

ISO 690 biblatex style

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Version 0.4.0
March 25, 2020

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1 Introduction

1.1 About

biblatex is a bibliography and citation tool for \LaTeX . This project provides support for citations and references according to the ISO 690 international standard. As the standard ISO 690 is a little bit ambiguous in some details regarding the formatting of records, we largely follow the requirements of the Czech interpretation, as it is the required form in many Czech universities. Of course, the style can be used in other languages as well.

1.2 Requirements

Basically, biblatex ≥ 3.14 with biber ≥ 2.14 (both versions dated 2019-12-01) is all you need to use this package. No special packages different from those required by the biblatex package are used. For a complete list of such packages, please refer to the biblatex documentation.

1.3 Accessibility

This package is available on CTAN¹ and is included in MiKTeX and TeX Live 2016 or later as biblatex-iso690. The development version can be found on GitHub.²

1.4 License

This project is released under the LaTeX Project Public License³.

¹<https://www.ctan.org/pkg/biblatex-iso690>

²<https://github.com/michal-h21/biblatex-iso690>

³<https://www.latex-project.org/lppl.txt>

1.5 Acknowledgments

Thanks to all contributors who have participated in the development of this style, especially Johannes Böttcher, Moritz Wemheuer, Dávid Lupták and others.

1.6 Feedback

The project lives on the GitHub page <https://github.com/michal-h21/biblatex-iso690>, so feel free to use the possibilities provided there for reporting issues and the like.

2 Usage

2.1 General

A minimal working example for babel package:

```
\documentclass{article}
\usepackage[utf8]{inputenc}
\usepackage[english,czech]{babel}
% \usepackage[main=czech,english]{babel}
\usepackage{csquotes}

\usepackage[style=iso-authoryear]{biblatex}
\addbibresource{mybib.bib}

\begin{document}
\cite{knuth1990virtual}
\printbibliography
\end{document}
```

A minimal working example for polyglossia package:

```
\documentclass{article}
\usepackage[utf8]{inputenc}
\usepackage{polyglossia}
\setmainlanguage{czech}
\setotherlanguage{english}
\usepackage{csquotes}

\usepackage[style=iso-authoryear]{biblatex}
\addbibresource{mybib.bib}

\begin{document}
\cite{knuth1990virtual}
\printbibliography
\end{document}
```

According to the ISO 690 standard, some of the elements of the bibliographic resource should be printed in the main document language (language I am currently writing) while

the others should be in the language of a resource. You can specify the language of a resource into the field `langid` on a per-entry basis in a resource (`.bib`) file. In addition, all of the languages specified in these fields have to be loaded by the `babel` or `polyglossia` package respectively.

Note that for correct support of localization functionality, the `babel` or `polyglossia` package should be used. The main document language is:

babel the last one entered in a list of languages passed to the `babel` package options, or the one specified by `main` keyword (see MWE above)

polyglossia the one specified in the directive `\setmainlanguage` (other languages could be specified using `\setotherlanguage`) (see MWE above)

2.2 Citation systems

The international standard ISO 690 introduces three methods (2.2.1) of citation and referencing in its informative annex. You can select a citation/referencing method in the `style` option:

```
\usepackage[style=<method>]{biblatex}
```

2.2.1 Standardized methods

The informative annex of the standard mentions name and date, numeric, and running notes systems. This package does not support the last one.

iso-authoryear name and date system, so-called Harvard style

iso-numeric numeric system

2.2.2 Non-standardized methods

Based on the user input, this package also supports other citation/referencing methods:

iso-alphabetic alphabetic system

iso-authortitle name and title system

2.3 Citation commands

`biblatex` provides a lot of citation commands out of the box. However, to conform to the standard, it is necessary to know which command can be used for which citation method. Here is an overview.

2.3.1 Numeric system

For iso-numeric style, the usage of cite command is as simple as `\cite` (citation number in brackets), `\parencite` (citation number in parentheses), or `\supercite` (citation number as a superscript).

Example (number 1 only serves as a random citation number):

- command `\cite{knuth1990virtual}` outputs [1],
- command `\parencite{knuth1990virtual}` outputs (1),
- command `\supercite{knuth1990virtual}` outputs ¹.

According to the standard, pick and stick to only one citation format in the whole document (select either only `\cite`, or `\parencite`, or `\supercite`).

