

*by the Ad-Hoc Committee on Encoding of Bibliographic Citations
(Kevin Hawkins, Martin Holmes, & Laurent Romary)*

Background

The TEI Guidelines offer three elements for bibliographic descriptions:

- `bibl` -- no enforced content structure
- `biblStruct` -- structured citation follows a TEI content model
- `biblFull` -- structured citation with a content model similar to `fileDesc`

These elements may be used for a number of different purposes in a TEI document. They may occur within the `<teiHeader>` to describe the source of a TEI document (as part of the metadata) or within the `<text>` to describe citations appearing as content. As with other elements used in the body, any of these three elements could be used either:

- to represent citations in a source document (such as a pre-existing print document)
- to encode citations as part of a publishing process (such as a manuscript of a book to be published), whether destined for print publication, online publication, or both.

Principles

The following principles have informed these revisions:

1. Names should always be fully marked up in `<biblStruct>`s. If the purpose of `<biblStruct>` is to facilitate mechanical data parsing, it's essential to be able to separate forenames from surnames.
2. We prefer `<persName>`, `<placeName>`, and `<orgName>` to `<name type="whatever">`.
3. Punctuation should be kept outside data tags, otherwise a processor will be retrieving (for instance) names with commas in them.
4. Use of `@level` should be encouraged everywhere. It is often simple to deduce the level from the surrounding structure, but not always, so providing it is good practice.
5. `<ref>` should be available everywhere, so that URIs for electronic documents can be supplied at all levels.
6. Date values should be stored in `@when` wherever possible, so they can be validated.
7. Examples should not arbitrarily mix `<biblStruct>`s and `<bibl>`s in the same context; this is unlikely to happen, and seems needlessly confusing.
8. Values for `biblScope/@type` in the examples should be consistent with the suggested values in the `<biblScope>` element definition (i.e. "pp", not "pages", and "chap", not "chapter"). Ditto with `title/@type` ("sub", not "subordinate").

If these principles are agreed, then the majority of changes proposed below follow from them.

Proposed revisions

Below are suggested revisions to § 2.7 and § 3.11 of the Guidelines. These revisions will need some further copyediting to make the style fully consistent with the rest of the Guidelines, so if the Council adopts these changes, it should come with the assumption that further stylistic changes will still be needed.

Revisions are presented in a word processor format to make changes easy to read. Revisions up to § 3.11.1 simply using the revision tracking feature of this word processor file format, whereas revisions beginning with § 3.11.1 require more detailed annotation and therefore is presented in a three-column layout.

Revisions to § 2.7 attempt to clarify some outdated information and give more context to the discussion of cataloguing and citation practices and their relation to the TEI header. These revisions do not depend on or relate directly to revisions to § 3.11 but were informed in part by our thinking about § 3.11.

2.7 Note for Library Cataloguers

A strong motivation in preparing the material in this chapter was to provide in the TEI file header a viable chief source of information for cataloguing computer files. The file header is not a library catalogue record, and so will not make all of the distinctions essential in standard library work. It also includes much information generally excluded from standard bibliographic descriptions. It is the intention of the developers, however, to ensure that the information required for a catalogue record be retrievable from the TEI file header, and moreover that the mapping from the one to the other be as simple and straightforward as possible. Where the correspondence is not obvious, it may prove useful to consult one of the works which were influential in developing the content of the TEI file header. These include:

ISBD(G)

The International Standard Book Description (General) is an international standard setting out what information should be recorded in a description of a bibliographical item. There are also separate ISBDs covering different types of material, e.g. ISBD(M) for monographs, ISBD(ER) for electronic resources. These separate ISBDs follow the same general scheme as the main ISBD(G), but provide appropriate interpretations for the specific materials under consideration.

AACR2

The Anglo-American Cataloguing Rules, Second Edition, 2002 Revision: 2005 Update are the official guidelines for the construction of catalogues in general libraries in the English-speaking world. Other national cataloguing codes exist as well. AACR2 is explicitly based on the general framework of the ISBD(G) and the subsidiary ISBDs: it gives a description of how to ~~catalogue items according to the ISBDs, and how to construct indexes and cross-references~~ describe bibliographic items and how to create access points such as subject and name headings and uniform titles. Other national standards include NF Z 44, Regeln für die alphabetische Katalogisierung (RAK), Regole italiane di catalogazione per autori (RICA), and FOCT 7.1.

ANSI/NISO Z.39.29

ANSI/NISO Z.39.29 is an American national standard governing bibliographic references for use in bibliographies, end-of-work lists, references in abstracting and indexing publications, and outputs from computerized bibliographic data bases. This standard ~~has however now been withdrawn, pending substantial revisions~~ is currently under periodic review. The ~~international standard which covers the same area~~ related ISO

standard is ISO 690:~~1987~~. Other relevant national standards include BS 1629:1989, BS 5605:1978, ~~and~~ BS 6371:1983, DIN 1505-2, and ГОСТ 7.0.5.

Since the TEI file description elements are based on the ISBD areas, once can use the content of file description as the basis for a catalog record for a TEI document. Among the divergences between the TEI file description and AACR2 which prevent automatic generation of catalogue records from TEI headers or generation of TEI headers from catalogue records are the following:

- The TEI title statement uses a different taxonomy of title types than that used in transcription of the title proper and other title information in AACR2.
- The TEI title statement contains authors, editors, and other responsible parties in separate elements, with names likely normalized, not transcribed as a single statement of responsibility from the chief source of information.
- The components of the TEI file description do not prescribe that data be transcribed according to AACR2 rules.
- There is no place in a TEI header to specify main or added entries for the catalogue record.
- The TEI header does not require use of a particular vocabulary of subject headings or even the use of subject headings at all.

3.11 Bibliographic Citations and References

Bibliographic references (that is, full descriptions of bibliographic items such as books, articles, films, broadcasts, songs, etc.) or pointers to them may appear at various places in a TEI text. They are required at several points within the TEI Header's source description, as discussed in section 2.2.7 The Source Description; they may also appear within the body of a text, either singly (for example within a footnote), or collected together in a list as a distinct part of a text; detailed bibliographic descriptions of manuscript or other source materials may also be required. These Guidelines propose a number of specialised elements to encode such descriptions, which together constitute the model.biblLike class. By default, this class has the following members:

- bibl (bibliographic citation) contains a loosely-structured bibliographic citation of which the sub-components may or may not be explicitly tagged.
- biblStruct (structured bibliographic citation) contains a structured bibliographic citation, in which only bibliographic sub-elements appear and in a specified order.
- biblFull (fully-structured bibliographic citation) contains a fully-structured bibliographic citation, in which all components of the TEI file description are present.

Lists of such elements may also be encoded using the following element:

- listBibl (citation list) contains a list of bibliographic citations of any kind.

In printed texts, the individual constituents of a bibliographic reference are conventionally marked off from each other and from the flow of text by such features as bracketing, italics, special punctuation conventions, underlining, etc. In electronic texts, such distinctions are also important, whether in order to produce acceptably formatted output or to facilitate intelligent retrieval processing, 14 quite apart from the need to distinguish the reference itself as a textual object with particular linguistic properties.

It should be emphasized that for references as for other textual features, the primary or sole consideration is not how the text should be formatted

when it is printed. The distinctions permitted by the scheme outlined here may not necessarily be all that particular formatters or bibliographic styles require, although they should prove adequate to the needs of many such commonly used software systems. 15 The features distinguished and described below (in section 3.11.2 Components of Bibliographic References) constitute a set which has been useful for a wide range of bibliographic purposes and in many applications, and which moreover corresponds to a great extent with existing bibliographic and library cataloguing practice. For a fuller account of that practice as applied to electronic texts see section 2.2.7 The Source Description; for a brief mention of related library standards see section 2.7 Note for Library Cataloguers.

The two most commonly used elements in the model.biblLike class are <biblStruct> and <bibl>. <biblStruct> will usually be easier to process mechanically than <bibl> because its structure is more constrained and predictable. It is suited to situations in which the objective is to encode bibliographic information in such a way that it is machine-readable by external systems or can be converted into other bibliographic markup formats such as BibTeX or MODS. Punctuation delimiting the components of a print citation is typically not included anywhere in a <biblStruct> because the presence and order of child elements can be used to reconstruct this punctuation and because, since biblStruct permits only child elements but not character data as content, there is no place to put the punctuation. While <biblStruct> offers enough flexibility for encoding bibliographic references to simple print works, for many documents, especially electronic ones, it proves problematic.

On the other hand, <bibl> allows for more flexibility in that it can include delimiting punctuation and textual content not wrapped in child elements, and its constituents can be ordered in any way. This makes it suitable for marking up bibliographies in existing documents, in which it is important to preserve the form of references in the original document but where it is also desirable to tag important information such as authors, dates, publishers, and so on. <bibl> is also useful when encoding "born-digital" documents, especially when you know in advance the specific style guide which will be used when rendering the content, because it is much easier to provide all the information for a reference in the exact sequence required by the target rendering, including any necessary punctuation and linking words, and then tag the constituents appropriately, than it is to encode the reference using a <biblStruct> and then re-order and punctuate the data using XSLT or a similar method in order to create the rendered output.

The third element in the model.biblLike class, <biblFull>, has nearly the same content model as <fileDesc>, an element of the header. Both are based on the International Standard for Bibliographic Description (ISBD), on which some national standards for bibliographic citations are based. The order of child elements in both <biblFull> and <fileDesc> both correspond to the order of bibliographic description "areas" in ISBD with two exceptions. First, <extent> corresponds to the physical description area in ISBD, which appears just after the publication, production, distribution, etc. area in ISBD, not before it as in TEI. Second, <biblFull> and <fileDesc> use the child element <publicationStmt> to cover not only the publication, production, distribution, etc. area but also the resource identifier and terms of availability area. Despite these inconsistencies, users encoding citations and attempting to format them according to a standard that closely adheres to ISBD may find that <biblFull>, used with its child elements and without delimiting punctuation, provides an appropriate granularity of encoding with elements that can easily be rendered for the reader. However, it is important to note that ISBD-derived citation formats (such as ANSI/NISO Z39.29 and GOCT 7.1) usually begin with a statement of authorship that does not map to the ISBD statement of responsibility and which, therefore, cannot be encoded anywhere inside of a <biblFull> (or <fileDesc>).

