ISO 690 biblatex style
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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 CTAN\(^1\) and is included in MiK\TeX 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 License\(^3\).

\(^1\)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:

```latex
\documentclass{article}
\usepackage[english,czech]{babel}
\usepackage{csquotes}
\usepackage[style=iso-authoryear]{biblatex}
\addbibresource{biblatex-iso690-examples.bib}
\begin{document}
\cite{knuth1990virtual}
\printbibliography
\end{document}
```

A minimal working example for polyglossia package:

```latex
\documentclass{article}
\usepackage{polyglossia}
\setmainlanguage{czech}
\setotherlanguage{english}
\usepackage{csquotes}
\usepackage[style=iso-authoryear]{biblatex}
\addbibresource{biblatex-iso690-examples.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.

The affected fields that should be printed as they appear in the original source (in the language of resource, using the langid field) are, e.g. numeration information (volume, number, edition, etc.), while availability and access information (available from), medium designation (howpublished field), pages range, or the relations of subsidiary creators (translated by, revised by, etc.) are examples of using the main document language.

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)

### 2.1.1 Switching multiple languages

Sometimes the main document language is selected in the document class, and the user can only switch the active language, not the main language. This is usually a case of journals/collections of articles that can be prepared (in their entirety) in one main language, but where individual articles might also be written in a different language (e.g., this is the case with csbulletin class). Then you can use currentlang option (see also 2.4.2), which allows switching to the active surrounding language, and print biblatex localization strings accordingly to this currently selected language, not the main language.

The following MWE illustrates switching the active languages (English and German over the main Czech language) on two bibliography entries, one with the Czech langid field and the other without specified language.

```latex
\documentclass{article}
\usepackage[T1]{fontenc}
\usepackage[main=czech,english,ngerman]{babel}
\usepackage{csquotes}
\usepackage[style=iso-numeric,currentlang]{biblatex}
\addbibresource{biblatex-iso690-examples.bib}
\begin{document}
\nocite{tex:zpravodajchlebikova91}
\nocite{tex:zpravodajchlebikova91cz}
\printbibliography
\selectlanguage{english}
\printbibliography
\selectlanguage{ngerman}
\printbibliography
\end{document}
```
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 \textit{iso-authoryear} method (and possibly also for other methods \textit{iso-alphabetic} and \textit{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 \texttt{textcite}.

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

2.4 Package options

2.4.1 Provided by \texttt{biblatex} by default

Frequently used package options are:

\begin{description}
  \item[style=iso-authoryear, iso-numeric, iso-alphabetic, iso-authortitle] Style to be used for bibliography references and citations. Four possibilities are available for the \texttt{biblatex-iso690} package, see 2.2 for details.
  \item[backend=biber, bibtex, bibtex8] Backend program for generating bibliographic entries. \texttt{biber} is the default one for the \texttt{biblatex} package, providing a large variety of features. Other options are \texttt{bibtex} and \texttt{bibtex8}, but they both are far behind the possibilities of \texttt{biber}. \texttt{biber} is the recommended backend.
  \item[autolang=other, see \texttt{biblatex} documentation for more options] Controls which language environment is used. The default value for this package is \texttt{other}, which encloses the \texttt{bib} entry in an \texttt{otherlanguage} environment and prints localization terms in the language of the resource or uses language-specific hyphenation. Use the \texttt{langid} field in \texttt{bib} entry to specify its language.
  \item[sortlocale=auto, \texttt{(locale)}] Responsible for sorting the bibliography according to the entered \texttt{(locale)} identifier. The default value is \texttt{auto}, meaning the \texttt{(locale)} is set to the main document language identifier (if \texttt{b babel/polyglossia} is used). A real use case example: this document is in English (main document language), but uses Czech sorting (\texttt{sortlocale=cs\_CZ}).
\end{description}

2.4.2 Provided by \texttt{biblatex-iso690} in addition

\begin{description}
  \item[spacecolon=true, false] default: \texttt{false}
  If \texttt{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 \texttt{false}.
\end{description}
pagetotal=true, 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  

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  

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  

Enable or disable printing of the DOI number.

isbn=true, false  

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

eprint=true, false  

Enable or disable printing of the eprint field.

url=true, false  

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  

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.

currentlang=true, false  

By default, the main document language is used for printing of bibliography strings. Some classes load the babel package and user cannot select the main document language easily. With this option, the currently selected language will be used instead (see also 2.1.1).

noenddot=true, false  

Enable or disable printing an end dot at the very end of bibliography entries. The default value is false, meaning a dot is printed at the end.
2.5 Database guide

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

**Book**


```latex
@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**


```latex
@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},
  bookssubtitle = {Reconfiguring Academic Information Resources for the 21st Century},
}
```
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:


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

```latex
@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**


```latex
@article{lynch2005where,
  author = {Lynch, Clifford},
  title = {Where Do We Go From Here?},
}
```
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 \texttt{urldate} field (see \ref{sec:2.6.3}). On the other hand


\begin{verbatim}
@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},
  crossref = {tugboat1980},
}
\end{verbatim}

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.

\subsection{Specific entry types}

\textbf{Thesis}

The thesis entry type and its aliases mastersthesis and phdthesis are available by default for thesis works. Use the \texttt{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 \textit{biblatex} documentation. Available terms are \texttt{bathesis}, \texttt{mathesis}, \texttt{phdthesis}, and \texttt{candthesis}. Names of the supervisor and school (institution) can be entered into the fields \texttt{supervisor} and \texttt{institution}, respectively.