2.3.2 Author-date system

For iso-authoryear method (and possibly also for other methods iso-alphabetic and iso-authortitle), you should distinguish two situations:

- The name of the creator appears naturally in the text, so only the year is in parentheses; use `\textcite`.

Example: command `\textcite{knuth1990virtual}` outputs **knuth1990virtual**.

- The name of the creator doesn't appear naturally in the text, so both name and the year are in parentheses; use `\parencite`.

Example: command `\parencite{knuth1990virtual}` outputs (**knuth1990virtual**).

2.4 Package options

2.4.1 Provided by biblatex by default

Frequently used package options are:

`style=iso-authoryear, iso-numeric, iso-alphabetic, iso-authortitle`

Style to be used for bibliography references and citations. Four possibilities are available for the biblatex-iso690 package, see 2.2 for details.

`backend=biber, bibtex, bibtex8`

default: biber

Backend program for generating bibliographic entries. biber is the default one for the biblatex package, providing a large variety of features. Other options are bibtex and bibtex8, but they both are far behind the possibilities of biber. biber is the recommended backend.

`autolang=other`, see biblatex documentation for more options

default: other

Controls which language environment is used. The default value for this package is other, which encloses the bib entry in an otherlanguage environment and prints localization terms in the language of the resource or uses language-specific hyphenation. Use the langid field in bib entry to specify its language.

`sortlocale=auto, <locale>` default: auto

Responsible for sorting the bibliography according to the entered `<locale>` identifier. The default value is `auto`, meaning the `<locale>` is set to the main document language identifier (if `babel/polyglossia` is used). A real use case example: this document is in English (main document language), but uses Czech sorting (`sortlocale=cs_CZ`).

2.4.2 Provided by `biblatex-iso690` in addition

`spacecolon=true, false` default: false

If `true`, a space is printed before the colon used in subtitles and publication information. Printing the colon this way is not recommended. The default value is `false`.

`pagetotal=true, false` default: false

The number of total pages is no longer required if the item is being cited as a whole. Setting this option to `true` will print such optional information in the notes section at the end of the reference in brackets. The default value is `false`.

`shortnumeration=true, false` default: false

The standard ISO 690 allows omission of term `volume` and terms for smaller components of a serial publication. If this option is `true`, such terms are distinguished typographically (the volume number in bold type and the part number, if required, in parentheses). If `false`, such terms are printed with preceding literal terms.

`thesisinfoinnotes=true, false` default: true

To print a thesis information (thesis type, institution and supervisor) before the section *availability and access* is possible by setting the option to `false`. Otherwise it will be printed in the *notes* section. The default value is `true`.

`doi=true, false` default: true

Enable or disable printing of the DOI number.

`isbn=true, false` default: true

Enable or disable printing of the ISBN, ISSN, and other standard identifiers.

`eprint=true, false` default: true

Enable or disable printing of the eprint field.

`url=true, false` default: true

Enable or disable the printing of the URL. This option also affects the printing of `[online]` medium designation for electronic resources other than `@online` entry type (see 2.6.3).

`articlepubinfo=true, false` default: false

Enable or disable printing publication information (`location` and `publisher` fields) for an `@article` entry type. The default value is `false` since it is very unusual behavior and rarely used by either other citation styles or citation managers.

2.5 Database guide

biblatex supports more entry fields than legacy BibTeX. Hence some examples of bibliography entry types with respective fields follow.

Book

borgman2003from

```
@book{borgman2003from,
  author   = {Borgman, Christine L.},
  title    = {From {Gutenberg} to the Global Information Infrastructure},
  subtitle = {Access to Information in the Networked World},
  location = {Cambridge (Mass.)},
  publisher = {The MIT Press},
  date     = {2003},
  pagetotal = {xviii, 324},
  isbn     = {0-262-52345-0},
  langid   = {english},
}
```

The `pagetotal` field is the total number of pages of the work. If multiple kinds of numeration are used in the work, e.g. Arabic as well as Roman numerals, both can be provided, separated by a comma. The localization term `pages` is only appended for Arabic numerals, though. Note that the total number of pages is no longer required by the standard itself, see also 2.4.2.

The `langid` field is required for multilingual support of printing references. This option affects the printing of localization terms used in the reference, e.g. `edition` field. See also 2.1.