Original	Proposed Revision	Notes
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<p><i>3.11.1 Elements of Bibliographic Reference</i></p>	<p><i>3.11.1 Methods for Encoding Bibliographic References and Lists of References</i></p>	<p>This section doesn't discuss the various child elements but rather the choice among members of model.bibLike.</p>
<p>The members of the model.bibLike class all share a number of possible component sub-elements. For the bibl and biblStruct elements, exactly the same sub-elements are concerned, and they are described together in section 3.11.2 Components of Bibliographic References; for the biblFull element, the sub-elements concerned are fully described in section 2.2 The File Description.</p>		
<p>Different levels of specific tagging may be appropriate in different situations. In some cases, it may be felt necessary to mark just the extent of the reference itself, with perhaps a few distinctions being made within it (for example, between the part of the reference which identifies a title or author and the rest). Such references, containing a mixture of text with specialized bibliographic elements, are regarded as bibl elements, and tagged accordingly. For example:</p>		

<p><p>A book which had a great influence on him was < bibl>Tufte's < title>Envisioning Information</ title> </ bibl>, although he may never have actually read it.</ p></p>		
<p>Some bibliographic references are extremely elliptical, often only a string of the form <i>Baxter, 1983</i>. If no further details of Baxter's book are given in the source text and none are supplied by the encoder, then the reference thus given should be tagged as a bibl:</p>		
<p>All of this is of course much more fully treated in < bibl>Baxter, 1983</ bibl>.</p>		
<p>In general, however, normal modern bibliographic practice, and these Guidelines, distinguish between a bibliographic reference, which is a self-sufficient description of a bibliographic item, and a bibliographic pointer, which is a short-form citation (e.g. <i>Baxter, 1983</i>) which serves usually as a place-holder or pointer to a full long-form reference found elsewhere in</p>		

<p>the text. The usual encoding of short-form references such as <i>Baxter, 1983</i> is not as bibl elements but as cross-references to such elements; see section 3.11.3 Bibliographic Pointers below.</p>		
<p>In cases where the encoder wishes to impose more structure on the bibliographic information, for example to make sure it conforms to a particular stylesheet or retrieval processor, the biblStruct element should be used. Note that several of the features in this and later examples are explained later in the current section.</p>		
<pre><biblStruct> <monogr> <author>Edward R. Tufte</author> <title>Envisioning Information</title> <imprint> <pubPlace>Cheshire, Conn.</pubPlace> <publisher>Graphics Press</publisher> <date>1990</date> </imprint> </monogr> </biblStruct></pre>	<pre><biblStruct> <monogr> <author> <persName> <forename>Edward R.</forename> <surname>Tufte</surname> </persName> </author> <title level="m">Envisioning Information</title> <imprint> <pubPlace>Cheshire, Conn.</pubPlace> <publisher>Graphics Press</publisher> <date when="1990"></date> </imprint> </monogr></pre>	<p>Name markup is essential for proper indexing and other forms of processing. It seems advisable that all biblStruct examples use it, since the purpose of biblStruct is to provide a highly-structured reference. Simpler uses of author and editor will be included in examples with bibl below (e.g. § 3.11.2.2).</p> <p>We propose the use of @level wherever possible, for maximum clarity. Often, the @level value may be predictable from the parent element (analytic and level="a"), but often it's not (level="j" and level="u").</p>

	</biblStruct>	<p>Use of @when enforces a standardized date format, so it's advisable wherever practical.</p> <p>The <date> element is not collapsed, although KH says it should be. MH remembers seeing a W3C document suggesting that empty tags should only be self-closing if they have an empty content model (i.e. cannot contain content) but can't find this document. We need to discuss this.</p>
<p>A more complex and detailed bibliographic structure is provided by the biblFull element defined in the TEI header module. This element is provided as a means of embedding the file description of one existing digital text within that of another (see further section 2.2 The File Description); however, its use is not confined to digital texts, and it may be used in the same way as any other bibliographic element, as in this example:</p>		
<pre><biblFull> <titleStmt> <title>Envisioning Information</title> <author>Tufte, Edward R[olf]</author> </titleStmt> <extent>126 pp.</extent> <publicationStmt> <publisher>Graphics Press</publisher></pre>		

<pre><pubPlace>Cheshire, Conn. USA</pubPlace> <date>1990</date> </publicationStmt> </biblFull></pre>		
<p>A list of bibliographic items, of whatever kind, may be treated in the same way as any other list (see section 3.7 Lists). Alternatively, the specialized listBibl element may be used. The difference between the two is that a list contains item elements, within which bibliographic elements (bibl, biblStruct, or biblFull) may appear, as well as other phrase- and paragraph-level elements, whereas the listBibl may contain only bibliographic elements, optionally preceded by a heading and a series of introductory paragraphs. The former would be appropriate for a list of bibliographic elements in which descriptive prose predominated, and the latter for a more formal bibliography. The following are thus both legal encodings of a list of bibliographic entries: a listBibl:</p>		
<pre><listBibl> <head>Bibliography</head> <biblStruct xml:id="NELSON80"></pre>	<pre><listBibl> <head>Bibliography</head> <biblStruct xml:id="NELSON80"> <analytic></pre>	<p>The mixing of biblStruct with bibl elements in the same listBibl is slightly confusing and the text gives no justification for it, so the two bibl elements have been expanded to</p>

```

<analytic>
  <author>Nelson, T.
H.</author>
  <title>Replacing the printed
word:
  a complete literary
system.</title>
</analytic>
<monogr>
  <title>Information
Processing '80: Proceedings of
the IFIPS
  Congress, October
1980</title>
  <editor>Simon H.
Lavington</editor>
  <imprint>
  <publisher>North-
Holland</publisher>

<pubPlace>Amsterdam</pub
Place>
  <date>1980</date>
  </imprint>
  <biblScope>pp 1013-23
</biblScope>
</monogr>
  <note>Apparently a draft of
section 4 of
  <title>Literary
Machines</title>.</note>
</biblStruct>
<bibl
xml:id="NELSON88">Ted
Nelson: <title>Literary
Machines</title>

```

```

<author>
  <persName>
    <forename>T.H.</forename>
    <surname>Nelson</surname>
  </persName>
</author>
<title level="a">Replacing the printed word:
  a complete literary system.</title>
</analytic>
<monogr>
  <title level="m">Information Processing '80: Proceedings of the IFIPS
  Congress, October 1980</title>
  <editor>
    <persName>
      <forename>Simon H.</forename>
      <surname>Lavington</surname>
    </persName>
  </editor>
  <imprint>
    <publisher>North-Holland</publisher>
    <pubPlace>Amsterdam</pubPlace>
    <date when="1980"></date>
  </imprint>
  <biblScope type="pp">1013-23</biblScope>
</monogr>
  <note>Apparently a draft of section 4 of
  <ref target="#NELSON88"><title level="m">Literary
Machines</title></ref>.</note>
</biblStruct>

<biblStruct xml:id="NELSON88">
  <monogr>
    <author>
      <persName>
        <forename>Ted</forename>
        <surname>Nelson</surname>

```

full biblStructs.

Name markup has been added, along with date/@when.

@type="pp" has been added to biblScope, in accordance with recommendations later in the chapter. The prefix "pp." in <biblScope> has been removed, because it's superfluous and style-specific; if the objective is to provide "pure" data in biblStruct, without punctuation and other rendering components, then "pp." should not be there.

"pp" has been chosen over the alternative "pages" because it's specifically recommended in the element definition of biblScope.

<pre>(privately published, 1987)</bibl> <bibl xml:id="BAXTER88"> <author>Baxter, Glen</author> <title>Glen Baxter His Life: the years of struggle</title> London: Thames and Hudson, 1988. </bibl> </listBibl></pre>	<pre></persName> </author> <title level="m">Literary Machines</title> <imprint> <date when="1987"></date> </imprint> </monogr> <note>(privately published, 1987)</note> </biblStruct> <biblStruct xml:id="BAXTER88"> <monogr> <author> <persName> <surname>Baxter</surname> <forename>Glen</forename> </persName> </author> <title level="m">Glen Baxter His Life: the years of struggle</title> <imprint> <pubPlace>London</pubPlace> <publisher>Thames and Hudson</publisher> <date when="1988"></date> </imprint> </monogr> </biblStruct> </listBibl></pre>	
<p>3.11.2 Components of Bibliographic References</p>		
<p>This section discusses a number of very commonly occurring component elements of bibliographic</p>	<p>This section discusses commonly occurring components of bibliographic references and elements used for encoding them. They fall into four groups:</p> <ul style="list-style-type: none"> elements for grouping components of the <i>analytic, monographic,</i> 	

references. They fall into four groups:

- elements for grouping components of the *analytic*, *monographic*, and *series* levels in a structured bibliographic reference
- titles of various kinds, and statements of intellectual responsibility (authorship, etc.)
- information relating to the publication, pagination, etc. of an item (most of these constitute the default members of the `model.biblPart` class)
- annotation, commentary, and further detail

and *series* levels in a structured bibliographic reference

- titles of various kinds, and statements of intellectual responsibility (authorship, etc.)
- information relating to the publication, pagination, etc. of an item (most of these constitute the default members of the `model.biblPart` class)
- annotation, commentary, and further detail

The following sections describe the elements which may be used to represent such information within a `bibl` or `biblStruct` element. Within the former, elements from the `model.biblPart` class, other phrase-level elements, and plain text may be combined without other constraint; within the latter, such of these elements as exist for a given reference must be

<p>distinguished, and must also be presented in a specific order, discussed further below (section 3.11.2.7 Order of Components within References).</p>		
<p>3.11.2.1 Analytic, Monographic, and Series Levels</p>		
<p>In common library practice a clear distinction is made between an individual item within a larger collection and a free-standing book, journal, or collection. Similarly a book in a series is distinguished sharply from the series within which it appears. An article forming part of a collection which itself appears in a series thus has a bibliographic description with three quite distinct levels of information:</p>		
<ol style="list-style-type: none"> 1. the analytic level, giving the title, author, etc., of the article; 2. the monographic level, giving the title, editor, etc., of the collection; 3. the series level, giving the title of the series, possibly the names of its editors, etc., and the number of the volume 		

<p>within that series.</p>		
<p>In the same way, an article in a journal requires at least two levels of information: the analytic level describing the article itself, and the monographic level describing the journal. These three levels may be distinguished within a bibl element, and must be distinguished within a biblStruct element if present, by means of the following elements:</p>		<p>This paragraph seems to suggest (and MH agrees) that while the levels MUST be distinguished in <biblStruct>, they also MAY be distinguished in <bibl>; however, according to the content model of bibl, analytic and monogr are not permitted inside it. This is the subject of bug report 2987241 in the SF Tracker: https://sourceforge.net/tracker/?func=detail&aid=2987241&group_id=106328&atid=644062</p>
<ul style="list-style-type: none"> • analytic (analytic level) contains bibliographic elements describing an item (e.g. an article or poem) published within a monograph or journal and not as an independent publication. • monogr (monographic level) contains bibliographic elements describing an item (e.g. a book or journal) published as an independent item (i.e. as a separate physical object). • series (series information) contains 		

<p>information about the series in which a book or other bibliographic item has appeared.</p>		
<p>For purposes of TEI encoding, journals and anthologies are both treated as monographs; a journal title will thus be tagged as a <title level="j"> element, or simply as a title within a monogr element. Individual articles in the journal or collected texts should be treated at the 'analytic' level. When an article has been printed in more than one journal or collection, the bibliographic reference may have more than one monogr element, each possibly followed by one or more series elements. A series element always relates to the most recently preceding monogr element. (Whether reprints of an article are treated in the same bibliographic reference or a separate one varies among different styles. Library lists typically use a different entry for each publication, while academic footnoting practice typically treats all publications of the same article in a single entry.)</p>	<p>For purposes of TEI encoding, journals and anthologies are both treated as monographs; a journal title will thus be tagged as a <title level="j"> element, or simply as a title within a monogr element. Individual articles in the journal or collected texts should be treated at the 'analytic' level. When an article has been printed in more than one journal or collection, the bibliographic reference may have more than one monogr element, each possibly followed by one or more series elements. A series element always relates to the most recently preceding monogr element. (Whether reprints of an article are treated in the same bibliographic reference or a separate one varies among different styles. Library lists typically use a different entry for each publication, while academic footnoting practice typically treats all publications of the same article in a single entry.)</p>	<p>The suggestion that journal titles should be tagged as titles without @level has been removed; this is potentially confusing, since without @level="j" it would be difficult to determine programmatically that we are dealing with a journal. The status of journals as monographs has raised some questions from KH.</p> <p>Another, more abstract point on "A series element always relates to the most recently preceding": MH has never really liked the idea that an arrangement of siblings is used to model a relationship which is actually that of container/contained: series contains monograph contains analytic, in actuality, so should the tagging not reflect this as a hierarchy? This is more of a question for P6, though, since it would break backward compatibility.</p>

