leave, he would have been assessed by Jiang Pu 蔣溥 (1708–61), who was serving jointly as the chancellor of the Hanlin Academy and as an assistant grand secretary, making him the proxy for Lü Mengzheng in the *lüdai* story.[35]

In the fourth month of Qianlong 23 (May 1758), when the thirty-eight-year-old Li Fangtai's resume was finally submitted to the emperor, he was assigned to be only an expectant appointee (*houxuan* 候選) for a county

magistrate position (see fig. 7). According to the short biography of Li in *Qingyang fuzhi* 慶陽府志 (Gazetteer of Qingyang Prefecture), Li was eventually appointed to succeed the position in Susong County 宿松縣 at Anhui Province but passed away before he could begin his official tenure.[36] Given that Wang Xitai 王熙泰 (c. 18th century) served as the Susong magistrate from the second month of Qianlong 23 (March 1758) to sometime in the autumn of Qianlong 26 (1761), when he was replaced by Zhang Renshou 張仁壽 (c. 18th century), Li Fangtai was probably given his assignment when Zhang was about to leave but died before he could take up that post. And given that Yiquan mentioned that they were just drinking together a few days before Li died in "Lamenting Fourth Brother Li," Li Fangtai likely passed away in Beijing while preparing for his upcoming trip to the south.

The annotation for the line in "Inscribing the Walls of Fourth Brother Li's Study" that includes the *lüdai* allusion also suggests that Li had taught Manchu at one point, likely during the period while he was awaiting assignment after leaving the Hanlin Academy. Given Li Fangtai's qualifications, the most likely teaching position that he could have taken would be as an instructor in one of the imperial clan academies (*zongxue* 宗學).[37] Starting in 1725 (Yongzheng 3), these schools selected Manchu language instructors from a pool of "retired or unemployed Manchu officers, as well as *jinshi*, *jugong* 舉貢 (Tribute Student), and *shengyuan* 生員 (Licentiate) degree holders who were adept at translation."[38] After serving a tenure of three years, these instructors would be evaluated by the imperial clan court (*zongrenfu* 宗人府), where those who gave above-average performances were promoted to other government positions, while those who gave average performances would stay for another three-year tenure. In 1757 (Qianlong 22), nine Chinese instructors in the imperial clan academies were replaced by translation instructors.[39] Li Fangtai may have applied for this newly created teaching position in that same year, with the hope that he would soon be given an assignment as a magistrate or a teaching post at a county. The opening of nine new translation instructor positions would have made it more likely for Li to be selected. He may have eventually received his appointment to Songsu County after he completed his tenure, but unfortunately he passed away suddenly before he could head off to his new job.

Coincidentally, Cao Xueqin might have been selected from a pool of translation degree holders to serve as a Manchu language instructor at the Right school of the Imperial Clan Academies a few years earlier.[40] He and Li Fangtai may have thus crossed paths due to having served in the same position. Moreover, besides their mutual friendship with Yiquan, these two were also linked through a web of social interactions among various degree holders who were serving as Hanlin scholars or teachers in imperial schools. For example,

Zhou Yuli 周於禮 (1721–79), a bachelor who was in the Hanlin Academy at the same time as Li, was a close friend of the family of Cao's close associates, the imperial clansmen and brothers Duncheng 敦誠 (1734–91) and Dunmin 敦敏 (b. 1729).[41] Zhou also introduced another Hanlin bachelor, Jiang Liangqi 蔣良騏 (1723–88), to the Dun brothers and their friend Yonghui 永憙 (1729–90; he happened to be the brother-in-law of Cao's cousin Fuxiu 福秀).[42] Another person with the same background who might also have been part of this social network was Zhu Yun 朱筠 (1729–81), whose father, Zhu Wenbing 朱文炳 (1689–1764), served as an instructor in the banner schools and whose son-in-law Gong Yi 龔怡 (1749–76) was another one of Duncheng's closest friends. These are just a few examples of individuals who were connected as parts of a larger social network of Eight Banner nobles, imperial academy instructors, and Hanlin Manchu bachelors (see fig. 7). All these people may not have known everyone else in the network very well, but they would all have some close relatives or friends who were part of this large social circle.[43]

In summary, using the evidence gathered from using ETR, I have uncovered the possible identity of "Fourth Brother Li" in Yiquan's poems as Li Fangtai. Moreover, given the new discovery that Li Fangtai may have served as an instructor in the imperial clan academies, and Li's and Cao's mutual friendship with Yiquan, we can deduce that it was very likely that these two would have known each other. They were both part of a larger social network in Beijing that was founded on education, particularly the instruction of Manchu language.