Contribution to a collection

greenberg1998camel

```
@incollection{greenberg1998camel,
  author   = {Greenberg, Douglas},
  title    = {Camel Drivers and Gatecrashers},
  subtitle = {Quality Control in the Digital Research Library},
  editor   = {Hawkins, Brian L. and Battin, Patricia},
  booktitle = {The Mirage of Continuity},
  booksubtitle = {Reconfiguring Academic Information
    Resources for the 21st Century},
  date     = {1998},
  location = {Washington (D.C.)},
  publisher = {Council on Library and Information Resources;
    Association of American Universities},
  isbn     = {1-887334-59-9},
  pages    = {105--116},
  langid   = {english},
}
```

```
}
```

The `title` field is the title of the contribution, the `booktitle` is the title of the collection.

The `pages` field is one or more page numbers or page ranges. This field is essential since the reference should identify the part of the item that is cited.

It is also possible to use the cross-referencing feature to reference from a contribution entry (child entry) to a separate entry of a collection (parent entry). This can be done with the `crossref` field as the following example shows:

sbornik2007clanek

```
@collection{sbornik2007,
  title      = {Mimořádně užitečný sborník},
  editor     = {Geniální, Jiří},
  location   = {Praha},
  publisher  = {Academia},
  date       = {2007},
  isbn      = {978-3-4947-0284-1},
  langid     = {czech},
}

@incollection{sbornik2007clanek,
  author     = {Vlaštovka, Josef},
  title      = {Velmi zajímavý článek},
  pages      = {22--45},
  crossref   = {sbornik2007},
}
```

Now, there is no need to fill in `booktitle` in the `sbornik` entry. The biber backend program performs the inheritance between parent and child entry automatically. Other backends may not support this feature.

Article in a serial

lynch2005where

```
@article{lynch2005where,
  author      = {Lynch, Clifford},
  title       = {Where Do We Go From Here?},
  subtitle    = {The Next Decade for Digital Libraries},
  journaltitle = {D-Lib Magazine},
  date        = {2005},
  volume      = {11},
  number      = {7/8},
  issn        = {1082-9873},
  doi         = {10.1045/july2005-lynch},
  url         = {http://www.dlib.org/dlib/july05/lynch/07lynch.html},
  urldate     = {2005-08-15},
  langid      = {english},
}
```

```
}
```

The example above is an article in an online magazine. If the magazine is available online only, i.e. it is not published in print, it should be cited as an electronic information resource. This can be achieved by providing the `urldate` field (see [2.6.3](#)). On the other hand

knuth1990virtual

```
@periodical{tugboat1980,
  journaltitle = {TUGboat},
  publisher    = {TUG},
  date        = {1980/},
  issn        = {0896-3207},
  url         = {http://tugboat.tug.org/TUGboat},
  langid      = {english},
  options     = {skipbib=true},
}

@article{knuth1990virtual,
  author       = {Knuth, Donald},
  title        = {Virtual Fonts: More Fun for Grand Wizards},
  date         = {1990-04},
  volume       = {11},
  number       = {1},
  pages        = {13--23},
  url          = {http://tugboat.tug.org/TUGboat/tb11-1/tb27knut.pdf},
  crossref     = {tugboat1980},
}
```

the example shows an article in a printed magazine, which is *also* available online. Similar to the contribution to a collection, using the cross-referencing feature can be beneficial.

2.5.1 Specific entry types

Thesis

The thesis entry type and its aliases `mastersthesis` and `phdthesis` are available by default for thesis works. Use the `type` field to specify the type of the thesis – a localization term or literal string can be entered. For the list of supported localization terms, please refer to section 4.9.2.13 of the `biblatex` documentation. Available terms are `bathesis`, `mathesis`, `phdthesis`, and `candthesis`. Names of the supervisor and school (institution) can be entered into the fields `supervisor` and `institution`, respectively.

luptak2016thesis

```
@thesis{luptak2016thesis,
  author       = {Lupták, Dávid},
  title        = {Typesetting of Bibliography According to ISO 690 Norm},
  date         = {2016},
```



```

type      = {bathesis},
institution = {Masaryk University, Faculty of Informatics},
location  = {Brno},
supervisor = {Petr Sojka},
url       = {https://is.muni.cz/th/422640/fi_b/},
}

```

Patent

The field number is available for the patent classification or request number. If the inventor is also known, we can use `editora` and `editoratype` fields to specify that. Use an additionally created role `inventor` for the `editoratype` field; it is the key that translates based on the localization strings. For the patent type, we can use localization strings as well, e.g. `patenteu`.