<p>For example, the article cited in this example has been published twice, once in a journal and once in a collection which appeared in a German language series:</p>		
<pre> biblStruct> <analytic> <author>Thaller, Manfred</author> <title level="a">A Draft Proposal for a Standard for the Coding of Machine Readable Sources</title> </analytic> <monogr> <title level="j">Historical Social Research</title> <imprint> <biblScope type="vol">40</biblScope> <date>October 1986</date> <biblScope type="pages">3- 46</biblScope> </imprint> </monogr> <monogr> <title level="m">Modelling Historical Data: Towards a Standard for Encoding and Exchanging Machine- Readable Texts</title> <editor>Daniel I. Greenstein</editor> <imprint> </pre>	<pre> <biblStruct> <analytic> <author> <persName> <forename>Manfred</forename> <surname>Thaller</surname> </persName> </author> <title level="a">A Draft Proposal for a Standard for the Coding of Machine Readable Sources</title> </analytic> <monogr> <title level="j">Historical Social Research</title> <imprint> <biblScope type="vol">40</biblScope> <date when="1986-10">October 1986</date> <biblScope type="pp">3-46</biblScope> </imprint> </monogr> <monogr> <title level="m">Modelling Historical Data: Towards a Standard for Encoding and Exchanging Machine-Readable Texts</title> <editor> <persName> <forename>Daniel I.</forename> <surname>Greenstein</surname> </persName> </editor> <imprint> </pre>	<p>Name markup elaborated in author, editor, and respStmt.</p> <p>@when added to date. Note that the text content here has been left in place, in case the form of the month is required. In some cases this is essential — for instance, "Spring 1980" cannot be rendered in ISO format (AFAIK).</p> <p>Changed biblScope/@type from "pages" to "pp", to conform with recommended values in biblScope element definition.</p> <p>Change of name type="org" to orgName. We feel that where such syntactic-sugar elements exist, they should be used.</p> <p>@type="vol" added to the second biblScope ("Band 11").</p>


```

<pubPlace>St.
Katharinen</pubPlace>
<publisher>Max-Planck-
Institut für Geschichte
In Kommission bei
Scripta Mercaturae
Verlag</publisher>
<date>1991</date>
</imprint>
</monogr>
<series xml:lang="de">
<title level="s">Halbgraue
Reihe
zur Historischen
Fachinformatik</title>
<respStmt>
<resp>Herausgegeben
von</resp>
<name
type="person">Manfred
Thaller</name>
<name type="org">Max-
Planck-Institut für
Geschichte</name>
</respStmt>
<title level="s">Serie A:
Historische
Quellenkunden</title>
<biblScope>Band
11</biblScope>
</series>
</biblStruct>

```

```

<pubPlace>St. Katharinen</pubPlace>
<publisher>Max-Planck-Institut für Geschichte
In Kommission bei
Scripta Mercaturae Verlag</publisher>
<date when="1991"></date>
</imprint>
</monogr>
<series xml:lang="de">
<title level="s">Halbgraue Reihe
zur Historischen Fachinformatik</title>
<respStmt>
<resp>Herausgegeben von</resp>
<persName>
<forename>Manfred</forename>
<surname>Thaller</surname>
</persName>
<orgName>Max-Planck-Institut für Geschichte</orgName>
</respStmt>
<title level="s">Serie A: Historische Quellenkunden</title>
<biblScope type="vol">Band 11</biblScope>
</series>
</biblStruct>

```

The practice of analytic vs. monographic citation, as described here, should be distinguished from the

<p>practice of including within one citation a reference to another work, which the encoder considers to be related to in some way: see further 3.11.2.5 Related items below.</p>		
<p>Punctuation should not appear between the elements within a structured bibliographic entry, unless it is contained within the elements it delimits. As the example shows, it is possible to encode the entry without any inter-element punctuation: this facilitates use of the biblStruct element in systems which can render bibliographic references in any of several styles.</p>	<p>Punctuation should not appear between the elements within a structured bibliographic entry encoded with biblStruct or biblFull, unless it is contained within the elements it delimits. As the example shows, it is possible to encode the entry without any inter-element punctuation: this facilitates use of the biblStruct element in systems which can render bibliographic references in any of several styles.</p>	<p>Added "encoded with biblStruct or biblFull" for clarity. We will endorse the inclusion of punctuation in bibl.</p>
	<p>Punctuation may be included in bibliographic markup using bibl; the following example shows an item previously marked up above, this time using bibl instead of biblStruct:</p>	<p>This additional example should help to demonstrate that rich markup can also be supplied using bibl, while allowing us to be faithful to an original source document or to provide easy rendering in a target styleguide.</p>
	<pre><bibl xml:id="NELSON80"> <author> <persName> <surname>Nelson</surname> <forename>T.H.</forename> </persName></author> <date when="1980">1980</date>. <title level="a">Replacing the printed word: a complete literary system</title>. In</pre>	

	<pre> <title level="m">Information Processing '80: Proceedings of the IFIPS Congress, October 1980</title>, ed. <editor> <persName> <forename>Simon H.</forename> <surname>Lavington</surname> </persName> </editor>, <biblScope type="pp">1013-23</biblScope>. <pubPlace>Amsterdam</pubPlace>: <publisher>North- Holland</publisher>. (<note>Apparently a draft of section 4 of <ref target="#NELSON88"><title level="m">Literary Machines</title></ref>.</note>) </bibl> </pre>	
	<p>This example shows the components sequenced and punctuated according to Chicago style (Reference), with appropriate punctuation, but with all the relevant data items marked up appropriately. This markup approach can provide easy rendering, if only one styleguide is targetted, or an original source document uses a specific styleguide, while still allowing for automated recovery of key data items such as names, titles, dates and so on.</p>	
<p>3.11.2.2 Authors, Titles, and Editors</p>		
<p>Bibliographic references typically begin with a statement of the title being cited followed by the names of those intellectually responsible for it. For articles in journals or collections, such statements should appear both for the analytic and for the monographic level. The following elements are provided for tagging such</p>		

<p>elements:</p> <ul style="list-style-type: none"> • title contains a title for any kind of work. • author in a bibliographic reference, contains the name(s) of the author(s), personal or corporate, of a work; for example in the same form as that provided by a recognized bibliographic name authority. • editor secondary statement of responsibility for a bibliographic item, for example the name of an individual, institution or organization, (or of several such) acting as editor, compiler, translator, etc. • respStmt (statement of responsibility) supplies a statement of responsibility for the intellectual content of a text, edition, recording, or series, where the specialized elements for authors, editors, etc. do not suffice or do not apply. • resp (responsibility) contains a phrase 	<ul style="list-style-type: none"> • title contains a title for any kind of work. • author in a bibliographic reference, contains the name(s) of the author(s), personal or corporate, of a work; for example in the same form as that provided by a recognized bibliographic name authority. • editor secondary statement of responsibility for a bibliographic item, for example the name of an individual, institution or organization, (or of several such) acting as editor, compiler, translator, etc. • respStmt (statement of responsibility) supplies a statement of responsibility for the intellectual content of a text, edition, recording, or series, where the specialized elements for authors, editors, etc. do not suffice or do not apply. • resp (responsibility) contains a phrase describing the nature of a person's intellectual responsibility. • name (name, proper noun) contains a proper noun or noun phrase. Where more specific name-related elements exist, such as persName, orgName, placeName etc., these should be preferred. • meeting contains the formalized descriptive title for a meeting or conference, for use in a bibliographic description for an item derived from such a meeting, or as a heading or preamble to publications emanating from it. • sponsor specifies the name of an organization or institution that sponsored the publication. • funder specifies the name of an individual, institution, or organization responsible for funding the publication. • distributor supplies the name of a person or other agency responsible for the distribution of a text. • principal supplies the name of the principal researcher responsible for the creation of a publication. This may be especially useful in the case of an electronic text or project created by a large team, where one it is helpful to identify one 	<p>Under name, added expansion to encourage use of persName, orgName, placeName etc. This raises one interesting issue: should placeName be encouraged inside pubPlace?</p> <p>Added sponsor, funder, distributor and principal, which are increasingly needed when citing large online projects or collaborative publications. Feature request #2976715 on SourceForge requests the addition of these elements to the content model of biblStruct; they are already available in bibl.</p>
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<p>describing the nature of a person's intellectual responsibility.</p> <ul style="list-style-type: none"> • name (name, proper noun) contains a proper noun or noun phrase. • meeting contains the formalized descriptive title for a meeting or conference, for use in a bibliographic description for an item derived from such a meeting, or as a heading or preamble to publications emanating from it. 	<p>principal instigator.</p>	
<p>The elements author, editor, and respStmt are the default members of the model.respLike class, a subclass of the model.biblPart class to which the constituents of the bibl element belong.</p>		
<p>In bibliographic references, all titles should be tagged as such, whether analytic, monographic, or series titles. The single element title is used for all these cases. When it appears directly within an analytic, monogr, or series element, title is interpreted as belonging to the appropriate</p>	<p>In bibliographic references, all titles should be tagged as such, whether analytic, monographic, or series titles. The single element title is used for all these cases. When it appears directly within an analytic, monogr, or series element, title may be interpreted as belonging to the appropriate level. However, we recommend use of the @level attribute in all cases, since the parent element does not always unambiguously signal the level (for instance, monogr can contain both monographic and journal titles). It is a semantic error to give a value for the level attribute which is inconsistent with the context; such values may be ignored. The level value 'a' implies the analytic level; the values m, and</p>	<p>We should encourage the use of @level everywhere, to avoid ambiguity (e.g. in the case of journal titles which are inside monogr).</p> <p>The original claim that only monographs can be unpublished seems odd; this would seem to suggest that (for instance) an unpublished poem is a monograph until it's published, and then it's analytic. This is an</p>