```latex
@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/},
}
```

\textbf{Patent}

The dominant role as an author has the holder of a patent (\texttt{holder} field). The subsidiary author is an inventor (if known) of the patent (\texttt{author} field). Application date fits in the \texttt{origdate} field, while date of publication in the \texttt{date} field. The field number is available for the patent classification or request number. For the patent type, we can use localization strings as well, e.g. \texttt{patenteu}.


```latex
@patent{groll2008method,
  holder = {{Clad Metals LLC Canonsburg, PA 15317 (US)}},
  title = {Method of making a copper core five-ply composite and cooking vessel},
  author = {Groll, W. A.},% <---------- inventor
  publisher = {Google Patents},
  number = {EP 1 094 937 B1},
  type = {patenteu},
  date = {2008-07-30},% <---------- publication date
  origdate = {1999-05-04},% <---------- application date
}
```
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. Please note that organization names (so-called corporate authors) need to be protected with doubled curly braces to avoid being (mis)parsed into family/given names (resulting in wrong order and formatting).

\begin{verbatim}
author = {{Dialog Information Services}},
\end{verbatim}

If the author 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:

\begin{verbatim}
editora = {Welles, Orson},
editoratype = {director},
\end{verbatim}

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 (Gorki, 1955).

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:

\begin{verbatim}
editor = {Humphrey Appleby and others},
\end{verbatim}

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 (Gorki, 1955).

Note that also other `titleaddon` fields are supported by default.
2.6.3 Medium type

The field \texttt{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 \texttt{urldate} field) is \texttt{[online]}, even without

\begin{verbatim}
howpublished = {online},
\end{verbatim}

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

2.6.4 Edition

The \texttt{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 \texttt{bib} file.

The \texttt{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. \texttt{ca.}). To achieve this behavior, specify the date followed by a tilde, as in the example below:

\begin{verbatim}
date = {1490~}, \hspace{1cm} \% tilde meaning circa
\end{verbatim}

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

The \texttt{biblatex-iso690} package provides new field \texttt{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. \texttt{1959}), the correction should be supplied in brackets (e.g. [\textit{i.e. 1995}]):

\begin{verbatim}
date = {1959},
dateaddon = {\texttt{mkbibbrackets}\textit{i.e. 1995}},
\end{verbatim}

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

\begin{verbatim}
dateaddon = {\texttt{mkbibbrackets}\textit{16th century}},
dateaddon = {\texttt{mkbibbrackets}\textit{1925}},
\end{verbatim}

And if you need to use a copyright date alongside the publication date, or only a copyright date, you can use \texttt{dateaddon} field as well:
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\addnbthsinspace 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 (Gosse, 1912).

### 3 Reference bibliography

APPLEBY, Humphrey et al. (eds.), [ca. 1452–]. Thinking and Writing. A periodical with an open ended date range.


APPLEBY, Humphrey, 1959 [i.e. 1995]. How to supply a correct date. A book with a corrected date.


Macbeth, 1948 [film]. Directed by WELLES, Orson. United States: Republic Pictures. ISAN 0000-0000-3B1A-0000-2-0000-0000-V.


4 Revision history

0.4.1 2022-03-20

Added currentlang package option. ........................................... 2.4.2
Added mapping from \ngerman to \german language.
Added Spanish language support.
Removed \inputenc package from examples.
Added expl3 package in the documentation to fix compilation error.
Prevent capitalisation of the [online] bibliography string. ............ 2.6.3
Fix punctuation before \urldate if publisher info is missing.
Print organization field in publisher location+publisher list.
Improved support for \@patent entries. .................................... 2.5.1
Improved documentation.
Fixed missing \volume and \volumes fields.
Added noenddot package option. .......................................... 2.4.2

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 \datedate and names macros
Added \datedate circa ............................................................ 2.6.5
Added \datedateaddon 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 / ISSN
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
Fixed typos, code improvements

0.3.3  2019-10-30
Documentation with better wording
Enable multilingual references by default
Added isbn, doi, url and eprint package options for blocking corresponding fields
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)
INCOMPATIBLE CHANGE: thesisinfo last package option changed to thesisinfo in notes
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
Added support for thesis entry type
Added support for patent entry type
Added support for including location information (library field)
Added Slovak localization
Removed non-breaking space after standard identifier terms
Streamlined iso-author-title citation style
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
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 \texttt{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 \biblatex\ package .... 2.5