groll2008method

```

@patent{groll2008method,
  author      = {Clad Metals LLC Canonsburg, PA 15317 (US)},
  title       = {Method of making a copper core five-ply composite
                 and cooking vessel},
  editora     = {Groll, W. A.},
  editoratype = {inventor},
  publisher   = {Google Patents},
  number      = {EP 1 094 937 B1},
  type        = {patenteu},
  date        = {2008-07-30},
  url         = {https://patents.google.com/patent/EP1094937B1},
}

```

2.6 Hints and Caveats

This section provides additional hints concerning the `biblatex` package as well as the ISO 690 standard.

For now, some of the things have to be dealt with at the level of the `bib` file, other ones are directly addressed in this style package. Everything else relies on the `biblatex` package, so please also refer to the `biblatex` documentation.

2.6.1 Creators

The persons or organizations responsible for the cited work should be primarily given in the `author` field. If it is not appropriate, other fields like `editor` and `editorX` family fields or some specific ones (e.g. `translator`) can be used. Note also the field `editortype` and `editortypeX` family fields which can be used to specify the type of the editor. This is useful to distinguish the role of the creator and their relationship to the cited work. Some roles are supported by default, e.g. `editor`, `compiler`, `founder` and `reviser`, some are created additionally, i.e. `inventor`, `director`; in other cases, use the literal string.

Example: When citing cinematographic works, which are typically the output of many individuals, the title should be used as the first element of the reference. However, it is appropriate to include some relevant roles, e.g. the director:

```
editora      = {Welles, Orson},  
editoratype = {director},
```

The field `nameaddon` can be used to append additional information to the creator's name, e.g. variant forms of a name, name additions, or pseudonyms. This field is printed as is, in square brackets, after the creator's name, see (**gorki1955artamonovs**).

If possible, all names of multiple creators should be given in the reference (the upper limit is set to 99 names). If you need to omit any names, you can use the keyword `and others` in the name list for your bib entry:

```
editor = {Humphrey Appleby and others},
```

For anonymous works cited by the author-year method, the term *Anon* should be used in place of the creator's name. Please reflect this in the bib file, since there is no other support for this for now.

2.6.2 Titles

Similar to the `nameaddon` field for names, `titleaddon` serves such purpose for titles. This field is appropriate for providing other or alternative titles, elucidation of ambiguous or incorrect titles, substitute for no titles, translation of titles, etc., see (**gorki1955artamonovs**).

Note that also other `*titleaddon` fields are supported by default.

2.6.3 Medium type

The field `howpublished` is used for providing information about the medium designation (e.g., Braille, film, and photograph) or type of medium for the electronic resources (e.g., online, online database, and podcast). The default output for electronic information resources (@online entry types or entries including `urldate` field) is `[online]`, even without

```
howpublished = {online},
```

listed in the bib file. The `howpublished` field is printed as is, in square brackets, after the title section, generally. The field accepts localization strings (e.g. `online` or `film`) or literal string values.

2.6.4 Edition

The `edition` field is the edition of a publication. It is required if the item is not a first edition. Use an integer or a literal string to fill in this field. Please reflect the constraint not to print the edition if the cited item is a first edition, by not providing this field in the bib file.

The `version` field is used for providing information about updated versions of an item, usually software.

2.6.5 Date

If an exact date is not known, an approximate date should be supplied in brackets preceded by a circa localization string (e.g. ca.). To achieve this behavior, specify the date followed by a tilde, as in the example below:

```
date = {1490~},           % tilde meaning circa
```

In case no date is given and also no approximation is possible, that should be stated. Please reflect this in the bib file by including no date field in the respective entry. It automatically translates to something like *[n.d.]*, based on your language, meaning *no date*.

The biblatex-iso690 package provides new field dateaddon that can be used for date specificities. Description of some known use cases follows.