<p>level. When it appears elsewhere, its level attribute should be used to signal its bibliographic level. It is a semantic error to give a value for the level attribute which is inconsistent with the context; such values may be ignored. The level value a implies the analytic level; the values m, j, and u imply the monographic level; the value s implies the series level. Note, however, that the semantic error occurs only if the nested title is directly enclosed by the analytic, monogr, or series element; if it is enclosed only indirectly (i.e., nested more deeply), no semantic error need be present. For example, the analytic title may contain a monographic title:</p>	<p>'j' imply the monographic level; the value 's' implies the series level. The value 'u' may occur at the analytic or monographic level, since documents at both levels may be unpublished. Note, however, that the semantic error occurs only if the nested title is directly enclosed by the analytic, monogr, or series element; if it is enclosed only indirectly (i.e., nested more deeply), no semantic error need be present. For example, the analytic title may contain a monographic title:</p>	<p>issue which requires discussion.</p>
<pre><biblStruct> <analytic> <author>Lucy Allen Paton</author> <title>Notes on Manuscripts of the <title level="m" xml:lang="fr">Prophécies de Merlin</title> </title> </analytic> <monogr> <title level="j">PMLA</title></pre>	<pre><biblStruct> <analytic> <author> <persName> <firstname>Lucy</firstname> <surname>Allen Paton</surname> </persName> </author> <title level="a">Notes on Manuscripts of the <title level="m" xml:lang="fr">Prophécies de Merlin</title> </title> </analytic> <monogr></pre>	<p>Author name markup expanded, and date/@when used instead of text content.</p> <p>@level added to the first title.</p> <p>Changed biblScope/@type from "pages" to "pp", to conform with recommended values in biblScope element definition.</p>

<pre><imprint> <biblScope type="vol">8</biblScope> <date>1913</date> <biblScope type="pages">122</biblScope > </imprint> </monogr> </biblStruct></pre>	<pre><title level="j">PMLA</title> <imprint> <biblScope type="vol">8</biblScope> <date when="1913"></date> <biblScope type="pp">122</biblScope> </imprint> </monogr> </biblStruct></pre>	
<p>In this case, the analytic title 'Notes on Manuscripts of the Prophécies de Merlin' needs no level attribute because it is directly contained by the analytic level; the monographic title contained within it, 'Prophécies de Merlin,' does not create a semantic error because it is not directly contained by the analytic element.</p>	<p>In this case, the monographic title, 'Prophécies de Merlin,' is contained within the analytic title 'Notes on Manuscripts of the Prophécies de Merlin'. This does not create a semantic error because it is not directly contained by the analytic element.</p>	<p>We wish to encourage use of @level.</p>
<p>In some bibliographic applications, it may prove useful to distinguish main titles from subordinate titles, parallel titles, etc. The type attribute is provided to allow this distinction to be recorded.</p>		
<p>The following reference, from a national standard for bibliographic references, illustrates this type of analysis with its distinction between main and subordinate titles.</p>	<p>The following reference, from a national standard for bibliographic references, illustrates this type of analysis with its distinction between main and subordinate titles. Note that this uses the more flexible bibl, rather than the structured biblStruct element: consequently, there is no requirement to tag all the components of the reference (notably the authors), although they may be tagged if required.</p>	<p>Little has been said about <bibl> as an alternative to <biblStruct> as yet, so we want to avoid letting this example give the impression that we're discouraging name tagging inside <bibl>.</p>

<p>Note that this uses the more flexible bibl, rather than the structured biblStruct element: consequently, there is no requirement to tag all the components of the reference (notably the authors).</p>		
<p><bibl>Saarikoski, Pirkko-Liisa, and Paavo Suomalainen, <title level="a" type="main">Studies on the physiology of the hibernating hedgehog, 15</title> <title level="a" type="subordinate">Effects of seasonal and temperature changes on the in vitro glycerol release from brown adipose tissue</title> <title level="j">Ann. Acad. Sci. Fenn., Ser. A4</title> <date>1972</date> <biblScope type="vol">187</biblScope> <biblScope type="pp">1-4</biblScope> </bibl></p>	<p><bibl>Saarikoski, Pirkko-Liisa, and Paavo Suomalainen, <title level="a" type="main">Studies on the physiology of the hibernating hedgehog, 15</title> <title level="a" type="sub">Effects of seasonal and temperature changes on the in vitro glycerol release from brown adipose tissue</title> <title level="j">Ann. Acad. Sci. Fenn., Ser. A4</title> <date>1972</date> <biblScope type="vol">187</biblScope> <biblScope type="pp">1-4</biblScope> </bibl></p>	<p>Changed title/@type="subordinate" to "sub", to conform with the sample values recommended in the title element description.</p> <p>Note that biblScope/@type is already "pp" here, which was inconsistent with "pages" originally used in preceding examples.</p>
<p>Slightly more complex is the distinction made below among main, subordinate, and parallel titles, in an example from the same source (p. 63). The punctuation and the bibliographic analysis are</p>		<p>Is a "not wholly unproblematic" example the best choice here? Could we provide a better one without problems?</p>

those given in ANSI Z39.29-1977; the punctuation is in the style prescribed by the International Standard Bibliographic Description (ISBD). [Note 16: The analysis is not wholly unproblematic: as the text of the standard points out, the first subordinate title is subordinate only to the parallel title in French, while the second is subordinate to both the English main title and the French parallel title, without this relationship being made clear, either in the markup given in the example or in the reference structure offered by the standard.] Again, it is only because this example uses bibl rather than biblStruct, that specific punctuation may be included between the component elements of the reference.

```
<bibl>Tchaikovsky, Peter Ilich.
<title level="m"
type="main">The swan lake
ballet</title>
= <title level="m"
type="parallel"
xml:lang="fr">Le lac des
cygnes</title>
```

```
<bibl>Tchaikovsky, Peter Ilich.
<title level="m" type="main">The swan lake ballet</title>
= <title level="m" type="parallel" xml:lang="fr">Le lac des
cygnes</title>
: <title level="m" type="sub" xml:lang="fr">grand ballet en 4
actes</title>
: <title level="m" type="sub">op. 20</title>
[Score].
```

Changed title/@type="subordinate" to "sub" to conform with recommended value in title element definition.

<p>: <title level="m" type="subordinate" xml:lang="fr">grand ballet en 4 actes</title> : <title level="m" type="subordinate">op. 20</title> [Score]. New York: Broude Brothers; [1951] (B.B. 59). vi, 685 p.</bibl></p>	<p>New York: Broude Brothers; [1951] (B.B. 59). vi, 685 p.</bibl></p>	
<p>The elements author and editor have, for printed books and articles, a fairly obvious significance; for other kinds of bibliographic items their proper usage may be less obvious. The author element should be used for the person or agency with primary responsibility for a work's intellectual content, and the element editor for any others with some responsibility for that content, whether or not they are called 'editor'. An organization such as a radio or television station is usually accounted 'author' of a broadcast, for example, while the author of a Government report will usually be the agency which produced it. A translator, illustrator, or compiler, may however be marked by means of the editor</p>		<p>This paragraph was recently edited by Lou and approved by council following the submission of feature request #2910712.</p>

<p>element, optionally using the role attribute to specify the nature of their responsibility more exactly.</p>		
<p>For anyone else with responsibility for the work, the respStmt element should be used. The nature of the responsibility is indicated by means of a resp element, and the person, organization, etc. responsible by a name, persName, or orgName element. Strings such as 'unknown' may be encoded using the rs element. At least one of the four naming elements (name, persName, orgName, or rs) and one resp element should be given within the respStmt element, followed optionally by any number of any of them.</p>		
<p>Examples of secondary responsibility of this kind include the roles of illustrator, translator, encoder, and annotator. The respStmt element may also be used for editors, if it is desired to record the specific terms in which their role is described.</p>		
<p>Examples of author and editor may be found in sections 3.11.1 Elements of</p>		<p>Again, we have relationships characterized through contiguity rather than hierarchy here.</p>

<p>Bibliographic References, and 3.11.2.1 Analytic, Monographic, and Series Levels; wherever author and editor may occur, the respStmt element may also occur. When one of these elements precedes or immediately follows a title, it applies to that title; when it follows an edition element or occurs within an edition statement, it applies to the edition in question.</p>		<p>One issue with resp, typified by this example, is that the openness of its text content, while providing the flexibility to describe the responsibility in any terms, at the same time makes it impossible for an automated agent to reliably recover the nature of that responsibility. It may encounter:</p> <pre><resp>trans.</resp> <resp>Trans.</resp> <resp>translated by</resp></pre> <p>etc. It would be useful to specify a set of recommended values for @type on resp, but @type is not available on resp or on respStmt. Why?</p>
<p>In this example, the respStmt elements apply to the work as a whole, not merely to the first edition:</p>		
<pre><bibl> <author>Lominadze, D. G.</author> <title level="m">Cyclotron waves in plasma.</title> <respStmt> <resp>translated by</resp> <name>A. N. Dellis;</name> </respStmt> <respStmt> <resp>edited by</resp> <name>S. M. Hamberger.</name> </respStmt></pre>	<pre><bibl> <author>Lominadze, D. G.</author> <title level="m">Cyclotron waves in plasma</title>. <respStmt> <resp>translated by</resp> <name>A. N. Dellis</name> </respStmt>; <respStmt> <resp>edited by</resp> <name>S. M. Hamberger</name> </respStmt>. <edition>1st ed.</edition> <pubPlace>Oxford</pubPlace>: <publisher>Pergamon Press</publisher>,</pre>	<p>Rather than including punctuation inside data tags such as <name>, the punctuation has been moved so that it appears between tags. This means that (for instance) an agent trying to recover the translator's name will recover "A. N. Dellis" rather than "A. N. Dellis;", while an agent rendering the text content for output will still produce the same output, with all the punctuation in the right place.</p> <p>Note that this is what is already done in the Swan Lake example above, so this change also eliminates inconsistency.</p>

<pre> <edition>1st ed.</edition> <pubPlace>Oxford:</pubPlace> <publisher>Pergamon Press,</publisher> <date>1981.</date> <extent>206 p.</extent> <title level="s">International series in natural philosophy.</title> <note place="inline">Translation of: <title xml:lang="ru" level="m">Ciklotronnye volny v plazme.</title> </note> </bibl> </pre>	<pre> <date>1981</date>. <extent>206 p.</extent> <title level="s">International series in natural philosophy</title>. <note place="inline">Translation of: <title xml:lang="ru" level="m">Ciklotronnye volny v plazme</title>. </note> </bibl> </pre>	
<p>In this example, by contrast, the respStmt element applies to the edition, and not to the collection per se (Moser and Tervooren were not responsible for the first thirty-five printings); the elements of the reference have been reordered from their appearance on the title page of the volume in order to ensure the correct relationship of the collection title, the edition statement, and the statement of responsibility.</p>		
<pre> <biblStruct> <monogr xml:lang="de"> <title>Des Minnesangs </pre>	<pre> <biblStruct> <monogr xml:lang="de"> <title level="m">Des Minnesangs Frühling</title> </pre>	<p>Added @level to title. Changed biblScope/@type="volume" to</p>