Concluding Thoughts

Using the cases of *chuzhi* and *lüdai*, I have explored different ways that we could employ new digital tools in conjunction traditional research methods to expand the frontiers of philological investigation. During my investigation of both of these literary allusions, I first figured out the basic organization of the digitized resource I was using (for these cases, the *Peiwen yunfu*), after which I grasped the special characteristics of those resources to determine the most efficient approach to find answers to my questions. This is the standard methodology for applying ETR. There are of course other ways to find the meaning of these allusions.[44] The application of ETR to comprehensive digitized compendia like the *Peiwen yunfu*, however, should help us solve the vast majority of problems in this vein.

In summary, the principle ethos of ETR is not just to help scholars find what they want but, rather, to allow scholars to engage with a large body of sources rapidly, from which we may conduct much more thorough studies. Upon discovering important materials, we need to remind ourselves to be diligent about exploring their contexts to find other related sources and thereby

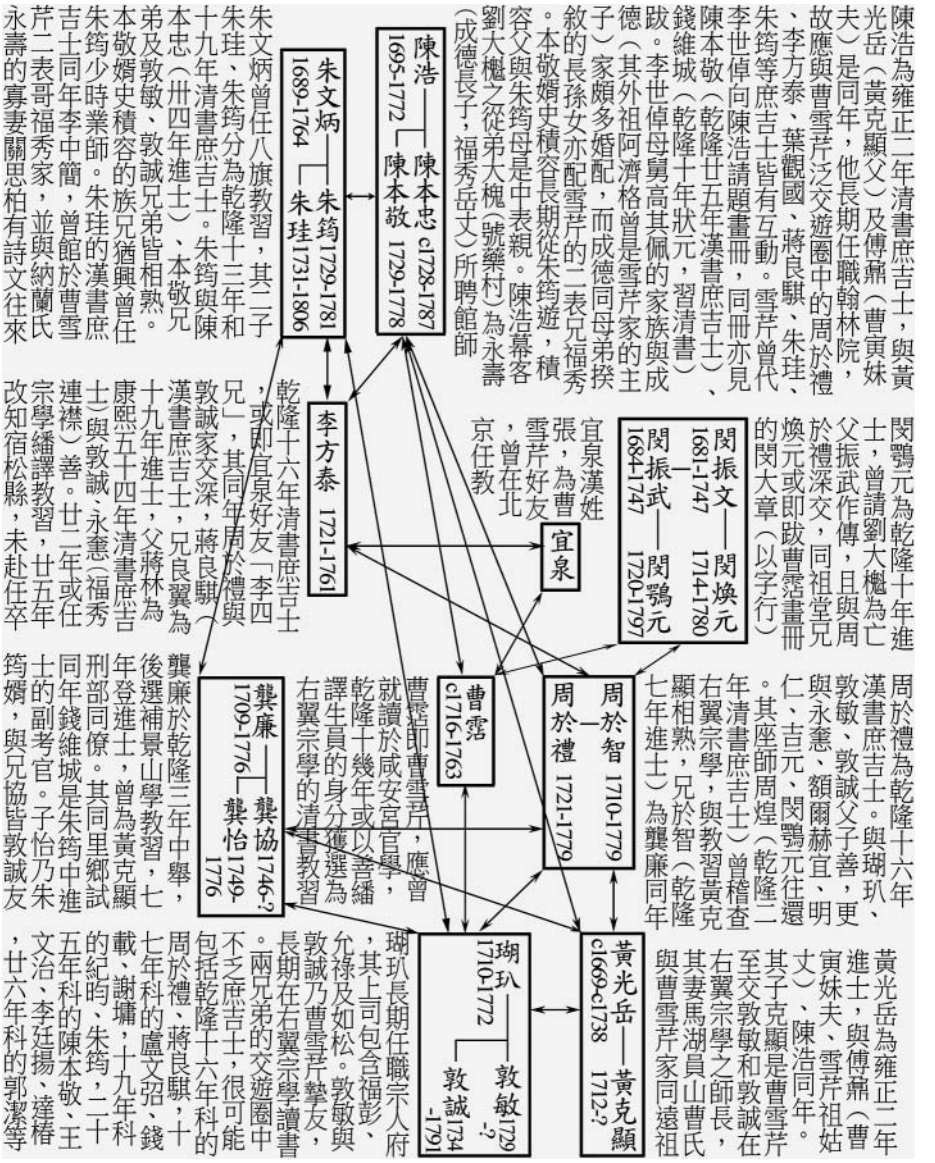

Figure 7. Biographies of various Hanlin bachelors who were part of Li Fangtai's and Cao Xueqin's social network

expand our knowledge base. This is often information that could not be accessed through blindly submitting basic keywords to search engines, requiring scholars to adopt more refined techniques to dig them up from the databases.

Through my experience with ETR, I have found that in this new digital era what we are lacking is not the sheer volume of our sources but the means by

which to analyze these sources more succinctly and meticulously and contextualize them in the bigger picture. For scholars in the humanities, ETR and traditional textual research do not need to be in conflict. Instead, we should think of ETR as an upgraded version of traditional philology. The biggest difference is that ETR opens scholars to a much wider array of alternatives and affords scholars the chance to manage this vast array of sources within a tighter time frame. The difficulty lies in how scholars can use their own powers of deduction to select relevant information out of the vast sea of materials that may at first glance appear to have nothing to do with another, and then forge a mental map that connects these pieces of information. This is akin to the work of an archaeologist attempting to put shards of ancient pottery back together in their original shape.

ETR may represent a paradigm shift in the humanities, but this does not mean we should abandon our traditions. We should instead take advantage of these new digital tools to redefine and further enrich our understanding of our traditions. ETR would allow scholars who already possess a solid foundation in traditional research methods to make breakthroughs in their research, but it would not allow someone who is completely lacking in that foundation to make any significant contributions, nor could it guarantee that we can solve every problem we face. It is simply a new skill that students today should master during their development as scholars. Because of the new frontiers that ETR has opened, this means that we can find solutions for topics in ways that our predecessors could only dream of. This presents whole new challenges for scholars today and puts the burden on us fulfill these new potentials.

YI-LONG HUANG 黃一農
National Tsing Hua University, Hsinchu, Taiwan
ylhuang@mx.nthu.edu.tw