If the date provided in the primary source of data is obviously incorrect (e.g. 1959), the correction should be supplied in brackets (e.g. [i.e. 1995]):

```
date      = {1959},
dateaddon = {\mkbibbrackets{i.e. 1995}},
```

You can use dateaddon field also for missing dates and their rough approximations (e.g. providing only centuries), or for different calendar systems:

```
dateaddon = {\mkbibbrackets{16th century}},
dateaddon = {Jewish calendar 5685 \mkbibbrackets{1925}},
```

And if you need to use a copyright date alongside the publication date, or only a copyright date, you can use dateaddon field as well:

```
date      = {2000},
dateaddon = {\addcomma\space\textcopyright\adnbthinspace 2001},
```

If you have only a copyright date (e.g. © 2001), you can use sortyear field to clarify the sorting, the entry will be sorted by the year (2001) and not the literal value (© 2001):

```
dateaddon = {\textcopyright\adnbthinspace 2001},
sortyear  = {2001},
```

Please also note the syntax for dates – ISO 8601 format (YYYY-MM-DD) is accepted. Please use slash instead of any kind of dash for ranges of dates. If the range is open ended, enter just the first date followed by a slash. And last but not least, use the date field instead of the year field in general. Examples follow:

```
date = {2012-12-21},    % exact date
date = {1998/2001},    % date range
date = {2016/},        % open ended date range
```

2.6.6 Location

If only a limited number of copies of the work exists or the location of a graphic work is essential to its identification, such location (e.g. library or repository) should be stated in a reference. The field `library` serves for this purpose, see ([gosse1912garden](#)).

3 Revision history

0.4.0 2020-03-25

Fixed deprecated name handling

Declared mapping suffix (`<lang>-iso.lbx`) for localization files

Updated and improved documentation, README, and bib examples

Delimiters defined by the new way

Refined date and names macros

Added date circa 2.6.5

Added dateaddon field 2.6.5

Commented source code to understand it for others better

Employed standard `\mkbibacro` for DOI, ISBN, ISSN, ISAN, ISMN, ISRN, ISWC (small caps instead of uppercase)

INCOMPATIBLE CHANGE: replaced `classification` with `number` field for patent entries
2.5.1

Added localization strings `director`, `bydirector`, `inventor`, `byinventor`, `online`, `film`

Added Bulgarian and French localization

Increased maximum number of names to print to 99 (9 before)

Removed `biblatex` backwards compatibility code

Fixed printing `url` and `urldate` for `@online` entries

Fixed multiple ISBNs / ISSNs

Allowed the package option `abbreviate=[true|false]` to work for all bibstrings . 2.4.1

Added `\parencite` support for `iso-numeric` style 2.3.1

Added `articlepubinfo` package option 2.4.2

Logging only to `.log` file (no terminal output)

Added support for `report` and `movie` entry types

Added support of localization strings in `howpublished` field 2.6.3

Fixed typos, code improvements

0.3.3 2019-10-30

Documentation with better wording

Enable multilingual references by default 2.4.1

Added `isbn`, `doi`, `url` and `eprint` package options for blocking corresponding fields 2.4.2

Printing out (the same) editors also in the consecutive entries – get rid of the dash as default (iso-authoryear style)

Removed deprecated biblatex options

Changed URL address for DOI records

Clean up of indentation and spacing in the source code

Renamed editor macro to incollection-editor

Added Polish localization

0.3.2 2017-04-25

Synchronized iso-numeric bibliography environment with original numeric style

Added support for alphabetic bibliographic style (iso-alphabetic) 2.2.2

INCOMPATIBLE CHANGE: thesisinfolast package option changed to thesisinforinnotes 2.4.2

README copyediting and conversion to markdown

Various documentation and README corrections and enhancements

Added German localization

0.3.1 2016-05-13

First public release on CTAN 1.3

Added support for thesis entry type 2.5.1

Added support for patent entry type 2.5.1

Added support for including location information (library field) 2.6.6

Added Slovak localization

Removed non-breaking space after standard identifier terms

Streamlined iso-authortitle citation style 2.2.2

Minor documentation corrections

0.3 2016-05-04

A complete refactoring of the style to comply the latest version of the biblatex package as well as ISO 690 international standard 1.1

Added English version of the documentation/user guide (this document)

0.2.1 2016-03-13

Solved issues about punctuation marks and redundant spaces

Compatibility support for the latest version of the biblatex package

Reformatted the driver for inbook entry type

0.2 2015-03-25

Gathered changes during the past four years

Solved issue about the spacing of strings in the main document language

0.1 2011-02-03

| | |
|-------------------------------------------------------------------------------------------------|-----|
| First public release | 1.6 |
| Draft of the documentation (only in Czech) | |
| Support for almost all of the entry types provided by the <code>biblatex</code> package | 2.5 |