<p>Frühling</title> <note place="inline">Mit 1 Faksimile</note> <edition>36., neugestaltete und erweiterte Auflage</edition> <respStmt> <resp>Unter Benutzung der Ausgaben von <name>Karl Lachmann</name> und <name>Moriz Haupt</name>, <name>Friedrich Vogt</name> und <name>Carl von Kraus</name> bearbeitet von</resp> <name>Hugo Moser</name> <name>Helmut Tervooren</name> </respStmt> <imprint> <biblScope type="volume">I Texte</biblScope> <pubPlace>Stuttgart</pubPla ce> <publisher>S. Hirzel Verlag</publisher> <date>1977</date> </imprint> </monogr> </biblStruct></p>	<p><note place="inline">Mit 1 Faksimile</note> <edition>36., neugestaltete und erweiterte Auflage</edition> <respStmt> <resp>Unter Benutzung der Ausgaben von <name>Karl Lachmann</name> und <name>Moriz Haupt</name>, <name>Friedrich Vogt</name> und <name>Carl von Kraus</name> bearbeitet von</resp> <name>Hugo Moser</name> <name>Helmut Tervooren</name> </respStmt> <imprint> <biblScope type="vol">I Texte</biblScope> <pubPlace>Stuttgart</pubPlace> <publisher>S. Hirzel Verlag</publisher> <date when="1977"></date> </imprint> </monogr> </biblStruct></p>	<p>"vol". Added @when to date.</p>
<p>Another form of 'responsibility' arises when a</p>		

<p>work is published as the outcome of a conference, workshop or similar meeting. The meeting element may be used to supply this information, as in the following example:</p>		
<pre><biblStruct> <monogr> <title>Proceedings of a workshop on corpus resources</title> <respStmt> <resp>Programme Organizer</resp> <name>Geoffrey Leech</name> </respStmt> <meeting>DTI Speech and Language Technology Club meeting, 3-4 January 1990, Wadham College, Oxford</meeting> </monogr> </biblStruct></pre>		
<p>3.11.2.3 Imprint, Pagination, and Other Details</p>		
<p>By imprint is meant all the information relating to the publication of a work: the person or organization by whose authority and in whose</p>		

<p>name a bibliographic entity such as a book is made public or distributed (whether a commercial publisher or some other organization), the place of publication, and a date. It may also include a full address for the publisher or organization. Full bibliographic references usually specify either the number of pages in a print publication (or equivalent information for non-print materials), or the specific location of the material being cited within its containing publication. The following elements are provided to hold this information:</p>		
<ul style="list-style-type: none"> • imprint groups information relating to the publication or distribution of a bibliographic item. • address contains a postal address, for example of a publisher, an organization, or an individual. • pubPlace (publication place) contains the name of the place where a bibliographic item was published. • publisher provides the 		

name of the organization responsible for the publication or distribution of a bibliographic item.

- date contains a date in any format.
- idno (identifying number) supplies any number or other identifier used to identify a bibliographic item in a standardized way.
- extent describes the approximate size of a text as stored on some carrier medium, whether digital or non-digital, specified in any convenient units.
- biblScope (scope of citation) defines the scope of a bibliographic reference, for example as a list of page numbers, or a named subdivision of a larger work.

The elements biblScope, pubPlace and publisher constitute the special class model.imprintPart; members of this class may appear with a date inside an imprint element

<p>in a specific location within a biblStruct, or alternatively, they may appear alongside any other bibliographic component inside a bibl.</p>		
<p>For bibliographic purposes, usually only the place (or places) of publication are required, possibly including the name of the country, rather than a full address; the element pubPlace is provided for this purpose. Where however the full postal address is likely to be of importance in identifying or locating the bibliographic item concerned, it may be supplied and tagged using the address element described in section 3.5.2 Addresses. Alternatively, if desired, the rs or name elements described in section 3.5.1 Referring Strings may be used; this involves no claim that the information given is either a full address or the name of a city.</p> <p>The name of the publisher of an item should be marked using the publisher element even if the item is made public ('published') by an organization other than a conventional publisher, as is</p>		

<p>frequently the case with technical reports:</p>		
<pre><biblStruct> <monogr> <author>Nicholas, Charles K.</author> <author>Welsch, Lawrence A.</author> <title>On the interchangeability of SGML and ODA</title> <imprint> <pubPlace>Gaithersburg, MD</pubPlace> <publisher>National Institute of Standards and Technology </publisher> <date when="1992- 01">January 1992</date> </imprint> <extent>19 pp.</extent> </monogr> <idno type="NIST">NISTIR 4681</idno> </biblStruct></pre>	<pre><biblStruct> <monogr> <author> <persName> <surname>Nicholas</surname> <forename>Charles K.</forename> </persName> </author> <author> <persName> <surname>Welsch</surname> <forename>Lawrence A.</forename> </persName> </author> <title level="m">On the interchangeability of SGML and ODA</title> <imprint> <pubPlace>Gaithersburg, MD</pubPlace> <publisher>National Institute of Standards and Technology </publisher> <date when="1992-01">January 1992</date> </imprint> <extent>19 pp.</extent> </monogr> <idno type="NIST">NISTIR 4681</idno> </biblStruct></pre>	<p>Added name markup and title/@level.</p>
<p>and with dissertations:</p>		
<pre><biblStruct> <monogr> <author>Hansen, W.</author> <title level="u">Creation of hierarchic text</pre>	<pre><biblStruct> <monogr> <author> <persName> <surname>Hansen</surname> <forename>W.</forename></pre>	<p>Added name markup.</p> <p>The encoding of "Ph.D. Diss." was briefly discussed on the TEI list recently, and KH recommended exactly this formulation: "Ph.D. Diss" as a note, and the institution as</p>

<p>with a computer display</title> <note place="inline">Ph.D. dissertation</note> <imprint> <publisher>Dept. of Computer Science, Stanford Univ.</publisher> <pubPlace>Stanford, CA</pubPlace> <date when="1971-06">June 1971</date> </imprint> </monogr> </biblStruct></p>	<pre></persName> </author> <title level="u">Creation of hierarchic text with a computer display</title> <note place="inline">Ph.D. dissertation</note> <imprint> <publisher>Dept. of Computer Science, Stanford Univ.</publisher> <pubPlace>Stanford, CA</pubPlace> <date when="1971-06">June 1971</date> </imprint> </monogr> </biblStruct></pre>	<p>the "publisher". However, this raises the issue of data recovery again: should an agent be expected to recognize "Ph.D. Diss.", "Ph.D. dissertation", " Ph.D. thesis", and every other possible variant as analogous, or should we be aiming to encode the document type using a formal ontology expressed through an attribute such as @type on biblStruct?</p>
<p>When an item has been reprinted, especially reprinted without change from a specific earlier edition, the reprint may appear in a monogr element with only the imprint and other details of the reprint. In the following example, a microform reprint has been issued without any change in the title or authorship. The series statement here applies only to the second monogr element.</p>		
<pre><biblStruct> <monogr> <author>Shirley, James</author> <title type="main">The gentlemen of Venice</title></pre>	<pre><biblStruct> <monogr> <author> <persName> <surname>Shirley</surname> <forename>James</forename></pre>	<p>Added name markup. Changed title/@type="subordinate" to "sub" to conform with recommended value in title element definition.</p>

```

<title type="subordinate">a
tragi-comedie presented at the
private
house in Salisbury Court by
Her Majesties servants</title>
<note
place="inline">[Microform]</
note>
<imprint>
<pubPlace>London</pubPlace>
<publisher>H.
Moseley</publisher>
<date>1655</date>
</imprint>
<extent>78 p.</extent>
</monogr>
<monogr>
<imprint>
<pubPlace>New
York</pubPlace>
<publisher>Readex
Microprint</publisher>
<date>1953</date>
</imprint>
<extent>1 microprint card,
23 x 15 cm.</extent>
</monogr>
<series>
<title>Three centuries of
drama: English, 1642-
1700</title>
</series>
</biblStruct>

```

```

</persName>
</author>
<title type="main" level="m">The gentlemen of Venice</title>
<title type="sub" level="m">a tragi-comedie presented at the private
house in Salisbury Court by Her Majesties servants</title>
<note place="inline">[Microform]</note>
<imprint>
<pubPlace>London</pubPlace>
<publisher>H. Moseley</publisher>
<date when="1655"></date>
</imprint>
<extent>78 p.</extent>
</monogr>
<monogr>
<imprint>
<pubPlace>New York</pubPlace>
<publisher>Readex Microprint</publisher>
<date when="1953"></date>
</imprint>
<extent>1 microprint card, 23 x 15 cm.</extent>
</monogr>
<series>
<title level="s">Three centuries of drama: English, 1642-
1700</title>
</series>
</biblStruct>

```

Added @level to titles.

Changed dates to use @when.

<p>An alternative way of handling the above situation would be to use the relatedItem element described in section 3.11.2.5 Related items below.</p>		
<p>A bibliographic description, particularly for an analytic title, will often include some additional information specifying its location, for example as a volume number, page number, range of page numbers, or name or number of a subdivision of the host work. The element biblScope may be used to identify such information if it is present. Where it is desired to distinguish different classes of such information (volume number, page number, chapter number, etc.), the type attribute may be used with any convenient typology.</p>	<p>A bibliographic description, particularly for an analytic title, will often include some additional information specifying its location, for example as a volume number, page number, range of page numbers, or name or number of a subdivision of the host work. The element biblScope may be used to identify such information if it is present. Where it is desired to distinguish different classes of such information (volume number, page number, chapter number, etc.), the type attribute may be used with any convenient typology (see the element definition of biblScope for some recommended values).</p>	<p>Added a suggestion to use the @type values recommended by the biblScope element definition.</p>
<p>When the item being cited is a journal article, the imprint element describing the issue in which it appeared may contain biblScope elements for volume and page numbers, together with a date element.</p> <p>For example:</p>		<p>While Council decided during its 2010-02-07 conference call that biblScope should be allowed only as a sibling but not also as a child of imprint, such a change would break conformance for many people's TEI documents and directly contradict this paragraph of the Guidelines. Since we find need for two sets of page numbers (as described in the "inria-00075838" example below), we decided to explain when to use biblScope as a child of imprint and when to</p>

<pre><biblStruct> <analytic> <author>Wrigley, E. A.</author> <title>Parish registers and the historian</title> </analytic> <monogr> <editor>Steel, D. J.</editor> <title>National index of parish registers</title> <imprint> <pubPlace>London</pubPlace> <publisher>Society of Genealogists</publisher> <date when="1968">1968</date> <biblScope type="vol">vol. 1</biblScope> <biblScope type="pp">pp. 155-167.</biblScope> </imprint> </monogr> </biblStruct></pre>	<pre><biblStruct> <analytic> <author> <persName> <surname>Wrigley</surname> <forename>E. A.</forename> </persName> </author> <title level="a">Parish registers and the historian</title> </analytic> <monogr> <editor> <persName> <surname>Steel</surname> <forename>D. J.</forename> </persName> </editor> <title level="j">National index of parish registers</title> <imprint> <pubPlace>London</pubPlace> <publisher>Society of Genealogists</publisher> <date when="1968">1968</date> <biblScope type="vol">vol. 1</biblScope> <biblScope type="pp">pp.155-167.</biblScope> </imprint> </monogr> </biblStruct></pre>	<p>use it as a sibling. See that example.</p> <p>Added name markup.</p> <p>Added title/@level (crucial here in the case of the journal title).</p> <p>Removed superfluous "pp. " and "1968" from text of elements.</p>
<p>The type attribute on biblScope is optional: both the following are legal examples:</p>		
<pre><biblStruct> <analytic> <author>Boguraev,</pre>	<pre><biblStruct> <analytic> <author><persName><surname>Boguraev</surname></pre>	<p>Added name markup.</p> <p>Added title/@level.</p>