BINGYU ZHENG 鄭冰瑜
New York University
bingyuzh@gmail.com

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Notes

1. See Huang, "Mingmo zhi Aomen mu Pu bing"; Zhang, "E-kaoju shi 'liti' shixue"; and Ma, "Jisuan lishi xue." Unless otherwise noted, all first-person pronouns in the main text refer to the first author, Huang Yi-long.
2. Huang, *Liangtou she*, 229–52.
3. Peng et al., *Quan Tang shi*, 171.1762. This verse is literally translated as "even after his total volume of works have been curated, when stacked together they are still as tall as two ox's waists."
4. See Xiao, *Liuchen zhu Wenxuan*, 45.34.
5. Xiao, *Nanqi shu*, 48.840.
6. Regarding Hou Ba's story, see Ouyang et al., *Yiwen leiju*, 40.21.
7. Huang, *Liangtou she*, 251.
8. Liu, *Shishuo xinyu*, 4.29. Regarding "order prevailing by knotting cords," according to the *Yijing* 易經 (Book of Change), the rulers of ancient antiquity preserved order through knotting cords, which was replaced by written documents in later generations. See also Mather, *Shih-shuo Hsin-yu,* 287. Cao Chu's real name was Cao Maozhi 曹茂之; "Chu" was one of his pseudonyms.
9. For more on Cao Chu's and Li Zhi's careers as officials, see Zhang, *Youhuan jiwen*, 10.8.
10. Huang, *Liangtou she*, 249–51.
11. For more on classical allusions from the *Shishuo xinyu*, see Mei, "*Shishuo xinyu*."
12. The original website for the file was hss.nthu.edu.tw/～ylh/book/corrections.doc. However, because the web server where this document was uploaded suffered an attack, the administrators of the server removed several services and functions from its website on October 2016. As a result, this document can no longer be found online. Knowledge of the *yuzhi* reference has, however, already been disseminated widely across the Internet.
13. If you search for "蜍志" and "黃一農" in Google, you can find at least seven websites where you can learn about the meaning of this reference. On Baidu, you can only find my June 2017 talk at the Institute of Modern History at the Chinese Academy of Social Sciences in Beijing. Even though I mentioned the term during this talk, you will not be able to find specific details regarding its meaning on that website.
14. *Sukjong daewang sillok*, 41.2.
15. For more on the compilation of the *Peiwen yunfu*, see Cao, "Cao Yin yu Yangzhou Shiju"; and Zheng, "Peiwen yunfu de bianzuan."
16. Regarding the question marks, according to the design of the Database of Chinese Classic Ancient Books, as well as many other databases of Chinese texts, each question mark represents a single space replacing a character. The question marks can be input in both half-width and full-width forms.
17. Liu, *Honglou meng yu Bainian Zhongguo*, 405.
18. The copy of the manuscript I found did not indicate his Chinese surname, Zhang.
19. For more discussions on this topic, see Huang, *Er chongzou*, 351–404.
20. In this annotation, there is a space between the characters *yin* 引 and *jian* 見. The space, commonly applied in front of words that signify the emperor as a sign of deference, suggests that the latter character refers to the presence of the emperor. This phenomenon can regularly be found in many texts digitized in Database of Chinese Classic Ancient Books.
21. This was likely the annotation of Yiquan's editor, who praised his citation of historical references.

22. See Zhang and Huangfu, *Changzhou xianzhi*, 14.2–3.