<pre> Branimir</author> <author>Neff, Mary</author> <title>Text Representation, Dictionary Structure, and Lexical Knowledge</title> </analytic> <monogr> <title level="j">Literary & Linguistic Computing</title> <imprint> <biblScope type="vol">7</biblScope> <biblScope type="issue">2</biblScope> <date>1992</date> <biblScope type="pp">110- 112</biblScope> </imprint> </monogr> </biblStruct> </pre>	<pre> <forename>Branimir</forename></persName></author> <author><persName><surname>Neff</surname> <forename>Mary</forename></persName></author> <title level="a">Text Representation, Dictionary Structure, and Lexical Knowledge</title> </analytic> <monogr> <title level="j">Literary & Linguistic Computing</title> <imprint> <biblScope type="vol">7</biblScope> <biblScope type="issue">2</biblScope> <date when="1992"></date> <biblScope type="pp">110-112</biblScope> </imprint> </monogr> </biblStruct> </pre>	<p>Changed date to use @when.</p>
<pre> <biblStruct> <analytic> <author>Chesnutt, David</author> <title>Historical Editions in the States</title> </analytic> <monogr> <title level="j">Computers and the Humanities</title> <imprint> <biblScope>25.6</biblScope> </pre>	<pre> <biblStruct> <analytic> <author> <persName> <surname>Chesnutt</surname> <forename>David</forename> </persName> </author> <title level="a">Historical Editions in the States</title> </analytic> <monogr> <title level="j">Computers and the Humanities</title> <imprint> </pre>	<p>Added name markup.</p> <p>Added title/@level.</p>


```
<date when="1991-12">(December, 1991):</date>
  <biblScope>377-380</biblScope>
</imprint>
</monogr>
</biblStruct>
```

```
<biblScope>25.6</biblScope>
<date when="1991-12">(December, 1991):</date>
<biblScope>377-380</biblScope>
</imprint>
</monogr>
</biblStruct>
```

	<p>Certain citation styles call for the page number(s) cited to be included in the bibliographic reference along with the page number(s) for the whole bibliographic item. In such a case, include the cited page number(s) in a <biblScope> outside the <imprint>:</p>	<p>The Guidelines previously gave no examples with these two types of page numbers. We've now added one.</p>
	<pre><biblStruct type="inbook" xml:id="inria-00075838"> <analytic> <author> <persName> <forename>Serge</forename> <surname>Abiteboul</surname> </persName> </author> <author> <persName> <forename>Stephane</forename> <surname>Grumbach</surname> </persName> </author> <title type="main" level="a">COL : a logic-based language for complex objects</title> </analytic> <monogr> <title level="m" type="main">Advances in database programming languages</title> <imprint> <publisher>ACM Press</publisher> <date when="1987"></date> <biblScope type="fpage">347</biblScope> <biblScope type="lpage">374</biblScope> </imprint> <biblScope type="pp">349</biblScope> </monogr> <idno type="doi">10.1145/101620.101641</idno> <idno type="url">http://hal.inria.fr/inria-00075838/en/</idno> </biblStruct></pre>	<p>The example uses <biblScope type="fpage"> and <biblScope type="lpage"> to show how local processing needs might dictate use of other type values than those suggested in the definition of the element <biblScope>.</p>

<p>3.11.2.4 Series Information</p>		
<p>Series information may (in bibl elements) or must (in biblStruct elements) be enclosed in a series element or (in a biblFull element) a seriesStmt element. The title of the series may be tagged <title level="s">, the volume number <biblScope type="vol">, and responsibility statements for the series (e.g. the name and affiliation of the editor, as in the example in section 3.11.2.1 Analytic, Monographic, and Series Levels) may be tagged editor or respStmt.</p>		
<p>3.11.2.5 Related items</p>		
<p>In bibliographic parlance, a <i>related item</i> is any bibliographic item which, though related to that being defined, is distinct from it. The distinction between analytic and monographic items made above may be thought of as a special case of this kind of 'related' item. More usually however, the term is applied to such items as translations,</p>		

<p>continuations, different versions, parts, etc.</p>		
<p>The element relatedItem is provided as a means of documenting such associated items:</p>		
<p>relatedItem contains or references some other bibliographic item which is related to the present one in some specified manner, for example as a constituent or alternative version of it.</p>		
<p>In the following example, the first biblStruct describes a facsimile edition, and the second describes the work of which it is a facsimile. The relation between the facsimile and its source is represented by means of a relatedItem within the first description, which points to the description of the source.</p>		
<pre><biblStruct xml:id="bibl03"> <monogr> <author>Swinburne, Algernon Charles</author> <title>Swinburne's <title>Atalanta in Calydon</title>: A Facsimile of the First Edition</title> <editor>Georges</pre>	<pre><biblStruct xml:id="bibl03"> <monogr> <author> <persName> <surname>Swinburne</surname> <forename>Algernon Charles</forename> </persName> </author> <title level="m">Swinburne's <title level="m">Atalanta in Calydon</title>: A Facsimile of the</pre>	<p>Added name markup.</p> <p>Added title/@level.</p> <p>Moved date values to @when.</p>

<pre> Lafourcade</editor> <imprint> <pubPlace>London</pubPlace> </pubPlace> <publisher>Oxford UP</publisher> <date>1930</date> </imprint> </monogr> <relatedItem type="otherEdition"> <ref target="#bibl04"/> </relatedItem> </biblStruct> <biblStruct xml:id="bibl04"> <monogr> <author> Swinburne, Algernon Charles</author> <title>Atalanta in Calydon</title> <imprint> <pubPlace>London</pubPlace> </pubPlace> <publisher>Edward Moxon</publisher> <date>1865</date> </imprint> </monogr> </biblStruct> </pre>	<pre> First Edition</title> <editor> <persName> <forename>Georges</forename> <surname>Lafourcade</surname> </persName> </editor> <imprint> <pubPlace>London</pubPlace> <publisher>Oxford UP</publisher> <date when="1930"></date> </imprint> </monogr> <relatedItem type="otherEdition"> <ref target="#bibl04"/> </relatedItem> </biblStruct> <biblStruct xml:id="bibl04"> <monogr> <author> <persName> <surname>Swinburne</surname> <forename>Algernon Charles</forename> </persName> </author> <title level="m">Atalanta in Calydon</title> <imprint> <pubPlace>London</pubPlace> <publisher>Edward Moxon</publisher> <date when="1865"></date> </imprint> </monogr> </biblStruct> </pre>	
<p>The ref element in the above example could be replaced by the referenced biblStruct itself</p>		

<p>since a relatedItem may contain any form of bibliographic reference. For example, one of the examples quoted above might also be encoded as follows:</p>		
<pre><biblStruct> <monogr> <author>Shirley, James</author> <title type="main">The gentlemen of Venice</title> <imprint> <pubPlace>New York</pubPlace> <publisher>Readex Microprint</publisher> <date>1953</date> </imprint> <extent>1 microprint card, 23 x 15 cm.</extent> </monogr> <series> <title>Three centuries of drama: English, 1642- 1700</title> </series> <relatedItem type="otherEdition"> <biblStruct> <monogr> <author>Shirley, James</author> <title type="main">The gentlemen of Venice</title> <title type="subordinate">a</pre>	<pre><biblStruct> <monogr> <author> <persName> <surname>Shirley</surname> <forename>James</forename> </persName> </author> <title type="main" level="m">The gentlemen of Venice</title> <imprint> <pubPlace>New York</pubPlace> <publisher>Readex Microprint</publisher> <date when="1953"></date> </imprint> <extent>1 microprint card, 23 x 15 cm.</extent> </monogr> <series> <title level="s">Three centuries of drama: English, 1642- 1700</title> </series> <relatedItem type="otherEdition"> <biblStruct> <monogr> <author> <persName> <surname>Shirley</surname> <forename>James</forename> </persName> </author> <title type="main" level="m">The gentlemen of Venice</title></pre>	<p>Added name markup.</p> <p>Added title/@level.</p> <p>Moved data values to @when.</p> <p>Changed title/@type from "subordinate" to "sub" to conform with suggested values in element definition.</p>

<p>tragi-comedie presented at the private house in Salisbury Court by Her Majesties servants</title> <imprint> <pubPlace>London</pubPlace> <publisher>H. Moseley</publisher> <date>1655</date> </imprint> <extent>78 p.</extent> </monogr> </biblStruct> </relatedItem> </biblStruct></p>	<pre><title type="sub" level="m">a tragi-comedie presented at the private house in Salisbury Court by Her Majesties servants</title> <imprint> <pubPlace>London</pubPlace> <publisher>H. Moseley</publisher> <date when="1655"></date> </imprint> <extent>78 p.</extent> </monogr> </biblStruct> </relatedItem> </biblStruct></pre>	
<p>The type attribute should be used to indicate the relationship between the bibliographic item and any relatedItem it contains or points to. The relationships may be transitive (for example translatedAs or reprintedFrom) or non-transitive (for example otherEdition). The subtype attribute may be used to provide a more detailed classification, where this is appropriate. Some further examples follow:</p>		

```

<biblStruct>
<monogr>
<author>Tolkien,
J.R.R.</author>
<title>Den hobbit</title>
<title type="sub">aus dem
Engleschen iwwersat</title>
<editor
role="translator">Henry
Wickens</editor>
<imprint>
<pubPlace>Esch-sur-
Sûre</pubPlace>
<publisher>Op der Lay S. àr.
L</publisher>
<date>2002</date>
</imprint>
</monogr>
<relatedItem
type="translatedFrom">
<bibl>
<author>Tolkien,
J.R.R.</author>
<title>The Hobbit</title>.

<publisher>Collins</publishe
r>
<date>1997</date>
</bibl>
</relatedItem>
</biblStruct>

```

```

<biblStruct>
<monogr>
<author>
<persName>
<surname>Tolkien</surname>
<forename>J.R.R.</forename>
</persName>
</author>
<title level="m">Den hobbit</title>
<title type="sub">aus dem Engleschen iwwersat</title>
<editor role="translator">
<persName>
<forename>Henry</forename>
<surname>Wickens</surname>
</persName>
</editor>
<imprint>
<pubPlace>Esch-sur-Sûre</pubPlace>
<publisher>Op der Lay S. àr. L</publisher>
<date when="2002"></date>
</imprint>
</monogr>
<relatedItem type="translatedFrom">
<biblStruct>
<monogr>
<author>
<persName>
<surname>Tolkien</surname>
<forename>J.R.R.</forename>
</persName>
</author>
<title level="m">The Hobbit</title>
<imprint>
<publisher>Collins</publisher>
<date when="1997"></date>
</imprint>

```

As in the case of a previous example above, it seems odd that a <biblStruct> and a <bibl> would be used side-by-side in the way the original example shows, especially as the following text refers to it as a "full bibliographic description", so the <relatedItem> has been converted to a <biblStruct> as well.

Added name markup.

Added title/@level.

Moved date values to @when.