23. One can find the poem in question very quickly by searching "jiu+Zhexian" ("酒+謫仙") in digitized versions of the *Peiwen yunfu.* It is titled "Answering Vice Superintendent Jiaye of Huzhou's Question of Who Is Bo?" (Da Huzhou Jiaye Sima wen Bo shi heren 答湖州迦葉司馬問白是何人). See Zhang et al., *Peiwen yunfu*, 178.1818.
24. Du, *Du Gongbu ji*, 1.17–19.
25. Wei Yuangui's story has been alluded to in other works as well, such as in the Qing dynasty official Zhu Wanjin's 朱萬錦 poem "Eight Immortals of the Winecup" ("Yin zhong baxian" 飲中八仙), which contains the verse "Make haste to the land of continence to scorch the tomes of insobriety" (急到醒鄉焚醉籍). It has appeared in other places but often written alternatively as "scorch the drunken sun" (焚醉日), "scorch the drunken moon" (焚醉月), or "scorch drunken eyes" (焚醉目). See Mao, *Zhang Mengze*, 12.9; and Cheng et al., *Quan Qing ci*, 9.5425.
26. The title of this book translates literally to "the shadow of a whip for the Longwen horse." According to its compiler, Yang Chenzheng 楊臣諍, he chose this title based on the recommendation of a friend, as he hoped those who read the book could strive for learning like the Longwen, a superior breed of horse that would "immediately gallop when it sees the shadow of a whip, and would not wait until it is whipped to set off." See Zhang, *Anqing fuzhi,* 19.16.
27. For more on this text, see Wang, "Chuantong mengshu."
28. This is a reference from the Tang poet Li Shangyin's "Short Biography of Li He" (Li He xiaozhuan 李賀小傳), which describes that Li He was called upon one day by a figure in crimson robes to compose a eulogy to commemorate the construction of "White Jade Tower" by the Celestial Deity (*di* 帝), and passed away soon after this encounter. We can find this reference easily by searching "yunzao+lou" ("韻藻+樓"), which would bring us to the subsection under the character "lou," from which we could find the entry "yulou" 玉樓. See *Peiwen yunfu*, 26.39.
29. See Wang, "Qingdai de qingshu shujishi."
30. Zhu, *Cilin jilüe*, fascicles 3–9.
31. See Qin, *Qingdai guanyuan lüli*, 15.479, 591; 22.528.
32. The *Shilu* never specified if Li was specifically a Manchu bachelor (*qingshi shujishi*), as was customary for all Hanlin bachelors who were returned to the regular appointment track.
33. *Qing Gaozong shilu*, 424.551, 553; 424.553; 462.1001; 463.1006.
34. There was precedence for this kind of case in the example of Dou Keqin 竇克勤, who attained the *jinshi* degree in the year Kangxi 27 (1688) at the age of thirty-six and was assigned as a Manchu bachelor (*qingshu shujishi*) on the ninth day of the fifth month of that year. However, he returned home to mourn his mother's passing on the eleventh month of that year and would come back to the Hanlin Academy only in the first month of Kangxi 31 (February 1692) to resume his Manchu studies. He was examined on Kang 33.3.12 (April 6, 1694), where his Manchu ability was judged to be "somewhat proficient" 滿文粗通, and he was accordingly assigned to be a compiler and examining editor. See Dou, *Xunletang rilu*; and *Qing Shengzu shilu*, 150.664; 162.777.
35. *Qing Gaozong shilu*, 498.269; 566.185.
36. *Qing Gaozong shilu*, 424.551, 553; 462.1001; 463.1006.
37. With regards to the various other official schools, the Gioro Academy (*Jueluo xue* 覺羅學) would select only one Manchu degree holder who was adept at translation to serve as Manchu language instructor at any time. The Xian'an Palace Officers' School