	<pre> </monogr> </biblStruct> </relatedItem> </biblStruct> </pre>	
<p>In this example, a full bibliographic description of the edition used as source for the translation is provided within the content of the relatedItem. Alternatively this might be provided by means of a link, in which case the relatedItem would be empty:</p>		
<pre> <relatedItem type="translatedFrom" target="http://www.example. com/bibliography.xml#TOLK9 7" /> </pre>		
<p style="text-align: center;">3.11.2.6 Notes and Other Additional Information</p>		
<p>Explanatory notes about the publication of unusual items, the form of an item (e.g. <i>[Score]</i> or <i>[Microform]</i>), or its provenance (e.g. <i>translation of ...</i>) may be tagged using the note element. The same element may be used for any descriptive annotation of a bibliographic entry in a</p>		

database.		
note contains a note or annotation.		
For example:		
<pre><bibl> <author>Coombs, James H., Allen H. Renear, and Steven J. DeRose.</author> <title level="a">Markup Systems and the Future of Scholarly Text Processing.</title> <title level="j">Communications of the ACM</title> <biblScope>30.11 (November 1987): 933-947.</biblScope> <note>Classic polemic supporting descriptive over procedural markup in scholarly work.</note> </bibl></pre>	<pre><bibl> <author>Coombs, James H.</author>, <author>Allen H. Renear</author>, and <author>Steven J. DeRose</author>. <title level="a">Markup Systems and the Future of Scholarly Text Processing</title>. <title level="j">Communications of the ACM</title> <biblScope>30.11 (November 1987): 933-947</biblScope>. <note>Classic polemic supporting descriptive over procedural markup in scholarly work.</note> </bibl></pre>	<p>Tagged individual authors.</p> <p>Moved punctuation outside tags.</p>
	<p>This example also demonstrates the much looser approach to markup which can be taken with <bibl>. Although <bibl> is often used in a more informal, unstructured way than <biblStruct>, it is possible to mark up the information in a bibliographical reference with as much precision and detail with <bibl> as it is with <biblStruct>, while simultaneously retaining the original order and punctuation of the text. Here is the same example with more rigorous markup applied to it:</p>	<p>In this paragraph and the following example, MH wants to re-iterate his suggestion that, although <biblStruct> is the subject of most of our examples in this chapter, <bibl> is actually often a better choice, even when precision and detail is required; the absence of structure does not preclude the harvesting of all the information by a processing agent, and the retention of a default format and sequence of items makes</p>

		rendering much easier.
	<pre> <bibl> <author> <persName> <surname>Coombs</surname>, <forename>James H.</forename> </persName> </author>, <author> <persName> <forename>Allen H.</forename> <surname>Renear</surname> </persName> </author>, and <author> <persName> <forename>Steven J.</forename> <surname>DeRose</surname> </persName> </author>. <title level="a">Markup Systems and the Future of Scholarly Text Processing</title>. <title level="j">Communications of the ACM</title> <biblScope type="vol">30</biblScope>.<biblScope type="issue">11</biblScope> (<date when="1987-11">November 1987</date>): <biblScope type="pp">933-947</biblScope>. <note>Classic polemic supporting descriptive over procedural markup in scholarly work.</note> </bibl> </pre>	
<p>3.11.2.7 Order of Components within References</p>		
<p>The order of elements in bibl elements is not constrained.</p>		

<p>In biblStruct elements, the analytic element, if it occurs, must come first, followed by one or more monogr and series elements, which may appear intermingled (as long as a monogr element comes first). Within analytic, the title(s), author(s), editor(s), and other statements of responsibility may appear in any order; it is recommended that all forms of the title be given together. Within monogr, the author, editor, and statements of responsibility may either come first or else follow the monographic title(s). Following these, the elements must appear in the following order:</p>		
<ul style="list-style-type: none"> • notes on the publication (and meeting elements describing the conference, in the case of a proceedings volume) • edition elements, each followed by any related editor or respStmt elements • imprint • biblScope 	<ul style="list-style-type: none"> • notes on the publication (and meeting elements describing the conference, in the case of a proceedings volume) • edition elements, each followed by any related editor or respStmt elements • imprint • biblScope (if it appears outside <imprint>) 	<p>Added clarification for <biblScope>. This is commonly used both outside and inside <imprint>, and disallowing one of these would break backward compatibility.</p>

<p>Within imprint, the elements allowed may appear in any order.</p>		
<p>Finally, within the series information in a biblStruct, the sequence of elements is not constrained.</p>		
<p>If more detailed structuring of a bibliographic description is required, the biblFull element should be used. This is not further described here, as its contents are essentially equivalent to those of the fileDesc element in the teiHeader, which is fully described in section 2.2 The File Description.</p>		
<p><i>3.11.3 Bibliographic Pointers</i></p>		
<p>References which are pointers to bibliographic items, of whatever kind, should be treated in the same way as other cross-references (see section 3.6 Simple Links and Cross-References). As discussed in that section, cross-referencing within TEI texts is in general represented by means of ptr or ref elements. A target attribute on</p>		

<p>these elements is used to supply an identifying value for the target of the cross-reference, which should be, in the case of bibliographic elements, a bibliographic reference of some kind. Where the form of the reference itself is unimportant, or may be reconstructed mechanically, or is not to be encoded, the ptr element is used, as in the following example:</p>		
<p>As shown above (<ptr target="#NEL80"/>) ...</p>		
<p>Where the form of the reference is important, or contains additional qualifying information which is to be kept but distinguished from the surrounding text, the ref element should be used, as in the following example:</p>		
<p>Nelson claims <ref target="#NEL80">(ibid, passim)</ref> ...</p>		
<p>It may be important to distinguish between the short form of a bibliographic reference and some qualifying or additional information. The latter should not appear within the scope of the ref</p>		

<p>element when this is the case, as for example in an application concerned to normalize bibliographic references:</p>		
<p>Nelson claims (<ref target="#NEL80">Nelson [1980]</ref> pages 13–37) ...</p>		
<p><i>3.11.4 Relationship to Other Bibliographic Schemes</i></p>		
<p>The bibliographic tagging defined here can capture the distinctions required by most bibliographic encoding systems; for the benefit of users of some commonly used systems, the following lists of equivalences are offered, showing the relationship of the markup defined here to the fields defined for bibliographic records in the Scribe, BibTeX, and ProCite systems.</p>		
<p>Listed below are the equivalences between the various bibliographic fields defined for use in the Scribe and BibTeX systems of bibliographic databases and</p>		

<p>the elements defined in this module. [Note 17: The BibTeX scheme is intentionally compatible with that of Scribe, although it omits some fields used by Scribe. Hence only one list of fields is given here.] Elements and structures available in the module defined here which have no analogues in Scribe and BibTeX are not noted.</p>		
<p>address tag as placeName or address annote tag as note author tag as author booktitle tag as <title level="m"> or title within monogr chapter tag as <biblScope type="chapter"> date used only to record date entry was made in the bibliographic database; not supported edition tag as edition editor tag as editor or respStmt editors tag as multiple editor or respStmt elements fullauthor use the reg element, possibly inside a choice element, inside either an author, persName or name fullorganization</p>	<p>address tag as placeName or address annote tag as note author tag as author booktitle tag as <title level="m"> or title within monogr chapter tag as <biblScope type="chap"> date used only to record date entry was made in the bibliographic database; not supported edition tag as edition editor tag as editor or respStmt editors tag as multiple editor or respStmt elements fullauthor use the reg element, possibly inside a choice element, inside either an author, persName or name fullorganization</p>	<p>Changed biblScope/@type='chapter' to 'chap', in accordance with the value suggested in the <biblScope> element definition.</p> <p>Added <persName> to the "fullauthor" explanation, in accordance with our policy in the examples.</p> <p>Added <orgName> to the "fullorganization" explanation.</p> <p>Removed "or title within monogr" from "journal" explanation (see discussion of this issue above).</p> <p>Added "or <orgName>" to the explanation of "organization".</p> <p>Changed "or" to "and" to encourage universal use of @level.</p>

<p>tag as multiple editor or respStmt elements</p>	<p>use the reg element, possibly inside a choice element, inside a <name type="org"> or <orgName></p>	
<p>fullauthor use the reg element, possibly inside a choice element, inside either an author or name</p>	<p>howpublished tag as note, possibly using the form <note place="inline"></p>	
<p>fullorganization use the reg element, possibly inside a choice element, inside a <name type="org"></p>	<p>institution used only for issuer of technical reports; tag as publisher</p>	
<p>howpublished tag as note, possibly using the form <note place="inline"></p>	<p>journal tag as <title level="j"> or title within monogr</p>	
<p>institution used only for issuer of technical reports; tag as publisher</p>	<p>key used to specify an alternate sort key for the bibliographic item, for use instead of author's or editor's name; not supported</p>	
<p>journal tag as <title level="j"> or title within monogr</p>	<p>meeting tag as meeting or as note</p>	
<p>key used to specify an alternate sort key for the bibliographic item, for use instead of author's or editor's name; not supported</p>	<p>month use date; if the date is not in a trivially parseable form, use the when attribute to provide a normalized equivalent in one of the format from XML Schema Part 2: Datatypes Second Edition</p>	
<p>meeting tag as meeting or as note</p>	<p>note tag as note</p>	
<p>month use date; if the date is not in a trivially parseable form, use the</p>	<p>number tag as <biblScope type="issue"> or <biblScope type="number">; for technical report numbers, use <idno type="docno"></p>	
	<p>organization used only for sponsor of conference; use <name type="org"> or <orgName> within respStmt within meeting element</p>	
	<p>pages tag as <biblScope type="pp"></p>	
	<p>publisher tag as publisher</p>	
	<p>school used only for institutions at which thesis work is done; tag as publisher</p>	
	<p>series tag as <title level="s"> or title within series</p>	
	<p>title tag as title in appropriate context and with appropriate level value</p>	

when attribute to provide a normalized equivalent in one of the format from XML Schema Part 2: Datatypes Second Edition

note

tag as note

number

tag as <biblScope type="issue"> or <biblScope type="number">; for technical report numbers, use <idno type="docno">

organization

used only for sponsor of conference; use <name type="org"> within respStmt within meeting element

pages

tag as <biblScope type="pp">

publisher

tag as publisher

school

used only for institutions at which thesis work is done; tag as publisher

series

tag as <title level="s"> or title within series

title

volume

tag as <biblScope type="vol">

year

tag as date; if the date is not in a trivially parseable form, use the when attribute to provide an ISO-format equivalent

<p>tag as title in appropriate context or with appropriate level value</p> <p>volume tag as <biblScope type="vol"></p> <p>year tag as date; if the date is not in a trivially parseable form, use the when attribute to provide an ISO-format equivalent</p>		
	<p>3.11.5 Electronic References</p>	<p>This new section is essential; more and more of our bibliographic references are electronic, and the current version of the guidelines does not provide any guidance for this.</p>
	<p>Bibliographic references to electronic documents are increasingly common. They often fit uneasily into the traditional bibliographical constructs we are familiar with, and for which <biblStruct> and <bibl> were developed. The following examples are intended to give some guidance for marking up some specific types of electronic reference, and also to suggest approaches to marking up future forms of electronic document or publication model, as they appear. Different citation styles call for recording different bibliographic information; this section only attempts to explain how you might encode certain bibliographic data about an electronic document.</p>	
	<p>A fundamental problem with modern electronic references is scoping. While some types of document clearly map to the traditional <i>analytic</i>, <i>monographic</i>, and other categories, others are an uneasy fit. For instance, what is a website? Is it a monograph? (It may have been created by a team of people over a long period of time, and it may also pull in remote content from other sources). We can characterize a blog</p>	

	<p>post as analytic (it's a sort of article) and its host blog as monographic (it's a sort of collection of articles), but what about a third-party comment on a blog post? Who is the publisher of a blog, and where is it published?</p>	
	<p>The continuing evolution of electronic document types and publication frameworks ensures that what follows can only really serve as a set of helpful hints. However, in the case of online sources in particular, we have one advantage which somewhat offsets these difficulties: we can point directly at the document itself, through a URI. For instance, here is an example of a blog post, marked up using <biblStruct>:</p>	
	<pre><biblStruct type="blogPost"> <analytic> <title level="a">Examples of Collaborative Digital Humanities Projects</title> <author> <persName> <forename>Lisa</forename> <surname>Spiro</surname> </persName> </author> <date when="2009-06-01"></date> <ref target="http://digitalscholarship.wordpress.com/2009/06/01/exampl es-of-collaborative-digital-humanities-projects/"></ref> </analytic> <monogr> <title level="m">Digital Scholarship in the Humanities</title> <author> <persName> <forename>Lisa</forename> <surname>Spiro</surname> </persName> </author> <ref target="http://digitalscholarship.wordpress.com/"></ref></pre>	<p>This markup depends on two recent feature requests:</p> <p>2987832: <date> as child of <analytic> and <monogr>, which enables us to provide the date for the specific posting:</p> <p>http://sourceforge.net/tracker/?func=detail&aid=2987832&group_id=106328&atid=644065</p> <p>2976608 : Add <ref> as a child of <analytic>, <monogr> and <series>, which allows us to provide URIs for both the individual post, and the containing blog:</p> <p>http://sourceforge.net/tracker/?func=detail&aid=2976608&group_id=106328&atid=644065</p>

	<pre></monogr> </biblStruct></pre>	<p>4065</p> <p>With regard to the former, it seems clear to me that the date of this blog post belongs in the <analytic> element, because it applies specifically to the one post; there is no meaningful publication date for the containing blog as a whole.</p>
	<p>Note the use of the @type attribute to identify the document as a blog post. This will be discussed in more detail below.</p> <p>In the same way, we can mark up an online journal article in a manner very similar to the way we would approach an article in a traditional print journal:</p>	
	<pre><biblStruct type="onlineArticle"> <analytic> <title level="a">The Ends of Editing</title> <author> <persName> <forename>Peter M. W.</forename> <surname>Robinson</surname> </persName> </author> </ref</pre>	<p>As above, this depends on two feature requests which are currently under consideration.</p> <p>There is one issue that ought to be addressed here, but I'm not sure how to address it. In the case of an ISSN number, the number applies to the whole journal, not to one volume or issue or article. This example follows previous ones in using</p>

	<pre>target="http://www.digitalhumanities.org/dhq/vol/3/3/000051/000051.html"></ref> <date when="2009-09-29"></date> </analytic> <monogr> <title level="j">Digital Humanities Quarterly</title> <ref target="http://www.digitalhumanities.org/dhq/vol/3/3/index.html"></ref> <imprint> <date when="2009" notBefore="2009-06" notAfter="2009-09">Summer 2009</date> <biblScope type="vol">3</biblScope> <biblScope type="issue">3</biblScope> </imprint> </monogr> <idno type="issn">ISSN 1938-4122</idno> </biblStruct></pre>	<p><idno> as a child of <biblStruct> to encode the ISSN number, but this suggests it's a property of the article; while putting it in <monogr> would suggest it's a property of the individual volume/number. Should information pertaining to the journal as a whole be in a <series> element?</p>
	<p>Note that while the journal issue itself has a date (Summer 2009), the individual article also has a more precise date, which was extracted from the publication information in the TEI XML file of the article itself.</p>	
	<p>In the following example, a "website" is the subject of a <biblStruct>. Scoping is a notoriously difficult issue here; in some cases it is clear that all the content at a specific domain constitutes a single site (http://www.tei-c.org, for example), but in other cases (e.g. http://web.uvic.ca) a domain may house many sites which are relatively independent from each other. For the purposes of this example, we will assume that the website in question is published as an independent item and therefore merits use of <monogr>.</p>	
	<p>It can also be difficult to determine where the responsibility for a site rests; authorship is frequently collective and content may be completely</p>	<p>Note: The Chicago Manual of Style recommends citing the owner of the site if the author cannot be determined. Should we</p>

	unattributed.	also recommend this? How would we recommend determining the owner of a site? WHOIS?
	<pre> <biblStruct type="website"> <monogr> <title level="m">The William Blake Archive</title> <editor> <persName> <forename>Morris</forename> <surname>Eaves</surname> </persName> </editor> <editor> <persName> <forename>Robert</forename> <surname>Essick</surname> </persName> </editor> <editor> <persName> <forename>Joseph</forename> <surname>Viscomi</surname> </persName> </editor> <ref target="http://www.blakearchive.org/"></ref> <date notBefore="1996"></date> </monogr> </biblStruct> </pre>	
	<p>This particular website is helpful in clearly identifying its editors; others may not be. The site does not appear to have any individual or organization that could be identified as a "publisher", nor does it have a particular locus of operations that could be identified as a publication place. Since it is in continual development, it has no "date", although the site does announce that it has been "a free site on the World Wide Web</p>	<p>The discussion in this paragraph may be beyond the scope of the guidelines, but it does help to clarify some issues with regard to missing information and inconclusive dates. Delete or retain?</p>

since 1996", hence the use of @notBefore on the date element.

The following example shows the citation of a single "article" (a diary entry) from another kind of online anthology:

```
<biblStruct type="diaryEntry">
  <analytic>
    <title level="a">Wednesday May 22.</title>
    <author>
      <persName>
        <forename>Robert</forename>
        <surname>Graves</surname>
      </persName>
    </author>
    <ref
target="http://graves.uvic.ca/xbrowse.xq?collection=%2Fdb%2Fgrave
s&type=diaryentry&day=22&month=05&year=193
5"></ref>
      <date when="1935-05-22"></date>
    </analytic>
    <monogr>
      <title level="m">Diary of Robert Graves 1935-39 and ancillary
material</title>
      <author>
        <persName>
          <forename>Robert</forename>
          <surname>Graves</surname>
        </persName>
      </author>
      <respStmt>
        <resp>Compiled by</resp>
        <persName>
          <forename>Beryl</forename>
          <surname>Graves</surname>
        </persName>
      </persName>
    </monogr>
  </biblStruct>
```


	<pre> <forename>C.G.</forename> <surname>Petter</surname> </persName> <persName> <forename>L.R.</forename> <surname>Roberts</surname> </persName> </respStmt> <ref target="http://graves.uvic.ca/"></ref> <imprint> <publisher>University of Victoria Libraries</publisher> <pubPlace>Victoria, BC, Canada</pubPlace> <date when="2003"></date> </imprint> </monogr> </biblStruct> </pre>	
	<p>This example shows two interesting features: first, the diary entry itself is explicitly dated to 1935, while the online edition of the diary carries a date of 2003. Secondly, in this case we do have a known publisher and publication place. These are included in the <imprint> element, which should be used regardless of the medium of publication.</p>	<p>Note: MH believes we should make it possible to include elements from model.imprintPart as direct children of <analytic>, <monogr> and <series>, but he has not determined whether there would be enough council support for this to make a feature request as yet. He would actually like to abolish <imprint> entirely, eventually, but that would not be backward-compatible.</p>
	<p>This example demonstrates how we might mark up a citation of a tweet on Twitter:</p>	
	<pre> <biblStruct type="microBlogPost"> <monogr> <title level="m">What will it take to get markup languages into the undergraduate curriculum (where they belong?) </pre>	

	<pre> </title> <author> <persName> <forename>Wendell</forename> <surname>Piez</surname> </persName> </author> <imprint> <date when="2009-05-15T08:12:00"></date> </imprint> <ref target="http://twitter.com/WendellPiez/status/1806820510"></ref> </monogr> </biblStruct> </pre>	
	<p>Here, the entire content of the tweet is included in the <title> tag, because tweets have no distinct title, and are constrained to a maximum of 140 characters anyway. Tweets have not only date but also time information, which can be included in the @when attribute on <date>. Each tweet has a unique URI, encoded in the <ref> element's @target attribute.</p>	<p>MH doesn't know, and couldn't easily find out, what timezone information pertains to the datetime of a tweet as shown on the web. He suspects that the viewer sees the tweet's time adjusted for their own timezone. Is it worth mentioning this?</p>
	<p>This example is a software programme. Standalone software can be treated as a monograph. Again, a precise date and time can be determined for the particular version of the software we are tagging.</p>	
	<pre> <biblStruct type="software"> <monogr> <title level="m">TEI Comparator</title> <author> <persName> </pre>	<p>MH has included SourceForge as <distributor> here; he's not sure whether <publisher> would be more appropriate, or whether some other institution (Oxford U?) might be better identified as the publisher.</p>

```

    <forename>Arno</forename>
    <surname>Mittelbach</surname>
  </persName>
</author>
<author>
  <persName>
    <forename>James</forename>
    <surname>Cummings</surname>
  </persName>
</author>
<author>
  <persName>
    <forename>Sebastian</forename>
    <surname>Rahtz</surname>
  </persName>
</author>
<edition>RC1 1.0</edition>
<imprint>
  <date when="2009-11-15T17:22:54"></date>
  <distributor>SourceForge</distributor>
</imprint>
  <ref target="http://tei-comparator.sourceforge.net"></ref>
</monogr>
</biblStruct>

```

MH also thinks information about the licence should be included for software (in this case, it is mostly GPL v.3, but includes LGPL code and possibly other licences). However, he couldn't determine how best to encode this.

All of the above examples use a specific @type attribute on <biblStruct>, and this deserves some explanation. Most TEI markup will end up being processed through a rendering engine to produce human-readable output in a format such as XHTML or PDF, and bibliographical references will normally be rendered according to a particular style guide (MLA, Chicago, APA, etc.) to meet the requirements of the publication context. Each style guide provides specific instructions for the formatting of references based on the nature of the reference. For instance, journal articles will be rendered according to a specific set of instructions, distinct from the instructions for rendering blog posts, or encyclopaedia entries. In the case of simple or traditional

The SIG on Scholarly Publishing has vaguely committed itself to building an ontology of document types. If it should succeed, I would very much like to generate from it a set of recommended values for @type on <biblStruct>, so that we can encourage some standardization here. This is of course a moving target — new document types appear all the time — so this is one context in which a set of recommended, rather than prescribed, values would be appropriate.

bibliographical references (books, journal articles etc.), it is usually possible to determine what type of reference is contained in the <biblStruct> by analyzing its contents. For example, if it contains an <analytic> and a <monogr>, and the <monogr> contains a <title level="j">, then we can conclude that it's a journal article. However, in many cases — especially references for electronic documents — it can be impossible to determine the type of reference based on the contents, and therefore difficult to know what rendering algorithm to invoke. The @type attribute on <biblStruct> can be used to specify the document type, in order to make processing, sorting and categorizing easier for downstream systems that might make use of the markup.