(*Xian'angong guanxue* 咸安宮官學), established in 1728 (Yongzheng 12), would hire three Manchu instructors, but also only among *jinshi* and *juren* (provincial graduate) degree holders in the Eight Banners. Due to lack of qualified individuals applying for this position, however, in 1757 the court decreed that banner clerks (*bithesi* 筆帖式) in all departments and ministries could also be appointed as instructors. Manchu instructors at the Prospect Hill Officers' School (*Jingshan guanxue* 景山官學) were typically selected from retired officials or unemployed bannermen in the Imperial Household Department. Finally, for the various lower-level Eight Banners officers' schools in Beijing (*baqi guanxue* 八旗官學), instructors were typically chosen from *gongsheng* 貢生 degree holders, and not *jinshi*. See Zhang et al., *Qingding huangchao wenxian tongkao*, 14.623, 18.180–88. See also Crossley, "Manchu Education."

38. Zhang, et al., *Qingding huangchao wenxian tongkao*, 63:18.
39. See Zhang et al., *Qingding huangchao wenxian tongkao*, 63.18.
40. See Huang, "Xian'angong guanxue."
41. Shen, "Du Chen Hao."
42. Zhu, "Jiang Liangqi nianpu jianbian."
43. For further discussions, see Huang, "Cao Xueqin xiancun shihua."
44. For example, the website Souyun 搜韻 (sou-yun.com) has collected a large corpus of over seven hundred thousand classical poems and is convenient to use. By searching for "chuzhi" on that website, you will find thirty-six poems where both characters *chu* and *zhi* appear (*chu* and *zhi* need not to be connected). Among these results, poems by Li Hong 李洪, Xiao Lizhi 蕭立之, Yan Tingzhong 嚴廷中, Huang Zunxian 黃遵憲, and Chen Yinke 陳寅恪 all mention the historical figures Cao Chu and Li Zhi. Meanwhile, if you search for *lüdai*, you can also find a poem by Tang Yin 唐寅 titled "Painting of Lü Mengzheng in Snow" ("Lü Mengzheng xuejing tu" 呂蒙正雪景圖) that includes this reference. The only drawback of this website is that it does not provide detailed explanations of the references or their original sources.

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